



CARLTON
ACADEMY TRUST

Carlton Academy Trust Educational Visits Policy

Approved on behalf of Trustees:

Gareth Logan

Date:

July 2022

Next Review

July 2025

Section One: Overview and Consent

Relevant and meaningful educational visits are encouraged as they help students:

- Extend learning and enrich their understanding of themselves, others, and the world around them.
- Improve understanding and academic performance within subject/s
- Help promote interests, hobbies, and careers within related fields

Links to External Documents

The Trust has formally adopted the Outdoor Education Advisers' Panel (OEAP) National Guidance" to inform this policy. All staff must follow the provisions of this policy as well as OEAP guidance, which can be found online via: www.oeapng.info Where advice differs, this policy takes precedence.

Definitions

Trips and visits are used inter-changeably and have the same meaning throughout this policy.

Scope

There are 2 types of trips: **routine** and **non-routine**

Routine visits typically comprise regular trips within approximately 30 minutes travelling distance from the school. Examples include trips to swimming baths, external educational providers, or other external sites/facilities.

These visits involve no more than an everyday level of risk, such as slips and trips and are covered by Trust/school policies and procedures. They only need a little additional planning beyond the educational aspect of the trip and can be considered as lessons in a different classroom.

Non-Routine Visits: These are visits which are more complex, which are commonly due to:

- Distance from school
- Type of activity
- Location
- Requirement for staff with specialist skills

This means they aren't covered by existing policies/procedures and therefore require extra planning and risk assessment. The scope of this policy deals with these more complex, non-routine visits.

Consent

Trip leaders must obtain consent from **School** and **Parent Carers**, as follows:

School Consent

Trip leaders must gain consent for non-routine visits in two stages:

Stage 1: Informal Approval:

Outline approval is obtained from their:

- Head of School
- Line Manager/Cost Centre Manager (where not Head of School)

In doing this, they must outline the educational rationale, proposed dates and approximate costs. Informal Approval can be either written or verbal according to the wishes of the school.

Stage Two: Completion of Trip Costing Form (see Appendix 2)

This must be completed in liaison with School/Trust finance staff, who will be able to advise as to exact costings and how to request and make student contributions (where relevant).

Stage Three: Initial Formal Approval

Initial formal approval is applied for using the Evolve online trip management system, using details from Stage 2. Once inputted, the Head of School can see the full financial implications of the trip and choose whether to approve it moving to stage 4.

Stage Four: Final Formal Approval

Here further details are entered to Evolve, enabling a full analysis of the health and safety implications of the trip. Following this, the Head of School will either formally approve or cancel the visit.

Residential Visits or Trips Abroad

These follow the same approval route, except that both will require further approval from the Director of Primary or Secondary Executive Headteacher, as appropriate. They will always seek the advice of the Director of Facilities and Compliance when making these decisions.

Actions Following Formal Approval

The trip leader must:

- Inform the member of staff responsible for cover (when cover is required), so that advance arrangements for staff absence may be made.
- Inform school/Trust finance staff so that an account and cost centre can be set up to collect monies from students, expenses set against, etc.

Parental/Carer Consent

Nursery Age Children: Schools must always get written consent for visits (routine and non-routine) involving nursery age children.

For older children, written consent is not needed for routine visits, as they are part of regular curriculum provision. However, DFE guidance deems it good practice to inform parents/carers and therefore should be followed for all school visits. This also presents parents/carers with the opportunity to withdraw their child if they so wish.

It is recommended that schools ask parents/carers to sign the consent form shown in **Appendix One** (or similar) when a student first joins them, thereby providing consent for routine visits throughout their time at the school.

Written consent from a parent/carers is required for all non-routine visits, and a child **must not** attend without this being obtained.

Written consent must contain the following:

- Name of child
- Class/form
- Consent Statement
- Details of medical conditions/dietary requirements
- Emergency Contact Name and Number
- Signed and Dated

An example is shown in **Appendix 3**:

Notice Periods

There should be at least 2-months' notice between initial approval and trip date for all non-routine visits. When there is an overnight stay, residential or visit overseas, at least four months' notice should be provided. The exception to these guidelines is when visits could not have been known/reasonably known within these limits.

