



WICKERSLEY
PARTNERSHIP
TRUST.

Educational Visits and Learning Outside the Classroom Policy

OWNER: Senior Operations Manager

DATE: September 2023

APPROVED BY: Board of Directors

REVIEW DATE: September 2025

WICKERSLEY PARTNERSHIP TRUST

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This policy does not form part of the contract of employment and from time to time may be altered following consultation and negotiations with recognised Trade Unions. Any changes will be communicated to employees with reasonable notice. The policy may vary from time to time on a case- by-case basis in consultation and agreement with Union Representatives.

1 – Introduction

Wickersley Partnership Trust (hereafter known as WPT) is committed to ensuring that students have a wide range of educational visit experiences to enrich their learning.

We believe that educational visits are an integral part of the entitlement of every student to an effective and balanced curriculum. The benefits to students of taking part in visits and learning outside the classroom include, but are not limited to:

- Improvements in their ability to cope with change
- Increased critical curiosity and resilience
- Opportunities for meaning making, creativity, developing learning relationships and practising strategic awareness
- Increased levels of trust and opportunities to examine the concept of trust (us in them, them in us, them in themselves, them in each other)
- Improved achievement and attainment across a range of curricular subjects. Students are active participants not passive consumers, and a wide range of learning styles can flourish
- Enhanced opportunities for ‘real world’ ‘learning in context’ and the development of the social and emotional aspects of intelligence
- Increased risk management skills through opportunities for involvement in practical risk-benefit decisions in a range of contexts, ie: encouraging students to become more risk aware as opposed to risk averse
- Greater sense of personal responsibility
- Possibilities for genuine team working including enhanced communication skills
- Improved environmental appreciation, knowledge, awareness and understanding of a variety of environments
- Improved awareness and knowledge of the importance and practices of sustainability
- Physical skill acquisition and the development of a fit and healthy lifestyle

This policy will provide a clear outline of what is expected of WPT staff when planning and delivering educational visits.

2 – Aims

To explain how to safely plan, organise and conduct educational visits including identifying when it is appropriate to use Evolve.

To explain how to create a record of the educational visit and what the arrangements are in a school for gaining approval.

To explain how to prepare and organise the financial aspects of educational visits.

To explain how to make decisions about charging for educational visits.

3 – Legal Basis

This policy has been written to be compliant with the Department for Education Guidance [Health and Safety on Educational Visits](#).

WPT has adopted the [Outdoor Education Advisers' Panel \(OEAP\) National Guidance](#) as an integral part of the Educational Visits Policy.

4 – Inclusion

The Equality Act 2010 states that the responsible body of a school must not discriminate, harass or victimise a student to whom one of the protected characteristics applies (disability; gender reassignment; pregnancy and maternity; race; religion or belief; sex and sexual orientation) in the way that it affords (or not) the student access to a benefit, facility or service. WPT accepts and welcomes our duty to make reasonable adjustments for the purpose of inclusion.

WPT will make every effort to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender, religion or any of the other protected characteristics. If a visit needs to cater for children and young people with special needs, every reasonable effort will be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

5 – Visit Categorisation, Recording and Approval

WPT categorises educational visits into three categories. These categories are detailed below. For category 1 & 2 visits, these are recorded on 'EVOLVE', which is the online system for the planning, approval and management of educational visits.

Type 0 – No EVOLVE Required

These educational visits involve no more than an everyday level of risk, such as slips and trips or are covered by a school's current policies and procedures and are taking place on Trust property. They only need a little extra planning beyond the educational aspect of the trip. They can be considered as lessons in a different classroom.

These are educational visits that are within the school day. Whilst parents should be informed about these visits, they do not need to provide written consent (please note that this does not negate a general need for schools to ask parental permission on issues such as photographs). An example of this type of educational visit would be when one school in the Trust travels to another Trust premise to watch a school play.

At secondary schools, regarding school sports fixtures/events and Trust hosted activities at Ulley reservoir, due to the regular and routine nature of these activities and age of the students involved, these activities are classed as Type 0 educational visits. The aide memoir of (Appendix A) for Type 0 educational visits must be followed.

At primary schools, regarding internal Trust school sports fixtures, events, Trust swimming lessons and Trust hosted activities at Ulley reservoir, due to the regular and routine nature of these activities and age of the students involved, these activities are classed as type 0 educational visits. The aide memoir (Appendix A) for Type 0 educational visits must be followed.

Type 0 educational visits do not need to be recorded on Evolve. However, to support these educational visits, the table in Appendix A sets out the minimum steps needed for safe planning and preparation.

Type 1 - EVOLVE Required

Educational visits that need risk assessment and extra planning and are not covered by existing policies and risk assessments. This could include factors such as:

- Locations outside of the school and Trust premises
- Travel that includes non-Trust transport and/or busy roads
- Contact with the general public

At primary schools, regarding school sports fixtures/events which require travel to a non-Trust site or involvement of non-Trust participants, these activities would be classed as Type 1 visits and recorded on EVOLVE. This recognises the younger age and increased dependence of the students involved, as well as the relatively infrequent nature of these activities in primary schools. All 'School Games' activities, involving non-Trust participants or hosted at non-Trust sites require EVOLVE.

Type 2 - EVOLVE Required

Type 2 visits involve a level of risk higher than Type 1 visits. This risk is derived from the activities the visit entails or the location of the visit. Type 2 visits include visits abroad and adventurous activities, such as hill walking and visits by water

Type 1 and Type 2 visits each require planning and approval within Evolve. This additional level of oversight, quality assurance and scrutiny is due to the additional risk involved in these types of educational visits.

An important part of planning for any educational visit is to consider what hazards or risks the visit may involve and put in place plans to account for this. EVOLVE is set up to help staff through this process via the provision of templates which detail commonly occurring hazards.

All visit plans should be submitted to the Evolve system 6 weeks prior to the visit. This allows for a safe amount of time for visits to be planned correctly and to go through the authorisation process.

All Type 1 and Type 2 visits would be expected to have, as a minimum, a risk assessment for the visit ('GRA1 All Visits' template) and to cover travel ('GRA2 Travel' template), unless the visit is a local activities visit ('GRA31 Local Activities' template to be completed). The risk assessments must be completed by a staff member who understands the activity that is being risk assessed and attending the visit. For example, it would not be acceptable to ask a staff member who has little knowledge of the trip venue, purpose and attending students to complete a risk assessment. Whoever completes

the risk assessments must be sufficiently senior to ensure that the actions identified in the risk assessments are completed and adhered to.

