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EDUCATIONAL VISITS POLICY

NOVEMBER 2026

Policy Date: November 2026
Review Cycle: Annual
Responsible Body: Conyers LGC

Version Control

Review Date	Updates
V1 February 2025	Review of legislation and guidance
V2 November 2026	Review of legislation and guidance, update of format

Lowfields Avenue, Ingleby Barwick, TS17 0RJ

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Introduction

Well planned and well conducted visits and residential experiences form a recurrent and important part of the curriculum within The Trust. Visits form an important learning experience for children and can make a lasting and positive impact on personal and social development as well as consolidating and enhancing their knowledge and skills. Evidence of the curriculum enrichment provided by visits beyond school is demonstrated by enhanced self-esteem, behaviour, confidence and life aspirations.

All activities beyond school contain an element of risk. The effective management of these risks is essential in maintaining enjoyable and successful visits. Every consideration shall be given to ensuring that significant risks are identified and assessed with practical measures taken to mitigate against those risks and effectively manage residual risks with proportionate control measures.

Educational Visits Co-ordinators, Visit Organisers and Supervisors will consult this document and National Guidance published by the Department for Education, Health and Safety on Educational Visits and the national lead body for outdoor education, The Outdoor Education Adviser's Panel to ensure the currency of advice during the planning, preparation, implementation, monitoring and reviewing of both day and residential trips to ensure a culture of constant improvement.

Copies of all guidance and forms are kept in the relevant folders on both the Staff Shared Drives.

Educational Visits Organisers must be familiar with its contents, with key issues are summarised below.

Key Personnel

Educational Visits Coordinator (EVC): Jo Croft

Visit Organiser (VO): Jo Croft

Local Authority Contact: Derek MacDonald

Aims

Our aim is that all visits from school should be safe, educational, enjoyable, inclusive and offer equality of opportunity and diversity to all groups of pupils/students in school.

Day and residential visits should provide opportunities for children/students to experience a wide range of activities. The variety of 'real-life' opportunities experienced on visits enables children/students to achieve a fuller understanding of the world around them through direct experience. It is important that children learn to understand and manage the risks that are a normal part of life.

Planning a visit

Educational visits should have a clearly defined educational purpose as part of the school curriculum. It may be that a visit provides an effective stimulus at the start of a unit of work, alternatively, teachers may decide to use an educational visit at any time during a project to enhance and support the curriculum.

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Wherever or whatever the venue, teachers should ensure that the educational benefits to the children/students are maximised.

The organisation of an educational visit is crucial to its success. With rigorous planning, organisation and control, a visit should provide a rich, learning experience for the pupils/students. Whether the visit is to a local park, museum, swimming pool, or involves a residential stay, it is essential that careful planning takes place. This involves considering the risks which may arise and making plans to avoid them.

Gaining Approval for a Visit

Stage 1 - Member of staff planning a visit to liaise with VO to complete electronically the 'Application for the approval of Educational Visits' form (Appendix 1) and discuss with EVC/SCP the proposed visit. This discussion should take place as far in advance of the visit as possible.

Issues to discuss will include:

Is it a new visit

- Reasons for the visit
- Preliminary assessment of likely risks
- Impact on normal curriculum
- Costs including arrangements for covering absent staff

Stage 2 - EVC to decide 'no' or provisionally 'yes'.
If 'no', feedback will be provided.
If provisionally 'yes', move to stage 2.

Stage 3 - VO to inform LA and receive comments (abroad, dangerous and residential only).
VO and staff member to produce formal risk assessments.
VO to make provisional bookings. Buses should be arranged through the school office and insurance, if required, through the school's Risk Protection Arrangement (RPA) Insurance Policy.

Stage 4 - EVC & VO to review risk assessments and, if the visit is a residential, request comments / approval from the governing body and LA Health and Safety team. EVC & VO to decide yes or no.
If yes move to stage 4.

Stage 5 - VO to make actual bookings.
Staff member to draft letter/communication for parents.
Staff member to hold parents meeting (if appropriate).
VO to issue and collect student consent forms.
Staff member to confirm cover arrangements with the Personnel Officer.

Stage 6 - VO & EVC to confirm contact procedures

Stage 7 - Visit takes place

Stage 8 - VO to review visit and risk assessments (post visit).
Termly: EVC to provide governing body with a list of authorised visits.

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Designated Safeguarding Lead

The designated safeguarding lead and/or a deputy should always be available during school times and any off-site activities, for staff to discuss any safeguarding concerns.