Section Two: Planning Educational Visits

Planning must:

- Be based on this policy and associated statutory guidance
- Ensure all staff, volunteers, and students have a clear understanding of their roles and responsibilities
- Parents/carers have been informed and appropriate formal written consent obtained.
- Have quality assurances from any providers to be used, where possible making full use of appropriate national accreditation schemes
- Ensure emergency contact details have been obtained
- Ensure all significant details/aspects of the visit have been provided to parents/carers/emergency contacts covering the duration of the visit.

Using Outside Organisations

Schools using an outside organisation to provide an activity must check they have appropriate safety standards and liability insurance.

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 Quality Badge through the website: lotcqualitybadge.org.uk

If an organisation does not hold the badge, the school must check that they are suitable to use. This includes checks of:

- Insurance
- Compliance with legal requirements
- Health and safety and emergency policies
- Their risk assessments
- Control measures
- Use of vehicles
- Staff competence
- Safeguarding
- Accommodation
- Any sub-contracting arrangements
- Appropriate licensing

The school must make an agreement with them which clarifies what everyone is responsible for. This is especially important when they are taking over supervision of the children.

Adventurous Activities Trips

These typically comprise caving, climbing, trekking and water sports, but may include other activities. They **must** be thoroughly risk-assessed before the trip takes place, considering the age and abilities of the children taking part. Staff managing or leading visits must not decide to add such activities during the trip.

Organisations must have an appropriate licence to provide adventurous activities. Where an organisation holds the LOTC Quality Badge, they should also hold a licence for the activity they provide.

Further details can be found in the following Health & Safety Executive link: [Information for the public - AALA - HSE](#)

Water Sports

When planning water sports, consider the need for instructors and lifeguards. Schools should take particular care when using hotel swimming pools or similar which may not have a trained lifeguard.

Although there are no swimming pool specific health and safety laws, the Outdoor Education Advisers' Panel (OEAP) provides advice when undertaking adventure specialist activities, including swimming.

Trips Abroad

Trips abroad have extra risks and require a higher level of risk assessment. Therefore, schools should make sure any organisation that is providing activities holds the LOTC Quality badge or similar accreditation.

If the trip includes significant risks, such as challenging terrain, going to remote places or extreme climates, follow the guidance provided by the 'British Standards Institution for Adventurous Activities Outside the UK' as the basis for the planning and risk assessment. Organisations used by the school should also follow these standards or have an LOTC Quality Badge to show they operate to these standards.

Schools can also gain guidance through the Foreign and Commonwealth Office's detailed guidance on safer adventure travel and volunteering services: [Gap years, volunteering overseas and adventure travelling - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/guidance/gap-years-volunteering-overseas-and-adventure-travelling)

As well as government foreign travel advice: [Foreign travel advice - GOV.UK \(www.gov.uk\)](https://www.gov.uk/foreign-travel-advice)

What to Do in An Emergency

All trips must have an emergency response plan that covers what to do if a serious situation develops away from school. This must plan for situations where a student has suffered a life-threatening injury or fatality, is at serious risk, or gone missing for an unacceptable period.

Should this occur, the Trip Leader must seek immediate assistance and support from the school Education Visits Coordinator (EVC) and/or Trust Director of Facilities and Compliance. Advice may also be obtained from the OEAP 'Critical Incident Management for Visits' document.

Post-Trip Evaluations and Monitoring

After a trip has taken place, visit organisers should provide formal feedback on any health and safety concerns (incidents; accidents; near misses). These must be formally recorded and emailed without undue delay to the EVC, Head of School and Trust Director of Facilities and Compliance. This enables the school to evaluate whether its planning has been effective and learn from any incidents which have taken place.

EVC's and the Trust Director of Facilities and Compliance will undertake routine monitoring of educational visits, which is completed in accordance with OEAP National Guidance.

Responsibilities

Educational Visits Coordinator (EVC)

All schools must have an EVC who are responsible for overseeing all educational visits. The Head of School must take this responsibility by default if no one else is formally appointed to this role.

The EVC should:

- Be an experienced visits leader
- Have the status to be able to guide the working practices of other staff
- Be confident in assessing the ability of other staff to lead visits
- Be confident in assessing outside activity providers
- Be able to advise Heads of School and trustees/governors in approving trips
- Have access to training, advice, and guidance.