Risk assessment templates can be sourced via EVOLVE. These risk assessments are templates, **they should be amended to be specific to the visit being assessed** and each section of the risk assessment must be completed in full, then the form signed and dated. There are a range of risk assessment templates available, dependant on the activities being undertaken e.g 'Sports Match' or 'Coastal Visits'.

To understand what risks there may be on a visit, it is important that the physical location and layout of a venue is considered. This may require a physical visit to the site as part of the visit planning. Google maps can also be utilised to inform trip planning but the Visit Leader must make sure the information is up to date.

Completed risk assessments **must** be shared with other adults, including volunteers, who are involved in the educational visit. Those completing risk assessments **must** ensure that the staff and volunteers whom they share the risk assessments with understand them.

Certain aspects may also need to be shared with the students attending the visits such as emergency procedures, meeting points, safety equipment etc.

For adventurous activities or those activities involving a higher level of risk that are being provided by an external third party, e.g. horse riding, staff organising the educational visit are not expected to complete specific risk assessments for those activities. However, staff are expected to make appropriate checks of the external provider to ensure that they are able to safely provide these activities. This is done by obtaining a completed provider statement, contained in Appendix C. Staff should give specific consideration to what activities are considered adventurous. This definition is not limited to activities that are directly adventurous by their nature, such as abseiling, rock climbing or canoeing. Activities can also be considered adventurous by their proximity to certain environments, e.g. water. An example of this would be a visit to a beach, which does not include the students going in the water to swim. This visit is still adventurous due to its proximity to water, even though the planning of the visit does not include the students accessing the water. The Educational Visit Coordinator can give further advice on this matter.

Schools using an outside organisation to provide an activity must check they have appropriate safety standards and liability insurance. This assurance task is completed by ensuring that the provider completes and returns the template 'Provider statement' contained in Appendix C. This document must be uploaded to the EVOLVE record. The Council for Learning Outside the Classroom (LOtC) awards the Learning Outside the Classroom Quality Badge to organisations who meet nationally recognised standards. Schools can check if an organisation holds the [LOtC Quality Badge](#).

If an organisation does not hold the badge, the school must check that they're an appropriate organisation to use. This could include checking:

- Their insurance
- That they meet legal requirements
- Their health and safety and emergency policies

- Their risk assessments
- Control measures
- Their use of vehicles
- Staff competence
- Safeguarding
- Accommodation
- Any sub-contracting arrangements they have that they have a licence where needed

The school should have an agreement with them that makes it clear what everyone is responsible for. This is especially important if they'll be taking over supervision of the children. Organisations need a licence to provide some adventure activities. Organisations who hold the LOTC Quality Badge should hold a licence for the activity they provide. More information is available on the [Health and Safety Executive \(HSE\) website](#).

Educational visits abroad can have extra risks and need a higher level of risk assessment. Schools should make sure any organisation that is providing activities holds the LOTC Quality badge or similar local accreditation.

The HSE does not cover incidents overseas. However, it can investigate work done in Britain to support the trip, like risk assessments. School staff could also be liable under civil law for any injuries to the children due to negligence.

If the educational visit includes significant risks, such as challenging terrain, going to remote places or extreme climates, follow the guide to the British Standard for adventurous activities outside the United Kingdom as the basis for the planning and risk assessment. Organisations employed by the school should follow this too. If they have LOTC Quality Badge, then they follow this standard.

Schools should consider the Foreign and Commonwealth Office's detailed guidance on safer adventure travel and volunteering overseas when organising adventure visits abroad. A teachers' pack is also available.

Contingency and risk assessment

When planning and risk assessing educational visits, it is important to consider all realistic contingencies. For example, when risk assessing a visit that is either abroad or a considerable distance from school, it is important to consider how individual students or staff members would be brought back in an emergency, such as illness. Similarly, with visits abroad, it is important to have a plan in place for how the school would ensure another member of staff could join the group in an emergency, or how the school would cope with a member of the party being detained at a border.

The purpose of this planning is not to foresee every eventuality and plan in detail, but to consider what events are possible, especially if those outcomes would have a significant impact on the viability and / or safety of the visit.

Educational Visits Coordinator (EVC) & Visit Approval for Type 1 or Type 2 Visits

For educational visits on Evolve, the EVC is the first line approver for all educational visits. Following first line approval by the EVC the completed Evolve record is submitted to the Headteacher for final approval. At any stage in this process the Evolve record can be returned to the staff member planning to visit for amendment or correction.

For adventurous activities or overseas educational visits, following first line approval by the EVC, the Evolve record is reviewed by the Head teacher for approval. Once approved by the Head the Evolve form will go through to the appointed Outdoor Learning Manager (RMBC/ LCC) for their approval and advice. The role of the Outdoor Learning Manager (RMBC/LCC) is to provide advice only and responsibility remains with the Headteacher.

6 – Roles and Responsibilities

Visit Leaders

Visit Leaders are responsible for the planning of their visits, and for entering these on EVOLVE (where required). They should obtain outline permission for a visit from the Headteacher or delegated member of SLT prior to planning and committing to any course of action. Schools with access to EVOLVE+ must use this function. Visit leaders have responsibility for ensuring that their visits will comply with all relevant guidance and requirements. Visit Leaders are responsible for ensuring that full authorisation for the visit has been obtained, that staff have the relevant level of competence and the Trust Medical Policy has been followed.

Visit Leaders are responsible for obtaining fully completed provider statements from external providers and uploading these to the EVOLVE record. Visit leaders should not upload external provider risk assessments to EVOLVE records.

Visit Leaders should ensure that any admission costs, transport costs and charges to students are identified as part of the planning process.

When producing a list of students attending the educational visit, Visit Leaders must cross reference this list with Bromcom to ensure that any student who has a flag for an additional need, such as SEND or a medical condition, is identified and this need is specifically addressed in risk assessments for the educational visit.

Visit leaders are responsible for cross referencing the list of students with Bromcom and any other source of information that relates to photograph consent. Visit Leaders must ensure that photograph consent is fully considered and accounted for during the preparation and delivery of the educational visit. All staff attending at the Educational Visit must have a list of students shared with them to identify which students the school does not have photograph consent for, alongside the list of students with medical needs.