Being available, may be via social media, MS Teams, Zoom or a mobile phone. A record of the concern plus actions taken should be made on CPOMS by the appropriate persons.

Inclusivity

The Equality Act 2010 defines several protected characteristics and it may be illegal to discriminate against someone displaying any of these characteristics.

The Trust shall therefore make reasonable adjustments to include those with any special educational, medical needs or protected characteristics, entitling them to participate.

Any decision to exclude someone should not be taken lightly, and only after consultation with those who have responsibility for them or are involved, such as the headteacher, visit leader, class teacher, SENCO, parents, support staff, a third-party provider, GP or social worker.

If a child/student is excluded from a visit or activity for good reasons, consider providing them with a suitable alternative.

Staff should also consider the impact of exclusion on them, and the wider implications such as on attitudes and relationships across the establishment.

Any adjustments that are made to include an individual should not impinge unduly on the planned purpose of the activity. For example, it may not be appropriate for a parent to accompany a child on a residential visit where a planned outcome of the visit is developing independence.

However, it may be possible to find a different activity which will achieve the same purpose, and which is accessible to all.

Exclusion for behaviour

Behaviour is not one of the protected characteristics defined by the Equality Act. It may therefore be acceptable to exclude someone from an activity or visit if their potential behaviour presents a significant, unmanageable and unacceptable risk to the health, safety or welfare of either themselves or others, or to the successful completion of the activity or visit.

However, if the behaviour is associated with a protected characteristic, great care should be taken to ensure that unfair or illegal discrimination does not take place.

Please refer to the Outdoor Education Advisors' Panel OEAP Guidance 3.2e for further details.

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LOtC Quality Badge Holders (Learning Outside the Classroom)

The LOtC Quality Badge underpins the Government's Health & Safety on Educational Visits Guidance. As LOtC Quality Badge holders have been quality assurance checked, there should be no need to acquire copies of the host provider's risk assessments before the visit.

Running the Visit

Enjoyment of the visit will depend not only on the planning, but also on the efficiency with which the actual visit is conducted. The following advice could be helpful where relevant:

- allocate seats, adults should be able to keep watch on the whole party;
- stow luggage carefully;
- ensure that all passengers stay in their seats while the coach/min-bus is moving and fasten their seat belts throughout the journey, where they are provided;
- allocate a number of children/students to each adult and make sure they are all briefed on behaviour and medical needs;
- children/students should be briefed about expectations for behaviour and conduct.

  Where appropriate this may include signing a Code of Conduct Agreement;
- make convenient toilet and refreshment stops;
- ensure there is a First Aid kit on each vehicle;
- take plastic bags for litter;
- ensure that medicines for children/students are taken on the visit and procedures for administering them are followed;
- ensure that the risk assessments for travel to/from and at the venue are taken and that all adults are fully briefed;
- if walking, plan the route to ensure safe pedestrian routes and road crossings.

At a venue, camp or centre run by a provider or resident wardens, the rules and procedures of the centre must be strictly adhered to. To this end all members of staff should be briefed and, if the visit is a residential, a copy of the rules posted in the dormitories/bedrooms.

Parents should know as precisely as possible the estimated time of return to school. If there is likely to be a delay the emergency contact procedure should be activated.

An evaluation of the success of the visit should be made. Final accounts should be prepared and checked for auditing. The Headteacher should be advised of any behaviour/discipline problems.

Keeping Accounts

A special account for activities should be used in consultation with Finance. This should allow for money to be paid in at intervals and for the money for each visit to be separately accounted for.

Organisers should:

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- Inform parents what the full amount required is.
- Inform parents what deposit is required and when, and indicate if the deposit is returnable or non-returnable. State cancellation procedure.
- Establish what amounts he/she is willing to pay – complete Payment Agreement if required.
- Make clear the instalment dates and the final date for payment.
- All monies received to be processed through Arbor for each pupil/student.
- Keep a note of expenses and obtain receipts.

Visits Using Travel Companies

Organisers using a travel company should be looking for the following:

- Reliability - the company should be well known and reputable, be licensed through ABTA and ATOL and have the organisation and facilities to offer 24 hour support.
- The 'right product' - convenient flights, picking-up points, modern coaches, etc.
- The 'right price' - reflecting good value for money in the eyes of the organisers, students and parents.
- A programme full of interest.
- Positive supervision ensuring maximum attention to pupils'/student's safety as well as education and entertainment.
- Minimum administrative load for the organiser.

In particular educational visits organisers should:

- Consider at least three different packages.
- Listen to colleagues' recommendations.
- Try and attend a preview visit.
- Use only companies which are bonded with ABTA to ensure that the group's money invested in the visit is secure.
- For adventure activities, recognition by an appropriate national body is essential.
- Familiarise themselves with the package provider or host information for participants.
- Consider those aspects that are not clear as well as those that are, e.g. what extras might have to be paid for?
- Liaise with the Trust's insurer to clarify if any Exclusions relate to Pandemic cover. In the event of COVID 19 cases or outbreaks impeding a participant's ability to attend or complete a residential trip, participants may have no recourse to financial redress, and this, where applicable, should be impressed upon prospective participants before committing to attend.
- Scrutinise booking conditions.

Preparing to Travel Abroad

This is virtually the same as the preparation required for parties on visits in the UK, e.g. consideration for the purpose of the visit, nature of the party and leaders, safety precautions and local COVID-19 conventions and restrictions applicable at the time.

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It is likely that a longer lead-in time will be necessary for an overseas visit, both for the arrangement of the documentation and collection of money.

The following documents/arrangements must be made:

- Passports and passport or identify photographs - for many countries a collective passport with accompanying identity cards will suffice. If a member of the party drops out at the last moment report this to passport control at the port of departure - do not alter documents.
- A note should be made of the number on individual passports in case of loss.
- Check with travel companies/embassies to see if visas are needed.
- Check travel and accommodation vouchers/confirmations.
- Check insurance documents.
- Check that every participant has access to adequate health care abroad.
- Existing EHIC will remain current until the expiry date on the card, for use within the EU/EEA providing emergency health care with costs attaching. Check Foreign Office guidance for the country intended to visit.
- New applicants will require either a UK European Health Insurance Card (UK EHIC) or a UK Global Health Insurance Card (UK GHIC).
- Check COVID19 inoculation requirements for Country or region being visited.
- Currency needs to be organised well in advance with Finance Office.
- Consent forms should be carried.

It is advised that a folder of the above-mentioned documents should accompany the party.

Guidelines to support the planning and implementation of educational visits

- **Information and consent** - Parents should be given information about the purpose and details of the visit at the earliest opportunity. Consent for local visits is gained as part of the school's registration pack when a child/student first enrols at the school. Further consent is only required should the visit be residential, high risk or outside of normal school hours. Parents will be informed of visits taking place. Should a parent not wish their child to participate in a visit, they should inform their child's teacher or the VO. Parents need to be aware that the staff on the visit will be acting in their place – 'in loco parentis' – and will be exercising the same care that a prudent parent would.
- **Contact and medical information** – Parents are required to keep school informed of contact and medical information, and that this is kept up to date. Prior to a visit the VO will ensure that this information is collated and taken on the visit.
- For **residential visits**, parents will be invited to a briefing session. Special arrangements may be necessary for parents for whom English is a second language.
- **Charging / payment** – it may be necessary for school to request a contribution from parents towards the cost of visits made during the school day. Whilst school recognises that a pupil/student cannot be withdrawn from a visit should a contribution not be made, should insufficient funding be available to finance a visit, parents must be made aware that cancelation could be an option. For some visits, school staff will consider fundraising, or approaching PTA (Parent Teacher Association)/Friends of the

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School for a donation so that costs to parents are kept to a minimum. Residential visits or visits out of school hours will incur a cost to parents.
Pupil Premium Funding may be used to subsidise the cost of contributions or payments for visits to ensure that all pupils/students are given opportunities to participate. Where a contribution or payment is necessary, appropriate notice must be given so that parents can budget accordingly (see Charging and Remissions Policy).

- A **risk assessment** is carried out in advance of every visit to identify hazards, who may be affected by them and the steps needed to reduce the risks to an acceptable level. The risk assessment should also think through "Plan B" scenarios. The Risk Assessment should be discussed with and authorised by the Headteacher. If events change on the day, dynamic assessment based upon professional judgement will direct the necessary additional control measures. It should be signed by all the adults attending the visit. Following a visit, should there have been no incident, these can be disposed of according to the records management policy.
- Wherever possible, a **pre-visit** should be made by at least one member of staff attending a visit to ensure that they are familiar with the venue and that all risks have been identified.
- **First Aid** provision should be considered when assessing the risks of the visit. For most visits, a member of staff with a good working knowledge of first aid will be adequate. The only exception is in the case of EYFS aged children, where there MUST be a current paediatric qualified person in attendance at all times, whether on or off site. A decision based on the risks and children involved should be made for each visit. For adventurous activities and residential trips, there should be at least one trained first-aider in the group. First aid kits should be taken on all visits. If the visit involves splitting into groups, a kit should be taken for each group.
- **Pupil to staff ratios** for school trips are not prescribed in law. Those planning trips, on the basis of risk assessment, should decide the ratios, considering the activity to be undertaken and the age and maturity of the pupils. In practice, the ratio should be determined by a range of factors such as the type of activity, any SEN or medical needs, experience of the staff, venue, transport, and weather conditions.
- Whatever the length and nature of the visit, regular **head counting of pupils/students** should take place. The Visit Leader should establish rendezvous points and tell adults and pupils/students what to do if they become separated from the party.
- Providing **information and guidance to pupils/students** is an important part of preparing for a school visit. Pupils/students should have a clear understanding about what is expected of them and what the visit will entail. Pupils/students must understand what standard of behaviour is expected and why rules must be followed. When attending a residential visit, a pupil 'Code of Conduct' could be useful where staff feel this is appropriate.
- **Behaviour of pupils/students** - Lack of control and discipline can be a major contributory factor when accidents occur. Pupils/students should also be told about any potential dangers and how they should act to ensure their own and other's safety. Pupils/students should be involved in planning, implementing and evaluating their own curricular work and have opportunities to take different roles within an activity. This could include considering any health and safety issues. If there is the possibility that a pupil/student may be excluded from the visit due to behaviour issues, a meeting would be arranged with the Headteacher in advance to discuss concerns and agree what action is to be taken.

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- **Pupils with special educational and medical needs** - The Head teacher will not exclude pupils/students with special educational or medical needs from school visits. Every effort will be made to support them whilst maintaining the safety of everyone on the visit. Special attention will be given to appropriate supervision ratios and additional safety measures may need to be addressed at the planning stage. Medicines taken on visits are done so in accordance with Policy and Procedures for Pupils with Medical Needs.
- **Transportation** – School ensures that transport to and from visits is appropriate, for example only coaches with seatbelts for all passengers are used. Where it is necessary for a member of staff or parent to provide transport, they must demonstrate that they hold the appropriate documentation (driving licence, business insurance, MOT, etc.) and school maintains a record of this. Whenever transporting a lone pupil by car, there should always be another adult to accompany the driver.

Useful advice and resources

The Outdoor Education Advisers Panel.

National guidance for the management of outdoor learning, off-site visits and learning outside the classroom

How will policy be monitored:
Written reports from trip leaders, feedback from staff, analysis of balances of Curriculum visits.

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Appendix 1

TRUST EDUCATIONAL VISIT/EVENT BOOKING FORM

Please use this form to confirm details of any visit or in-school events that incur a cost to parents (e.g. Zoo lab/farm bus). If you have a number of visits that incur a cost, please consider that more notice may be required.

Date of event/Visit			
Return date if different			
All visit letters must be sent out to parents a minimum of two weeks before the event to ensure that sufficient time is given for payment by parent and kitchen are aware of requirements. PLEASE ENSURE YOU INFORM THE KITCHEN			
Destination/ Event name			
Class/Groups involved			
Do you require transport? (to be booked by office)			**Yes/No**
Departure time from school		**Departure time from original destination**	
No of Children		**No of Adults**	
Do you require the venue booking?			**Yes/No**
Venue contact name and number for any queries			
What are the venue charges?			
Are there any other costs? Please state			
Any subsidies? Please state			
Will an invoice be sent or is payment required on the day?			
Will children require packed lunches?			**Yes/No**
Who is your named first-aider?			
Has a risk assessment been obtained from the venue?			**Yes/No**
Do you need any additional Staff? If yes and paid cover is required please give details			**Yes/No**
Are there any other regular events (e.g. peri teachers) due at the same time? Please ensure that these people are advised but please use this space to list any.			
Any other information:			
Staff signature		**Head Signature**	
Date		**Date**	

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FOR OFFICE USE ONLY:			
Visit Code and name			
Bus company booked (attach confirmation doc. if given)			
Bus Cost	£	**Bus Size**	
Venue booked		**Venue paid**	
Costing completed (attach)		**Cost per child**	£
Online payments end date (one week before event)			
No of dinners affected			
No of FSM pack lunches required			
Kitchen signature		Date	
Signature			
Date			

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