EVC's must undertake initial Visit Leader Training for the role, with refresher training taking place at least once every three years. Further information can be found through the:

- OEAP website
- Adventure Activities Licensing Regulations (2004)
- Health and Safety Executive website

Visit Leaders

Every trip must have a named Trip Leader who are formally assessed as being competent to undertake their responsibilities against the requirements of the OEAP 'Assessment of Competence' guidelines.

To be deemed a competent Visit Leader or Assistant Leader they must be able to demonstrate the ability to operate to the current standards of recognised good practice. OEAP guidance defines a competent activity leader/assistant leader as having:

- Knowledge and understanding of employer policies, systems, and training..
- Knowledge and understanding of the group, the staff, activity, and venue.
- Appropriate experience
- In some circumstances a formally accredited qualification (for example first aid, outdoor/adventurous activities). Original documents must always be obtained to verify qualifications

Other Staff/Volunteers

Staff participating in off-site activities must only be given responsibilities appropriate to their experience and abilities, with careful consideration given to newly qualified and appointed staff.

Risk Management

It is not possible to remove all risks from visits but should be reduced to an 'acceptable' or 'tolerable' level. This process is formalised through a risk assessment, which must be made for every trip. The Visit Leader is responsible for completing the risk assessment and formally recording/reporting any significant findings.

Advice on completing risk assessments can be obtained through the school EVC or Trust Director of Facilities and Compliance who will guide completion to the Trust format. Both staff members may have similar risk assessments, which will help ease the planning burden.

Where necessary, reasonable, and possible visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and provision meet the required standard. Membership of nationally accredited provider assurance schemes help provide this assurance and include:

- Learning Outside the Classroom (LOTC) Quality Badge
- Adventure Activities Licensing Service (AALS) licensing 'Adventuremark'
- Association of Heads of Outdoor Education Centres (AHOEC) Gold Badge
- National Governing Body (NGB) centre approval scheme

Where a provider holds one of these accreditations, there is no need to seek further assurances regarding risk assessments for the activities that the provider is delivering. Where a provider does not hold an accreditation, it is good practice to obtain a 'Provider Statement', whose assurances form part of the contract. Further details of 'Provider Statements' can be found in the OEAP 'Preliminary Visits and Provider Assurances' document.

Supervision

There are no specific statutory activity-specific staffing ratios. Instead, the requirement is that the level of supervision and group management is "effective". In CAT schools the suitable ratio for different age groups is:

EYFS: 1 to 8

KS1: 1 to 8-10 dependent on activity

KS2: 1 to 8-12 dependent on activity

KS3: 1 to 10-12 dependent on activity

KS4: 1 to 12-15 dependent on activity

Exact ratios should be determined in consideration':

- Age
- Aptitudes, abilities, and skill levels for the activities
- Gender split
- Special, behavioural, developmental, or medical needs
- Availability of medical/other assistance
- Nature and duration of the activity
- Time of year and prevailing weather conditions
- Experience and competence of accompanying staff

Adventure Activities Licensing Regulations

The EVC and Visit Leaders must have a basic understanding of statutory guidance relating to adventurous activities as encoded in the Adventure Activities Licensing Regulations from the Adventure Activities Licensing Service (AALS). These provide a regulatory framework to protect children, parents/carers, teachers, and schools when using providers of adventurous activities..

The regulations (and supporting inspection regime) provide a formal process of professional inspection to accredit and ensure providers have effective safety management systems and processes meeting the national standard.

Further advice can be found in the Health and Safety Executive publication: "Guidance to the Licensing Authority on Adventure Activity Licensing Regulations 1996" [.](#)

Transport

Buses and Coaches

The required level of supervision will be determined during the planning and approval stages. Transport in any vehicle must have at least a driver and a supervising adult. Under no circumstances should students be allowed to travel in a vehicle with a lone driver.

Coaches and buses **must** be hired from a reputable company which have:

- Driver(s) who hold a valid and current DBS clearance.
- Suitable seat belts on the vehicle/s to be used
- Suitable child seats and booster cushions for younger children where required. A school may use their own supplies at their discretion.
- Hold a valid and recent risk assessment for school trips

Private Cars

When transporting students in private cars the following guidance **must** be followed:

- The vehicle is roadworthy with valid tax and MOT (where relevant)
- Drivers must hold a valid driving licence and have provided a copy to the Educational Visits Coordinator, and declaration of any road traffic violations with confirmation via the DVLA.
- More than one member of staff is present
- Have business insurance cover, with proof provided to the EVC

Inclusion

Every effort should be made to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender, or religion. If a visit needs to cater for young people with special needs, every reasonable effort should 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.