All Other Staff

All other staff on educational visits need to understand the purpose of the visit and have read and understood any visit plans and risk assessments. They need to be able to supervise students and

ensure their safety during the visit. All staff are responsible for deleting any draft records of proposed educational visit records that are abandoned in the planning stage.

Volunteers

If the Visit Leader intends to include the use of volunteers in the visit, they must ensure they are following the school's Safeguarding Policy and are aware they must not take photographs of the students. A separate Volunteer risk assessment should be completed by Headteachers for volunteers in schools.

Educational Visit Coordinator (EVC)

The role of the EVC is to quality assure all educational visit planning, support and challenge colleagues and be a first point of contact. In addition, the EVC is able to offer advice, guidance and support to staff planning educational visits. In primary schools the EVC will usually be an appointed person from the Trust central team, in secondary schools the EVC will be appointed by the Headteacher. For educational visits on Evolve, the EVC will provide first line approval for visits, prior to passing them to the Headteacher or designated member of SLT for final sign off.

The Educational Visit Coordinator is responsible for monitoring draft and submitted (but not yet approved) records on EVOLVE, making specific reference to the proposed date of the educational visit. The Educational Visit Coordinator must raise these records to the attention of Headteachers and Visit Leaders when an educational visit is due to occur in the following 5 school days. This communication must be via email. This is to serve as an extra safeguard against educational visits occurring without full approval on EVOLVE.

The Educational Visit Coordinator must return any forms where risk assessments have not been fully adapted to be suitable and appropriate for the specific visit. This includes completing the sections 'alternative arrangements', 'emergency planning' and 'sharing of the risk assessment'.

The Educational Visit Coordinator is responsible for ensuring that when they send back any EVOLVE record for further work by the Visit Leader, they document clearly on the record the standard wording 'the visit is not approved and cannot go ahead at this point'. When returning a visit form, the Educational Visit Coordinator should tick the required boxes to alert the Trip Leader and Headteacher.

Educational Visit Coordinators are responsible for keeping up to date with LA updates and changes in legislation and statutory guidance and sharing this information with Headteachers.

The Headteacher/Designated Member of SLT

The Headteacher must cross reference the list of students included on the EVOLVE record with Bromcom. This is to ensure that any student who has a flag for an additional need, such as SEND or a medical condition, is identified and this need is specifically addressed in risk assessments for the educational visit.

The Headteacher/Designated Member of SLT will ensure that:

- The group leader has experience in supervising and controlling the age groups going on
- the visit and will organise the group effectively
- The group leader has relevant skills, qualifications and experience if acting as an

- instructor, and knows the location of the activity
- All supervisors on the visit are appropriate people to supervise children and have appropriate clearance
- Where use of Evolve is required, this record is comprehensive and accurately completed
- Responsible for ensuring that the Visit Leader follows all aspects of visit preparation, including all relevant permission checks, safeguarding and SEND requirements

The Governing Body

The Governing Body's role is that of a 'critical friend'. Individual Governors may request 'read-only' access to Evolve.

The Local Authority

The local authority is responsible, via Evolve, for offering specialist advice and guidance on all visits that are either overseas, residential, and/or involve an adventurous activity. Final sign off for these visits will remain with the Headteacher.

Volunteers

Volunteers are responsible for following safeguarding procedures and the Code of Conduct, including the use of mobile phones, cameras and social media.

Duke of Edinburgh's Award Visit Leader

Visit leader competence must be approved by the Educational Visits Coordinator, with advice sought from Local Authority Outdoor Education Adviser as necessary.

Measures of competence include:

'Normal Country' - meaning rural lowland, enclosed farmland and fields. This category does not include moorland, mountain and being more than 30 minutes from a road and / or above 600m. Qualifications include (but not limited to):

- Sports Leaders UK Level 3 Certificate in Basic Expedition Leadership
- Lowland Leader
- Local Authority local DofE Leader Assessment
- Hill and Moorland Leader
- Summer Mountain Leader
- WPT route specific assessment

Remote / Wild Country. In addition to evidence of recent and relevant experience in type of terrain to be walked, one of the following qualifications must be held:

Moorland areas UK: Hill and Moorland Leader Award

Mountain areas UK: Mountain Leader Summer

Where the Educational Visit Coordinator is unsure what is required, they must make the requisite checks with the Local Authority Outdoor Education Adviser.

7 – Staff Competence

WPT recognise that staff competence is the single most important factor in the safe management of visits, and so we support staff in developing their competence in the following ways:

- An apprenticeship system, where staff new to visits assist and work alongside experienced
- Visit Leaders before taking on a leadership role
- Supervision by senior staff on some educational visits
- Support for staff to attend training courses relevant to their role, where necessary

In deciding whether a member of staff is competent to be a visit leader, the Headteacher/designated member of SLT will take into account the following factors:

- Relevant experience
- Previous relevant training
- The prospective Leader's ability to make dynamic risk management judgements, and take charge, in the event of an emergency
- Knowledge of the students, the venue and the activities to be undertaken.

8 – Behaviour

Appropriate behaviour is essential for the smooth running of learning beyond the classroom activities and ensures that effective memorable learning can take place. Young people, parents and carers will be made aware of the code of behaviour, expectations of young people and sanctions which may be invoked should the code be breached. In addition, parents and carers will be made aware of their responsibilities for removing/collecting young people in prescribed circumstances. Reference should also be made to the School Behaviour Policy.

9 – Communication with Parents/Carers and Gaining Consent

A school must always get written consent for nursery age children. For children over nursery age, written consent is not needed for most educational visits, as they're part of the curriculum. However, parents/carers must be informed about all educational visits.

Written consent is usually only needed for educational visits that:

- Need a higher level of risk assessment
- Are outside normal school hours

Even when written consent is not required, schools must tell parents about these educational visits and give them the opportunity to withdraw their child.

Details that may be included in the communication to parents/carers about the educational visit:

- Nature and purpose of the visit and intended outcomes
- Voluntary contribution or cost (which should be the total, fully inclusive through PARENTPAY) and how to pay
- Date
- Departure and return times
- All locations to be visited
- What resources or clothing/footwear a student is required to bring
- Arrangements for those entitled to free school meals
- Emergency contact details

Where a financial contribution is required from parents, permission must be sought.

Where the student is over 18 years of age, they are able consent to educational visits.

Template letters which must be used for communicating with parents and gaining consent are found in Appendix D.

10 – Access to Important Information During Educational Visits

In preparation for each educational visit a pack of important information should be prepared and taken on the visit. This pack can be either digital (Evolve+ or accessed via Google Drive) or physically printed, if digital access is unavailable. This information should include:

- Student names and emergency contact details
- Relevant student medical information (including allergies)
- Relevant dietary information
- Any relevant paperwork to accompany medicines
- Contact details for senior leaders at school, include mobile telephone numbers for contact out of school hours
- Tickets and copies of itinerary, including any maps and guides
- Copies of any relevant risk assessments
- Photo consent - cross referenced with Bromcom

Any printed or physical copies of information taken on educational visits should be disposed of securely in line with GDPR.

Educational visits that include time outside of regular school hours require additional planning. For example, it is unlikely that a parent would be able to successfully contact the school outside the hours when there is a person physically in the office to answer the school phone. Staff on the educational visit also need to be able to directly contact parents/carers during the visit. Consideration also needs to be given to how students will arrive at a pick up point or travel onwards to their own home at the end of the educational visit. This may include students needing to travel outside of daylight hours and may require additional clarification and permission from parents.

11 – Contingency Planning

An important part of planning for any trips involves planning for emergencies and unexpected events. By having continuous access to contact information for parents, school leaders and any other key people, contingency planning is much easier. Staff who are on the trip need to be able to let relevant parties know if they are delayed, if a student has become ill, if a student is exhibiting dangerous behaviour or if the visit needs to be cancelled. Similarly, should a student become ill or an educational visit need to be ended early, risk assessments need to account for this. Reference should be made to the school critical incident policy and emergency planning procedures.

12 – Ratios and Effective Supervision

As part of the planning for educational visits, it is important to understand what staff to student ratio is required and to consider how the needs of the specific students participating in the educational visit may affect this.

Except in Early Years, where the ratio for under 5 years is 1:4, the law does not prescribe activity-specific staffing ratios. However, it does require that the level of supervision and group management is 'effective'. Effective supervision should be determined by a risk assessment that takes account of:

- The nature of the activity (including its duration)
- The location and environment in which the activity is to take place
- The age and gender (including developmental age) of the children and young people to be supervised
- The ability of the children and young people (including their behavioural, medical, emotional and educational needs)
- Staff competence

As a starting point for consideration, rather than being a definitive, as they may be appropriate only where the activity is relatively straightforward and the group has no special requirements the following ratio is recommended for day visits:

- School years 1-3, 1:6
- School years 4-6, 1:10/15
- School years 7 onwards, 1:15/20

Residential visits:

- A minimum of two teachers or adults
- One teacher or adult for every 10 students (six pupils for school years 1-3)
- Mixed gender groups should, where possible, have at least one male and one female teacher.

13 – First Aid, Medication and Additional Needs

At least one member of staff with an appropriate and in date First Aid certificate must be included on each visit. You will need to base first aid needs on the type of activity and number of students on the

visit, for further guidance please refer to the School Health and Safety Policy. Once the list of students attending has been finalised, their medical needs must be considered and arrangements put in place to account for these during the educational visit. This preparation should include the staff member in school responsible for administering First Aid on a day to day basis. For any students with significant medical needs or needs that require access to medication throughout the visit, a specific risk assessment must be completed within Evolve as part of the educational visit record. Similarly, if a student has mobility needs, a specific risk assessment would be needed to account for this. Each school office should have a fully stocked First Aid kit available to take on educational visits, this should be collected and checked by a First Aider before departure.

For overseas visits where a child or young person with a known medical condition is to be in a group where staff are not fluent in the language of the country being visited, then appropriate information should be translated and readily available to be given to the medical services in the event of an emergency.

When planning residential education visits, it is important to note that students are not permitted to take paracetamol or other pain killers on their person. This must be clearly articulated to parents/carers and students as part of any written or verbal information distributed prior to the visit. Visit Leaders must clearly reflect this in their risk assessments on EVOLVE. This must then be checked by the Educational Visit Coordinator and Headteacher as part of their respective sign off.

At the point of departure on educational visits, the Visit Leader must ensure that students are asked if they have any paracetamol or other pain killers. These must be handed in to staff before the trip leaves and placed in a safe place, these can be returned to parents/carers at the end of the trip.

Visit Leaders and Headteachers are responsible for ensuring that the Trust's Medicines & Medical Policy must be followed during the educational visit. This includes ensuring that the use of all systems, procedures and forms that are in use in school under the policy have their use replicated on the educational visit.

It may be useful to download one of the following applications to assist with visit planning and deliver:

- CitizenAID
- What3Words
- St John's Ambulance First Aid

14 – Travel and Transport

All educational visits will involve a form of travel. This can range from a short walk from the school to a local site of interest, to the use of transport such as buses and aeroplanes. Travel arrangements should be finalised as early as possible in the planning process.

All transport requests should go through the Trust Transport Team. This includes if the request is for an external company, as the Transport Team will have access to appropriate and pre-approved providers.

For type 2 and type 3 educational visits, there is a template risk assessment for travel ('GRA2 Travel' template) within Evolve.

Use of Private Vehicles

- At Headteacher's discretion
- Driver confirms that business insurance is in place and the vehicle is roadworthy. The Trip Leader must see proof of business insurance
- Seatbelts worn at all times
- Child car seats used as appropriate – children under 12 years of age or 135cm tall (whichever comes first) require the appropriate care seat, or, if over 125cm tall, a booster seat
- Permission obtained from parents
- Luggage to be packed in such a way as to ensure any items cannot be thrown forward from the boot
- Child safety locks and window locks to be used as appropriate

15 – Charging

Headteachers and activity must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996.

Refer to DfE Guidance document: [Charging for School Activities](#).

16 – Finance

Once you have completed the initial planning, you will need to gather information regarding costs of the trip.

- Will transport be needed?
- Cost of venue/activity. Is a deposit needed?
- Value for money and cost effectiveness
- Will parking be needed, is there a charge?
- Is accommodation needed?

Once all purchasing information has been gathered, dependent on the purchasing arrangements in place at the school, purchase orders must be completed and sent to the Trust Finance Team orders@wickersleypt.org or requisitions raised on the Trust finance system. The Trust Finance Team will place these orders following sign off from the relevant budget holder.

All receipts need to be collected and returned to the Finance Team.

The Trust has insurance cover for most types of educational visits. However, if the educational visit involves adventurous or overseas activity, a request should be put in to the Operations Team to check that cover is in place for this specific activity operations@wickersleypt.org. On high costs educational visits, such as those overseas, it is important to consider if additional insurance cover needs to be purchased for eventualities such as cancellation or date changes.

17 – Training & Staff Development

As part of the services provided to WPT by Rotherham Metropolitan Borough Council, WPT has access to the Outdoor Education Advisers' Panel (OEAP) National Guidance. In addition, WPT also receives updates on significant changes to guidance from Rotherham Metropolitan Borough Council's Outdoor Learning Manager.

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To ensure that each of the WPT Educational Visit Coordinators maintain a level of competence required for their role, they should access the Rotherham Metropolitan Borough Council 'Educational Visit Coordinator training'. This must be completed at least once every three years.

Regarding the development of staff who will lead or assist on educational visits, it is important that less experienced staff are able to build up their confidence, knowledge and expertise by assisting and shadowing before leading visits. Staff should feel able to seek guidance and assistance from the Educational Visit Coordinator and Headteacher when preparing to lead visits. Supporting and assisting staff is an important part of the Educational Visit Coordinator role.

To raise awareness of the policy and to educate staff on how to plan an educational visit, staff should have access to a briefing session during Autumn 1, where the planning and delivery of educational visits is covered and the key points of the policy are articulated. It is essential that a member of SLT attends these meetings to keep up to date.

It is envisaged that staff will then have access to the Educational Visit Coordinator throughout the academic year, as and when support is required.

For those staff who will lead or assist on Educational Visits involving outdoor adventurous activities, specific reference must be made to section 6 of this policy to understand the training and qualifications required.

18 – Monitoring, Evaluation and Review

The Trust will review this policy and assess its implementation and effectiveness. The policy will be promoted and implemented throughout all schools.

This policy is linked with other policies on:

- Behaviour policy
- Safeguarding policy
- Medicines policy

Appendix A

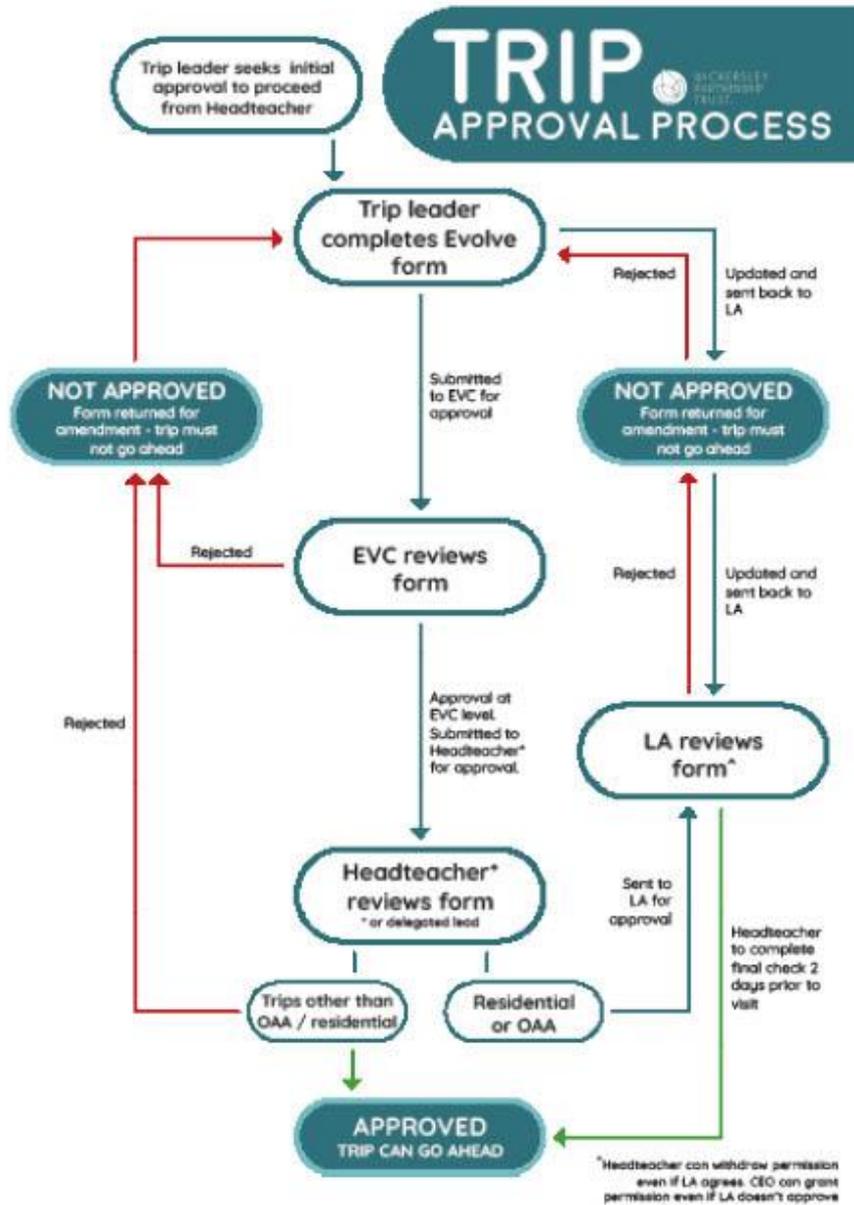
Type 0 Planning Aide Memoire

Area of Planning	Considerations
Visit Type	Referencing the policy, ensure that the visit does fit in the category of 'Type 0' visit before proceeding.
Visit Plan	Have a complete plan of the visit, including travel arrangements, an understanding of the venue, activity to be completed and local conditions.
Level of Approval / Awareness in School	<p>Consider if the visit needs approval from Headteacher/Line Manager/Head of Department and who needs to be aware of the visit, e.g. catering, cover, etc.</p> <p>Ensure that any staff or department in school are aware of the students absence from school site and visit details, e.g. attendance.</p>
Communication with Parents / Carers	<p>Even if no parental permission is required, the details of the educational visit should still be communicated to parents /carers with at least 48 hours' notice, so they have the opportunity to read the information, ask questions and withdraw their child, should they wish to do so. The Visit Leader must ensure that they have accounted for any parental authorisations or withdrawals.</p> <p>The communication with parents/carers should include:</p> <ul style="list-style-type: none"> • Details of the visit such as date time and location • The intended outcomes • The total cost if any to be incurred by the parent/carer, (anything with a cost to parents/carers would need prior permission from them) • Travel arrangements including where students will be collected and dropped off • Any resources students would require such as appropriate clothing and footwear • Arrangements for lunch if required including for those students who receive free school meals • Emergency contact details
Ratios and Effective Supervision	<p>Understand the staff to student ratio required for the type of visit. Always consider the specific needs of the students that will be participating. See section 12 of this policy for further guidance.</p> <p>Ensure that staffing competency and experience matches needs.</p> <p>The Visit Leader must ensure that a list of students is taken on the visit and securely disposed of at the end of the visit.</p>
Risk and Contingency Planning	<p>Ensure that you understand risk assessments, plans and local arrangements in place at the venue. On Trust premises, these will likely be familiar to staff and students, but this may not be the case elsewhere.</p> <p>Ensure that there are contingency plans in place if the visit need cancelling at short notice, aborting when in progress or if a student needs to leave the educational visit early.</p>

	<p>Ensure that contact with the school is possible at all times via mobile telephone.</p> <p>When travelling to other Trust sites there will already be risk assessments in place for those activities and premises. When using Trust transport, there is an existing risk assessment in place. Although these risk assessments have been carried out by someone else, it's recommended that you familiarise yourself with them.</p> <p>Student information will need to be checked including SEND and safeguarding information (including photo consent), and where applicable individual risk assessments created.</p>
First Aid and Medical Needs	<p>Ensure that there is appropriate first aid cover on the visit and at the venue (if required).</p> <p>Ensure that there is a process in place to check every student's medical needs. Arrangements need to be in place to take copies of Individual Health Care Plans and any medication on visits. Ensure that any medical conditions or medication that requires specific training, e.g. Epipens and epilepsy, are safely planned for.</p> <p>The Trust's Medicines Policy must be followed.</p>
SEND and Safeguarding	<p>Ensure that every student's SEND and safeguarding needs are checked and considered are part of planning for the visit, including photo consent.</p>

Appendix B

Flow Diagram of the Evolve Process



Appendix C

Provider Statement for Educational Off-Site Visits and Activities

FOR COMPLETION BY PROVIDERS AND TOUR OPERATORS OF EDUCATIONAL VISITS AND ACTIVITIES
FOR ESTABLISHMENTS WITH ROTHERHAM MBC SERVICE LEVEL AGREEMENT

This form is designed to help the Visit Leader/establishment confirm that a provider meets required standards

PART 1: To be completed by the Visit Leader

Establishment/School	
Email	
Visit Leader	
Visit Leader	
Date(s) of visit	

PART 2: To be completed by the Provider

Provider - please give careful consideration to the following statements and respond with YES, NO or N/A, or give the specific information required. If you hold a valid Learning Outside the Classroom (LOtC) Quality Badge, you need complete only Section A and the Confirmation.

SECTION A - to be completed by all providers

1.	Learning Outside the Classroom Quality Badge	Yes, No or N/A
1.1	Do you hold a Learning Outside the Classroom Quality Badge?	

2.	Data Protection	
2.1	Do you comply with the General Data Protection Regulations (GDPR)?	
2.2	Will the terms of the contract with the establishment include an outline of how any personal data the establishment shares with you will be shared, used, stored, secured and eventually deleted or returned?	

2.3	Do you accept that you may only take or use photographs of participants with the establishment's specific permission?	
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3. Waivers		
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3.1	Do you guarantee that the establishment, the participants or their parents/ carers will not be required to agree any waiver which seeks to limit your liability for death or personal injury?	
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4. Coronavirus		
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4.1	Do all venues and or activity arranged comply with current COVID-secure guidance with measures in place to minimise the risk of infection?	
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SECTION B - to be completed by all providers (not holding Learning Outside the Classroom Quality Badge).

5. Insurance		
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5.1	What is the expiry date of your Public Liability Insurance which will be current during the proposed visit and activities and which covers all directly provided and sub-contracted activity?	
5.2	What is indemnity limit?	£ Million

6 Health & Safety and Emergency Policies		
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6.1	Do you comply with relevant health and safety regulations, including the Health and Safety at Work Act 1974 and associated regulations, and have a written health and safety policy and recorded risk assessments which are available for inspection?	
6.2	Do you have accident and emergency procedures in place, with records available for inspection?	

7. Vehicles		
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7.1	Are all vehicles to be used roadworthy, and do they meet the requirements of regulations in the country in which they will be used, and EU regulations on passenger seats and seat restraints?	
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8. Staffing		
8.1	Are staff who have access to young people checked for relevant criminal history and suitability to work with young people?	
8.2	Are there regular opportunities for liaison between your staff and visiting establishment staff?	

9. Accommodation		
9.1	Does UK accommodation comply with current fire regulation requirements of the Regulatory Reform, (Fire Safety) Order 2005?	
9.2	Have you inspected all overseas accommodation to be used to confirm that it meets legal requirements of the country concerned, that it has fire safety and security arrangements equivalent to those required the UK and are records of these inspections available?	
9.3	Are there security arrangements in place to prevent unauthorised persons entering the accommodation?	
9.4	Are separate male and female sleeping accommodation and washing facilities provided?	
9.5	Is visiting staff accommodation sufficiently close to young peoples' accommodation for adequate supervision?	
9.6	Will all young people have an individual bed to sleep in?	

10. Subcontracting		
10.1	Will you subcontract any services? (e.g. activity instruction, transport, accommodation)	
10.2	Where any element of provision is sub-contracted, do you ensure that each sub-contractor meets the relevant specifications outlined in the other sections of this statement, and are records of checks of sub-contractors available for inspection?	

SECTION C - to be completed if the visit contains taught or instructed activities of any sort

11. Adventure Activities (complete if any activities are licensable under AALA)		
11.1	What is your AALA Reference Number and expiry date?	
11.2	Does the licence cover ALL planned activities, which are in the scope of an AALA licence?	

12. Activity Management (complete for all taught or instructed activities)		
12.1	Do you have a policy for staff recruitment and training & assessment which ensures that all staff with a responsibility for participants are competent to undertake their duties?	
12.2	Do you maintain a written code of practice for all activities which is consistent with National Governing Body guidelines and, if abroad the relevant laws and regulations of the country concerned?	
12.3	Do you confirm staff competence by appropriate National Governing Body qualifications for the activities undertaken, or have staff had their competence confirmed by an appropriately qualified and experienced Technical Adviser?	
12.4	Where there is no National Governing Body qualification for an activity are operating procedures, staff training & assessment requirements explained in a code of practice?	

12.5	Will participants have access at all times to a person with a current appropriate first aid qualification and staff practised & competent in accident and emergency procedures?	
12.6	Is there a clear definition of responsibilities between your staff and visiting staff regarding supervision and welfare of participants?	
12.7	Is all equipment used in activities suited to the task, adequately maintained in accordance with statutory requirements and current practice, with records kept of maintenance checks as necessary?	

SECTION D – to be completed by tour operators

13. Tour Operators		
13.1	Do you comply with the Package Holidays and Package Tours Regulations 1992, the Foreign Package Holidays (Tour Operators and Travel Agents) Order 2001 and the Package Travel and Linked Travel Arrangements Regulations 2018 including bonding to safeguard customers' monies?	
13.2	Please provide details of bonding (ABTA, ATOL etc) with reference numbers and expiry dates	

SECTION E – to be completed if the visit includes an overseas expedition as defined in National Guidance document 7q "Overseas Expeditions" OEAPNG

14. Overseas Expeditions		
14.1	Do you comply with British Standard BS8848:2014?	

SECTION F – to be completed by all providers

15. Accreditation	
15.1	Please provide details of any relevant accreditation with reference numbers and expiry dates

DECLARATION – to be completed by all providers

I confirm that the details given above are correct, and that our organisation will give prior notification of any significant changes that might adversely affect the safety and wellbeing of user groups.

Signed			
Named			
Provider Name			
Address			
Tel:			
Fax:			

Thank you for completing this form, please return the completed form to the establishment/school named on page 1.

Appendix D

Template Letter to be used for Educational Visits which Require Consent

Class / Year _____ will be going on a visit to _____ on _____.

The visit leader will be _____ and students will be travelling by WPT minibus (or full details of WPT approved coach - ensure this is booked through WPT Transport Team). All relevant Trust risk assessments have been completed. The Educational Visit and Learning Outside the Classroom Policy can be accessed via the school website.

The purpose of this visit is to provide students with the opportunity _____. (If there is additional information attached to the letter, state this).

The trip will depart at _____ and return at _____.

[One of the following two paragraphs should be included, depending on whether this is a trip within school hours]

- As the trip is in school time, in case of emergency please contact the school office.
- As the trip includes periods of time when the school office is closed, in the case of emergencies during these periods, the emergency out of hours contact number is _____.

Students will require ___ (refer to lunch /drinks / snacks). Students will be expected to wear uniform/ non uniform and have suitable footwear and outdoor clothing. Students will be / not be permitted to bring money for small purchases such as _____. The maximum amount of money a student should bring with them is _____.

(School name) expects students to behave in an appropriate, sensible manner and to follow the school code of conduct at all times. We reserve the right to refuse access to the visit for students who do not meet the acceptable criteria.

[One of the following two paragraphs should be included, depending on whether this is an enrichment or entitlement activity]

- As this an enrichment activity, in order for the activities to take place we ask for a voluntary contribution of _____. All payment is at the discretion of parents/carers and any contribution will be viewed as voluntary. However, in the event of an inadequate number of contributions being received, it will not be possible for the visit to take place.
- As this part of the curriculum entitlement there will be no contribution required **OR** As this is part of the curriculum entitlement there will only be a voluntary contribution towards... Travel, popcorn, ice-cream, etc.

If your child requires access to medication whilst on the visit, and school does not currently have a record of what is required and when, it is the responsibility of the parent to inform the school prior to the visit is due to take place and the school medicines policy must be followed.

[Include a paragraph on if there is going to be any further information provided or QA sessions put on
- usually for residential or more complex trips]

[If payment is needed, include the following "Please make your payment via ParentPay and sign and
return this slip."]

I, give permission for _____ to attend the educational visit.

If you have any further queries, please contact _____ on _____ or via email at _____.



APPENDIX E

Educational Visit Planning Checklist for Visit Leaders

The following checklist is intended to guide a Visit Leader through the practical process of planning an educational visit. The checklist is an appendix to the 'Educational Visits & Learning Outside the Classroom Policy' and should be read in conjunction with the policy.

Recognising that there are a wide range of educational visits, some of the items on the checklist may not be applicable to all visits across all schools.

Please note that in secondary schools, EVOLVE+ has the functionality for the Visit Leader to obtain outline approval for visits in advance of completing a full EVOLVE record. This is to stop a Visit Leader planning the whole visit only to realise at the end of the planning process that, for example, there are exams scheduled for the day of the visit or the school diary is already on that day. Visit Leaders do not need to do anything different to use this functionality, as it is built into the EVOLVE process. This functionality allows for those who need to be aware of the initial planning of a visit (Cover, Exams, First Aid, Headteacher, etc) are made aware and give their go ahead to the full planning of the visit. Before using the checklist it is important to note that all educational visits need to be put on EVOLVE **at least 6 weeks in advance of the date of the visit.**

Visit Name:

Visit Leader:

Early stages of planning – PRIOR to 6 weeks before the visit

Please note that even experienced Visit Leaders may not have the answer to each question below and it is important to liaise with colleagues, both in the school and wider Trust. For example, issues involving finance (01709 807600 / orders@wickersleypt.org), first aid, cover arrangements and transport (transport@wickersleypt.org), will all require contact to be made with other people. The Educational Visit Coordinator is available to offer assistance at each step in the process – although please remember that the responsibility of planning the visit remains with the Visit Leader.

Purpose of visit and dates

- Check the school and Trust calendar.
- Use EVOLVE+ to alert the people in school who person in school who need to be aware of the initial planning of a visit, e.g. Cover, Exams, First Aid, Headteacher, etc (secondary schools).
- Consider the purpose of the visit and if this is entitlement or enrichment. If the visit is for 'entitlement' then every student has the opportunity to attend and there is no compulsory cost. This will have a significant impact on who attends the visit and how it is funded. This element of the visit planning is crucial and needs signing off on by the Headteacher.
- Consider which students the educational visit is open to. This will be linked to the purpose of the visit and if a decision is made that numbers are limited (any visits with limited numbers cannot be classed as 'entitlement') the Visit Leader should consider who in school decides on that criteria (this may be the Headteacher or a member of SLT). Alert that person and ensure the decision is made as early as possible.

Staffing the Visit

- Produce a list of proposed staff. Consider needs of the students, complexity of the visit and ratios within the policy.
- Decisions on which staff are to attend the visit must include staff experience, teaching commitments, cover and purpose of the visit, e.g. in secondary schools, if the visit is a geography field visit then geography specialists will be required.
- Where a trained first aider is required, ensure that the staffing of the visit meets the requirement set out in the policy.
- Where the visit includes adventurous activity, ensure that the staffing of the visit meets the requirement set out in the policy.

Costing

- Ensure the full cost of the visit is calculated. It is important to include who will pay for the visit, including if students are being asked to contribute.
- Ensure that transport is fully considered. If Trust minibuses are not being used, ensure that external transport is booked via approved providers. Schools can book their own transport after establishing via the Transport Manager (transport@wickerslept.org) who the approved external providers are.
- If Trust minibuses are being requested, ensure that this is done as far in advance as possible. Establish if Trust drivers are being requested as well or if school staff will be driving.
- Ensure that the 1.275% been added on to the visit cost to cover ParentPay fees.
- If you are requesting that any portion of the cost is covered by other budgets, ensure that the budget holder is alerted and is able to make a decision.

Following outline approval of visit by Headteacher

- Once outline approval has been given, ensure that any venue, activity or event that requires booking is promptly booked.
- Write letter for parental permission / notification (consult policy for what educational visits require parental permission and for template letters). Ensure that whoever is signing the letter checks this prior to it being sent.
- Ensure that the letter to parents has a deadline for replies and payment, and includes information on how to make payment (where applicable). It is important to make clear what constitutes a parent successfully reserving a place on the visit, e.g. can they simply request a place, or does payment need to have been received to confirm the place.
- If using google forms to send to parents, ensure that those without easy access to this medium are not disadvantaged, e.g. on a first come, first serve basis, consideration needs to be given to communication.
- When parents are asked for permission they should always be prompted to provide details of any medical or health needs, including medication they will require. This ensures that the school have the most up to date information possible at the time of the visit. The same must be done with emergency contact names and telephone numbers.

SUBMISSION - 6 WEEKS PRIOR TO VISIT

*****FULL EVOLVE RECORD TO BE SUBMITTED AT LEAST 6 WEEKS IN ADVANCE OF THE EDUCATIONAL VISIT INCLUDING ALL RISK ASSESSMENTS*****

Planning – 4 weeks before educational visit

- Consider text or email reminders to those involved in the visit, especially if they are required to plan for the visit. If the visit included an element of student selection or first come, first served, have you told parents their child has a place?
- Send out or revisit permissions and notifications to parents, as well as tracking what parental payments have been received (if applicable). Make a decision in advance on who is responsible for chasing outstanding permissions and when will the cut-off be.
- Ensure that a briefing is prepared for all students and staff who are attending on the visit and those staff who are remaining in the school, but still require knowledge of the visit – this will include sharing risk assessments, contingencies and itineraries.
- Ensure any enquiries from parents or students (or wider staff in school / Trust) reach the Visit Leader. If the Visit Leader has delegated someone else to be point of contact, this needs to be clearly communicated.
- You must ensure that plans are in place for all students with additional needs (this will have been part of the risk assessment process on EVOLVE). The Visit Leader will need to work with colleagues such as the First Aider, and potentially, SENDCo, to ensure that practical steps are in place for the visits, e.g. how will medicines and individual healthcare plans be collected, transported, administered and returned?
- Create a visit folder. This should be done on google drive to allow it to be shared with all relevant staff and, if required, to be printed and taken on the visit. Ensure that there is a way of confirming that all staff have read and understood this information, e.g. via email confirmation. This folder should be available to key staff remaining in school, such as SLT and admin staff. This folder will include:
 - Register of students
 - Details of additional SEND, medical, behavioural needs for students, and subsequent plans
 - Emergency contact information
 - Risk assessments
 - Itinerary
 - Student groupings and staff responsibilities
 - Maps
 - Details of any check-in points through the day, including method of check-in and location of check in
 - Details of meeting point and time and drop off point and time
- Arrange for a first aid kit to be available via First Aider. Do not plan to take a first aid kit that is required in school.
- Confirm final number with the venue, as well as confirming any activities or events (remember that staff will likely count in numbers for venues).

Planning – 2-3 weeks before educational visit

- Liaise with the school cook / kitchen, to ensure that plans are in place for students who are eligible for free school meals. This needs arranging with the cook so that students can choose meals and these meals are available to collect and take on the day of the visit. They may need you to complete a form for this purpose.

- Check the itinerary for any learning resources and work books that are required on the visit.
- Revisit permissions and notifications to parents (including photo consent), as well as tracking what parental payments have been received (if applicable).
- Track confirmations that staff that are required to have confirmed that they have read the visit folder contents.

Planning - 2-3 days before educational visit

- Consider if text / email reminder is needed for parents and students regarding the details of the visit and what is required to be taken on the day.
- Final check with First Aider that the most up to date medical needs and list of medication is complete.
- Check tide times (if appropriate).
- Check weather forecast.
- Ensure school 'trip mobile' is available and charged and consider, based on the ages of students and the activities planned, if students need this number on the day of the visit, so that a staff member is contactable at all times for students during the visit. If the visit is out of school hours, one of the 'trip phones' should remain with a staff member at school to ensure that there is a point of contact for parents.
- Ensure that any risk assessments (or component parts of risk assessments) are shared with students, unless this is to be done on the day of the visit.

Planning – day of educational visit

- Final check of visit folder and that printed and electronic copies are shared and stored with the correct staff.
- Final check of parental consent (including photo consent) for those visits requiring parental permission.
- Collect school meals for those students eligible for free school meals
- Collect and check medicines and individual healthcare plans
- Collect and check first aid kit (if required)
- Collect sick bags and rubbish bags
- Collect trip mobile
- Ensure that any risk assessments (or component parts of risk assessments) are shared with students.
- Ensure that attendance (secondary) are aware of which students have actually left on the visit.

Planning – following the educational visit

- Ensure that any confidential information taken on the visit is either returned or securely disposed of.
- Ensure that any behaviour incidents, safeguarding incidents or accidents / near misses, are reported to the relevant people and recorded on the relevant management information systems.
- Complete any feedback forms required.
- Debrief with staff involved to identify successes and learn any lessons that are useful for future educational visits - PLEASE ENSURE THAT LESSONS ARE SHARED ACROSS THE TRUST TO HELP IMPROVE OUTCOMES FOR STUDENTS AT ALL SCHOOLS – school EVC, Headteacher or Senior Operations Manager can be conduit for sharing any learning