Insurance

All Trust schools are covered by the Risk Protection Arrangement (RPA) insurance cover whilst on educational visits.

Safeguarding and Student Contact Details

Staff must not enter students' mobile numbers into their personal mobiles. Instead, they should have an information card containing all required contact details, medical categories or similar. Personal mobile numbers must not be shared with students, with students only provided with school mobile phone numbers.

Charges for Educational Visits

Charges may be made for 'Optional Extra Activities' which are defined as::

- Education provided outside of school time that is not part of the National Curriculum, syllabus for a prescribed public examination a student is studying, or part of religious education
- Transport that is not transport taking a student to school or other premises where the student is being provided with education
- Board and lodgings for a student on a residential visit

Any charge must not exceed the actual cost of providing the optional extra activity, divided equally by the number of pupils participating. Therefore, it must not include an element of subsidy for any other pupils wishing to participate in the activity whose parents/carers are unwilling or unable to pay the full charge.

Participation in an optional extra activity is based on parent/carer choice and their willingness to meet these charges. Schools may ask for voluntary contributions, making clear where these are necessary for the activity to go ahead and that they are under no obligation to contribute, and no child will be excluded if they are unwilling or able to pay.



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Appendix 1: Parental Consent Form for Educational Visits and Off-Site Activities

Student Name:

Please sign and date below if you are happy for your child to:

- a) Take part in school trips and other activities that take place off school premises.
- b) Be given first aid or urgent medical treatment during any school trip or activity.

Important Information

The trips and activities covered by this consent include:

- All visits, including residential trips, which take place during the holidays or a weekend.
- Adventure activities at any time
- Off-site sporting fixtures outside the school day.
- All off-site activities for nursery schools.

The organising school will send you information about each trip or activity before it takes place. This will enable you (if required) to inform the school that you do not want your child to take part in any individual school trip or activity.

Parental Consent

Written parental consent will not normally be requested for activities that are part of the school curriculum and usually take place during school hours. Consent will be requested for all other activities.

Medical information

Please provide full details of any medical condition that your child suffers from and any medication they should take during off-site visits:

.....
.....
.....

Name (Parent/Carer):.....

Signed.....

Date.....



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Appendix 2: Trip Costing Form

Trip Costing Form					
To be completed electronically and emailed to finance					
Budget Summary		Summary of Expenses		Trip Details	
Total Expenses		Activity	£0.00	Trip Location	_____
£0.00		Travel	£0.00	Date of Trip	_____
Total Actual Income		Accommodation	£0.00	Number of Students	_____
£0.00		Food&Drink	£0.00	Number of Staff	_____
Balance		Cover	£0.00		
£0.00		Other	£0.00		
		Total	£0.00		
Expenses					
Description	Category	Quantity	Unit Cost	Total Amount	
_____				£0.00	
_____				£0.00	
_____				£0.00	
_____				£0.00	
_____				£0.00	
_____				£0.00	
_____				£0.00	
_____				£0.00	
_____				£0.00	
_____				£0.00	
_____				£0.00	
_____				£0.00	
_____				£0.00	
_____				£0.00	
				Total Expenses	£0.00
Income / Funding					
Description	Quantity	Unit Cost	Total Amount	Budget Holder Signature if applicable	
_____			£0.00		
_____			£0.00		
_____			£0.00		
_____			£0.00		
_____			£0.00		
_____			£0.00		
_____			£0.00		
_____			£0.00		
			Total Income		£0.00



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Appendix Three: Example of Parental/Carer Consent Form

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Child/Student Name:

Class:

I (parent/carers) consent to my child attending the Educational Visit to
XXXXXXXXXX (destination) on XXXXX (date).

Please provide below details of any medical conditions or dietary requirements which we
should be aware:

.....
.....
.....

Please provide an emergency contact name and number for the duration of this trip:

Name Number

Signed:Parent/Carer

Date: