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Creating Excellence Together,  
through a culture of care

# EDUCATIONAL VISITS POLICY



**BRIGANTIA**  
LEARNING TRUST

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## Document Control

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## Review

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June 2024	2	N Bissett	Added example of critical incident form
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## 1. Definition of a visit

For the purpose of this policy, all offsite visits and activities (apart from Work Experience, off-site directions or college placements where the academy is not responsible for transport which are dealt with separately) that are organised and undertaken by the academy are regarded as “educational visits”. Whenever pupils leave the academy site under the direct or indirect supervision of academy staff, they are undertaking an educational visit.

## 2. The value of visits

Brigantia Learning Trust recognises the considerable value of educational visits and outdoor activities which take place beyond the school site. The Trust is keen to encourage and support the development of activities which enhance the learning and development of our pupils.

*In 2022, the DfE (Department for Education) emphasized the importance of learning outside the classroom, highlighting its role in developing essential skills, connecting students with their local environment, and enhancing the relevance of classroom-based learning. The DfE also recognized that outdoor learning can boost children's happiness, health, and social skills. Furthermore, learning outside the classroom can address mental health concerns and contribute to a more positive school culture.*

*Brigantia Learning Trust agree wholeheartedly with this sentiment and recognise and endorse learning in ‘the real world’.*

## 3. Roles, responsibilities and expectations regarding the visits policy

The Health and Safety at Work Act 1974 places overall responsibility for health and safety with the employer, Brigantia Learning Trust.

Brigantia Learning Trust have a set of visits guidelines, protocols and templates for employees to follow, which can be found on the EVOLVE platform within the resources section and the National Library [EVOLVE - National Document Library](#).

### 3.1 Brigantia Learning Trust

**Brigantia Learning Trust has a duty to ensure, so far as is reasonably practicable:**

- the health, safety and welfare of all employees
- the health, safety and welfare of young people
- the health, safety and welfare of volunteers

**Brigantia Learning Trust has a responsibility to ensure that:**

All Category 3 visits including those outlined below have gone through the correct channels within the prescribed timescales before giving final approval as outlined in Category 3 Visits



Flowchart (Appendix 2), including the completion of the Agreement in Principal Form before giving final approval.

- Visits abroad;
- residential visits (*including overnight camping*);
- hazardous locations (*mainly coast/beaches or natural inland waters*);
- adventurous activities (*climbing, sailing, canoeing, abseiling etc.*);
- remote supervision

## 3.2 Employees

**All Brigantia Learning Trust employees have a duty to:**

- Take reasonable care of their own and others' health and safety
- Co-operate with their employers over safety matters
- Carry out activities in accordance with training and instructions
- Inform the employer of any serious risks

## 3.3 Responsibility Chain

1. Brigantia Learning Trust (delegated to CEO)
2. Principal
3. EVC
4. Visit Leader
5. Other employed staff supporting the visit
6. Other adults accompanying the visit
7. Parents
8. Pupils

### 3.3.1 The Principal

The Principal has overall responsibility for the safe planning and execution of all visits, ensuring no visit leaves the Academy without final sign off. This includes ensuring:

- There is an appropriately trained Educational Visits Co-ordinator (EVC), and where appropriate a trained Administrator, in place and to ensure all staff are aware of who these key personnel are.
- The EVC has sufficient time allocated to be able to complete this role diligently.
- Those staff who need it - EVC, Visit Leaders and all staff accompanying visits complete the appropriate training.
- They read and respond to all notes posted on Evolve, give Outline Approval and ensure no visit leaves the academy without final 'sign off'.
- There are notification and approval processes both at academy level and between the academy and Brigantia Learning Trust, ensuring these are always followed – (Appendix 1 and 2).
- Visit leaders follow the guidance provided by the EVOLVE system - and utilise the EVOLVE Approvals Checklist - (Appendix 5).
- Visit leaders work with the DSL to ensure that young people are safeguarded
- Trustees are made aware of any visits requiring Trust approval.



- The academy visits process supports the principles of inclusion as outlined in section 4.11.
- They formally authorise all visits.
- There is access to high quality first aid on all visits (see 4.2 for further clarification) and the arrangements for first aid is clearly identified on Evolve.
- That Visit Leaders (as well as other appropriate staff) are aware of the procedures for Critical Incidents and that Visit Emergency Procedures are in place for each visit and are understood by all staff involved (see Appendix 3).
- That all Category 3 visits are submitted in a timely fashion and an Agreement in Principle application is made to the Trust Executive Team via the Director of Learning – Student Experience (Appendix 4) prior to any visits being booked
- All visits, regardless of level, must be logged and approved via EVOLVE including Local Area visits and sports fixtures.

### **3.3.2 The Educational Visits Co-ordinator (EVC)**

The Educational Visits Co-ordinator has a responsibility to ensure that:

- All visits that take place, regardless of their duration, distance away, or perceived level of risk, are scrutinised through the appropriate approval process, and are recorded on EVOLVE
- Educational visits and activities are approved at the appropriate level before they take place (Appendix 2)
- Sufficient time is allocated to organise visits properly and obtain any necessary approval, parental consent or other relevant information
- They read and respond to all notes posted on EVOLVE
- Assistance is given to Visit Leaders, if necessary, to support them in the completion of visit paperwork and effective use of EVOLVE
- All the relevant issues outlined in visit planning checklists (Appendix 5) are addressed and detailed planning takes place
- Selection and verification of suitable external activity providers takes place before visits are booked (see 4.3 for further clarification)
- There is effective liaison between themselves, the principal and managers, the visit leader, other accompanying adults, parents, pupils, the Trust, the outdoor education adviser and other relevant bodies to ensure adequate planning and supervision of the visit
- Suitable advice is sought about specific issues, such as special medical, educational needs and disabilities, adventurous activities, or venues
- The risk assessment process has been completed effectively, written risk assessments are in place and uploaded to Evolve. When used, generic risk assessments have be adapted to be appropriate to the specific visit that is planned
- Emergency base contacts are organised for all visits and activities
- Accident, incident and near miss reports are completed and submitted as necessary
- Suitable training is provided where necessary for staff to undertake their roles competently
- Where necessary, preliminary visits are undertaken to identify risks



- All necessary policy, standards and guidance is adhered to, including, but not limited to health and safety, inclusion, safeguarding and minibuss policies
- Effective supervision arrangements are in place for all visits and activities, including activities requiring specialist supervision and leadership, which are based on risk assessment
- Effective child protection and safeguarding procedures are in place for educational visits and activities
- The visit leader, principal, parents, pupils, and other accompanying adults know emergency procedures and contacts
- There is adequate first aid provision for the visit which is based on risk assessment and needs analysis
- All parties involved know the important practical arrangements such as pick-up and drop-off times and venues. It may be necessary to have a system to check that groups have returned safely if after school hours
- The post-visit requirements are met, including accident reporting, and activity evaluation.

### **3.3.3 The Visit Lead**

ALL Visit Leaders MUST complete annual VISIT LEADER TRAINING as directed by the Trust EVC

The main duties of the Visit Leader are to ensure that:

- Educational visits and activities are approved at the appropriate level before they take place (Appendix 2)
- The risk assessment process has been completed effectively, and written risk assessments are in place and on EVOLVE.
- Effective judgements and dynamic risk assessments are made in the field and acted upon during the conduct of the visit
- Suitable and effective supervision arrangements are in place for visits and activities which are based on risk assessment, including activities requiring specialist supervision and leadership (further clarification in section 4.1)
- Where necessary, preliminary visits are undertaken to identify risk
- Selection and verification of suitable external activity providers takes place ensuring guidance in section 4.3 is adhered to
- All risk assessments are reviewed and adapted for the cohort where necessary and uploaded to EVOLVE
- Visit planning checklists are used ensuring detailed planning takes place (Appendix 5)
- Accident, incident and near miss reports are completed and submitted on EVOLVE as necessary.
- Emergency base contacts are organised for all visits and activities
- A competent deputy visit leader is appointed where visits either extend beyond the school day or where the numbers of pupils undertaking the visit require additional support
- The visit, venue and activities match the abilities and needs of the pupils, the competence of staff and the educational objectives
- All other staff are aware of their role, all the organisational details and emergency procedures and contacts



- Effective child protection and safeguarding procedures are in place for educational visits and activities
- Suitable first-aid provision is available based on risk assessment and this is outlined on EVOLVE
- The ratio of supervisors to pupils is appropriate for the needs for the group in line with Supervision Guidance 4.1
- Staff and other supervisors have the details of pupils' special educational or medical needs prior to the trip so they can carry out their tasks effectively
- Any planned "free time" for pupils is suitably organised with effective supervision arrangements in place
- For pupils entitled to free school meals, arrangements have been made for these to be provided on the day of the visit

### **3.3.4 Other employed staff supporting the educational visit**

Other employed staff have a responsibility to:

- Adhere to this policy and apply its principles when participating in educational visits
- Ensure the safety of the students is maximised throughout any educational visit or activity
- Liaise with the designated visit leader to understand personal responsibilities and ensure the smooth running of the visit or activity
- Ensure that they are fully aware of any students requiring additional support, including specific medical or special educational needs
- Ensure that they are fully aware of the visit arrangements and requirements to ensure they are prepared in terms of equipment and knowledge of the planned itinerary
- Ensure that any space visited, e.g., a park and playing field, or coach is kept clean and free from litter during the visit.

### **3.3.5 Pupils**

All pupils have a responsibility to

- Follow instructions from staff while on educational visits
- Ensure that they have the necessary equipment or clothing as detailed by the visit leader to remain safe throughout the experience
- Keep pride in their presentation, understanding that they are representing the Academy and the wider Trust whilst on an education visit
- Ensure that, during visits to outdoor spaces, they keep the area tidy and free from litter. This also applies to any vehicles used
- Behave in a manner which matches the ethos of the Trust, and that they follow the behaviour rules as set out in the Behavioural Policy.

### **3.3.6 Parents and Guardians**

Parents and legal guardians have an important role to play in ensuring the success of educational visits and activities. The main duties of parents and legal guardians are to ensure that they:

- Understand the nature of their child's visit including the types of activity, venues, costs, timings and other arrangements





- Attend briefing meetings where necessary to clarify visit and activity details, particularly for residential visits and where adventure activities or hazardous environments or overseas travel is involved
- Provide the academy with any requested information including, but not limited to:
  - emergency contact details
  - up to date medical details
  - and consent for the child to take part in the visit

## 4 Requirements for Educational Visits

This section outlines the practical arrangements that need consideration to implement this policy

### 4.1 Staffing Selection and Supervision Ratios

Except in Early Years education, 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 specific needs of the children and young people which may include their behavioural, medical, emotional and educational needs
- Staff competence

At Brigantia Learning Trust we have expected staffing ratios for all visits

- Academy Years 1 – 3, 1:6
- Academy Years 4 – 6, 1:10
- Academy Years 7 onwards, 1:15

Where a child or young person requires 1:1 support, the member of staff providing this assistance is additional to the above ratios. Within Brigantia Learning Trust Academies, appropriate ratios will be always maintained during day and residential visits.

#### 4.1.1 Residential visits:

For residential visits there is a requirement that the visit is attended by a minimum of 2 teachers or a teacher and another member of Brigantia Learning Trust staff. However, the staff: pupil ratio must also adhere to the following expected ratios:

- 1 teacher or adult for every 10 students (6 students for Academy years 1-3)
- Mixed gender groups must have at least 1 male and 1 female teacher or adult

The Statutory Framework for the Early Years Foundation Stage (March 2021) sets out specific legal requirements for minimum ratios in this age group, which apply both indoors and on outings. ([Early years foundation stage \(EYFS\) statutory framework - GOV.UK](#))



Additional guidance can be found on the OEAP National Guidance website [National Guidance](#) within the following documents:

- 4.2a Group Management and Supervision
- 4.3b Ratios and Effective Supervision

## 4.2 First Aid Provision

When organising a visit, appropriate arrangements for first aid must be made.

- It is an expectation there will always be a First Aider accompanying the visit. However, where this is not possible and the visit or off-site activity is being hosted by a provider, the visit leader must seek confirmation that there is a trained First Aider available at the visit site. This should be logged on EVOLVE.
- Careful consideration should be given to First Aid requirements and individual medical needs of pupils on visits, including any pupils with asthma, diabetes, epilepsy and/or anaphylaxis, and any specific needs relative to the visit.
- A first aid kit should be taken on all visits

## 4.3 Selection and Suitability of External Providers

As part of the overall risk assessment process, the visit leader must take reasonable steps to check that any accommodation (e.g. youth hostel) that is used, and any venues (e.g. castles or museums) that the group plans to visit, are suitable, satisfactory, and acceptably safe. Many organisations now have websites or information packs that provide all reasonable assurances regarding standards.

If the provider does not hold an accredited award e.g. Kaddi or LOtC, the venue must complete the Provider Assurance Form (EV2). This form will request signed, written assurances regarding the venues safety management systems and operating procedures this must be uploaded to EVOLVE.

When planning, the visit leader should, wherever possible, undertake an exploratory visit. This is to inspect and familiarise themselves with the accommodation and venues to be used. This is a compulsory element of completing an EV2.

## 4.4 High Risk Activities and Environments

Leaders who organise visits that involve high-risk activities and environments must be aware that such visits require a greater degree of planning and preparation by virtue of their complexity and unpredictability. Leaders and other supervisors must be sufficiently competent to supervise pupils in the activity/environment. Visit leaders should always plan alternative activities and venues to cater for possible changes in circumstances (e.g. worsening weather or rising river levels), and all staff should be aware of these possible contingencies.

Competence derives from knowledge, experience, training, and personal qualities and may be evidenced by holding the relevant National Governing Body (NGB) award where appropriate. Evidence of competence should be recorded on EVOLVE as part of the Risk Assessment process.



Staff leading Ski Visits must have completed the Snowsport Visit Leader Training. This should be organised through the Trust EVC.

## 4.5 Risk Assessments

The visit leader is responsible for completing all visit specific risk assessments. The individual carrying out the risk assessment process should have the skills, status and competence needed for the role, understand the risks involved, and be familiar with the activity. Where necessary they will seek assistance from the EVC.

The process is as follows:

- Identify the hazards
- Decide who might be harmed and how
- Evaluate the risks and decide on precautions
- Record findings and implement them
- Review assessment and update if necessary

It may be appropriate to use an event specific risk assessment depending on the potential risks of the visit this will of course need adapting to meet the needs of the cohort/and or visit location.

All completed risk assessments must be read by the EVC to ensure all risks have been identified and enough control measures identified and implemented.

All approved risk assessments should be discussed with all staff travelling with the visit to ensure they are fully aware of the risks and controls.

The completed risk assessments must be uploaded on EVOLVE prior to the departure of the visit.

## 4.6 Insurance

Students and staff taking part in Educational Visits and activities are covered by the Risk Protection Arrangement (RPA).

Separate insurance should be taken out for visits and activities not covered by this. If unsure whether the visit/activity requires additional insurance, seek advice from the Trust Senior Compliance and Operations Officer.

For any unforeseen reason the visit is cancelled, the Trust will seek to recover costs from our insurers before any refunds, if applicable, are offered.

The Trust will not accept responsibility for loss or damage to personal items on school visits.

## 4.7 Costings

Every Visit Leader must be familiar with and comply with the Brigantia Charging and Remissions Policy, which among other things outlines what academies can and cannot charge for, by law.

Visit Leaders must ensure that all costs related to the visit are covered before booking the trip, so no unexpected costs are incurred during or after the visit.



## 4.8 Cancellations and Refunds

Every Visit Leader must be familiar with and comply with the Brigantia Charging and Remissions Policy, which among other things outlines when academies can refund parents.

## 4.9 Overseas Visits

**All overseas visits are classed as Category 3** and require Trust approval.

Due to the additional complexity and financial commitment involved with the organisation of overseas visits, staff planning overseas visits should seek outline approval for the visit at an early stage from all the relevant authorities, before parents or the academy make commitments. No booking should take place until you have received authority to do so.

An 'Agreement in Principle' form must be completed and sent to the Director of Learning-Student Experience for Trust approval and all recommendations must be actioned before booking the trip. (Appendix 4)

It is good practice, wherever possible, for the visit leader to make an exploratory visit to a location. If this is not reasonably practicable, then the visit leader should gather sufficient appropriate information and assurances (via website/teacher pack) about the location and facilities.

The level of staffing required for overseas visits should reflect not only the direct supervision needs, but also the contingency plans made for emergencies. It is not uncommon for a member of staff to need to return home early or to accompany a group member to hospital.

All pupils are required to carry a Brigantia Emergency Card for the duration of all overseas visits in case they get lost. The card will provide the details required to help re-unite the pupil with the group.

New organisers of ski visits, overseas expeditions, or other complex overseas visits should obtain specific training and guidance from the EVC before organising a visit. All staff leading Ski Visits MUST have completed the EVOLVE SNOWSPORTS VISIT TRAINING

Foreign office advice must be regularly checked and guidance followed for all visits abroad.

### 4.10 Parent/Carer Information and Consent

All visits must be logged on Arbor with opportunity for parents to give 'Parental Consent'. Parents without access to Arbor should be given paper consent slips to return to the Academy.

Pupils may not travel on any off-site visit without the necessary parent consent form being completed.

For safeguarding reasons. Only the EVC or Principal can allow consent to be given over the phone. Consent cannot be given via text message. In all cases consent must be recorded on Arbor.

The Brigantia Learning Trust 'Blanket Parental Consent Form' can be used to provide blanket consent for students to participate in low-risk, routine off-site visits such as walking to nearby schools, parks, libraries, or other local venues as part of the school's educational provision. This



can also be used to cover students playing in sporting fixtures on a termly basis. (Appendix 6). Even where blanket parental consent has been provided, in all instances, parents/guardians must be informed of the specific details of a visit prior to any visit taking place.

Residential visits (or day visits with any degree of risk involved) require visit-specific consent forms. These forms must include emergency contact numbers for parents (or parentally nominated alternates) during the visit as well as student updated physical illnesses/conditions and mental conditions. For visits that involve water- swimming ability must be confirmed by parents.

Parents and carers must always be informed in writing of the arrangements for any visit their child is involved in. For overseas visits the visit leader must always organise a Parents' meeting in addition to any paper communication. At this meeting, details about the visit are outlined and parents can ask questions.

The visit leader is responsible for checking the medical details on Arbor of all pupils travelling on all offsite visits.

Some students will require an individual risk assessment which are produced with input from the EVC, SEND Team or Safeguarding Team.

All staff supporting a school visit will be expected to attend all parent meetings and staff briefing meetings.

#### **4.11 Inclusion**

Within Brigantia Academies, 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, 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 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. All academies should take all reasonably practicable measures to include all children and young people.

The principles of inclusion should be promoted and addressed for all visits and reflected in establishment policy, thus ensuring an aspiration towards:

- An entitlement to participate
- Accessibility through direct or realistic adaptation or modification
- Integration through participation with peers.

In all Brigantia Academies, every effort will be made to accommodate all children, no matter what their special educational, physical disabilities or medical needs, whilst maintaining the safety of everyone on the visit. This should include consulting parents/carers, outside agencies (for example specialist nurses) and the moving and handling advisor.

It will be the assumption that children with additional needs will take part in the same activities as others or have a similar experience, with reasonable adjustments which have been agreed in advance.

Special attention should be given to appropriate supervision ratios and additional safety measures may need to be addressed at the planning stage.



Separate visit specific risk assessments should be in place for any children with additional needs prior to a visit being approved.

#### 4.12 Staff Code of Conduct

Every academy expects that all adults acting in loco parentis on any academy visit will be mindful of responsible and proper behaviour, so that they are able to always exercise their professional judgement.

The Visit Leader must ensure that all staff are reminded of these expectations whilst on a visit.

#### 4.13 Post Visit Review and Evaluation

The Visit Leader must inform the Principal, EVC (or whomever has been delegated as the school base contact) that the party has returned safely and ensure that all the students are safely collected from or returned to the school according to the arrangements made.

The Visit Leader must complete a brief follow up report (within 7 days), **via EVOLVE for all Educational Visits.**

If any difficulties or minor incidents have occurred on a school visit, the Director of Learning-Student Experience, Principal and EVC and Senior Compliance and Operations Officer must be informed as soon as possible after the visit returns to the academy so that appropriate follow up action can be taken quickly. Records of such events shall be kept securely for future reference.

#### 4.13 Statement

The Trustees and CEO of Brigantia Learning Trust accept their responsibilities under the Health and Safety at Work Act in relation to school visits.

Signed: \_\_\_\_\_ (CEO)

Signed \_\_\_\_\_ (Chair of Trustees)

Date: \_\_\_\_\_



## Appendix 1 - EVOLVE Categories explained

**Category 1** - these visits will be:

- Regular, routine day activities that are organised in and around the locality, usually on foot.
- Regularly repeated visits - can be covered by a block annual consent subject to parents/carers being made aware of every visit, especially any involving a return time outside the normal day.
- On-site activity (excluding adventurous activities listed in category 3).
- Transporting children between multi-site establishments or other local schools/venues.
- Regular curriculum delivery by an off-site provider
- Visits in and around your academy setting on foot (churches, parks, urban centres, sponsored walk) sports fixtures and the annual sports day (involving transport).

These visits should be planned using the EVOLVE system local visits risk assessment and with approval by the EVC and Principal.

Where there are local activities that are a planned part of the curriculum/routine programme the Visit Leader is still required to sign out before departure, leaving relevant information with the identified academy contact.

The specific establishment off-site visits risk assessment (that may also include road transport) covers general supervision of these visits. For each visit, a review will be required with amendments made to suit the cohort attending the visit. Any additions can be documented using the Event Specific Note form.

**All visits** must be planned and submitted using EVOLVE. Category 1 visits must be completed and submitted via EVOLVE at least **2 working weeks** prior to the visit taking place.

**Registers will be completed in Arbor and the Visit Leader will ensure they always have the visit Smartphone with them. Paper registers will be required in case of lack of signal.**



## Category 2

These visits are:

- Single “one off” day visits; or
- a programme of visits that take place off-site but further afield than your academy and could be annual. These opportunities will usually require transport and could also require some enhanced planning and risk assessment.

Example visits are:

- Visits requiring use of transport (urban areas, theatres, social events, places of interest)
- Fieldwork visits (not in open/remote country)
- Farm visits
- Forest school programmes

These activities will be entered onto the EVOLVE system and submitted to the EVC at least **3 working weeks** prior to departure. Approval is delegated to the Principal and visits should be covered by a parental consent form. For each off-site activity, the Visit Leader must obtain online consent (via Arbor) from parents indicating that information relating to the visit has been received and that they agree to their child’s participation in the event. Where online consent cannot be obtained, they must provide a reply slip. On this same form parents are able to note any changes to the medical information relating to their child.

For a programme of regular visits to similar destinations, one single visit form can be completed, with the relevant dates selected and can be covered by one instance of parental consent. The specific establishment local visits risk assessment (that also includes road transport) will cover general supervision of the visit. For each visit, a review will be required with amendments made to suit the cohort attending the visit. Any additions can be documented using the Event Specific Note form.

If a visit is planned to a higher risk environment, the appropriate Safe Working Procedure document should be reviewed, amended, and completed for your specific visit. This will then be attached to the EVOLVE record, prior to submitting to the EVC and Principal for approval.

Certain activities will require staff to hold specific qualifications or competencies before being able to deliver sessions. e.g., forest school. Relevant qualifications will be added and uploaded to EVOLVE. These activities will not be undertaken unless there is a sufficient number of suitably qualified staff to deliver them.

**Registers will be completed in Arbor and the Visit Leader will have the Visit Smartphone with them a; paper registers will be required in case of lack of signal.**





### Category 3

These visits could include:

- Overseas
- Residential
- Hazardous activities (provider or establishment led)
- Hazardous locations (coastal locations & inland waters)
- Require remote supervision

Approval from the Trust Executive will be required for all Category 3 visits.

An 'Agreement in Principle Form' (Appendix 4) must be completed and sent to the Director of Learning- Student Experience.

For each off-site activity the event leader must obtain or online consent(or reply slip) from parents/carers indicating that information relating to the visit has been received and that they agree to their child's participation in the event. On this same form parents/carers are able to note any changes to the medical information relating to their child.

Overseas visits will be submitted to the Trust **12 working weeks** before a visit is set to take place.

A member of staff intending to lead (as opposed to supervise) an adventurous activity, must be specifically approved by the Trust to do so via the EVOLVE Leader Approval Request function.

When external providers are used it is a requirement for their safety management to have been verified either by completion and return of a Provider Form or verified by holding an appropriate national accreditation, e.g., learning outside the classroom quality badge. Providers will not be used until they have been 'vetted' by the Trust and have appropriate risk assessments.

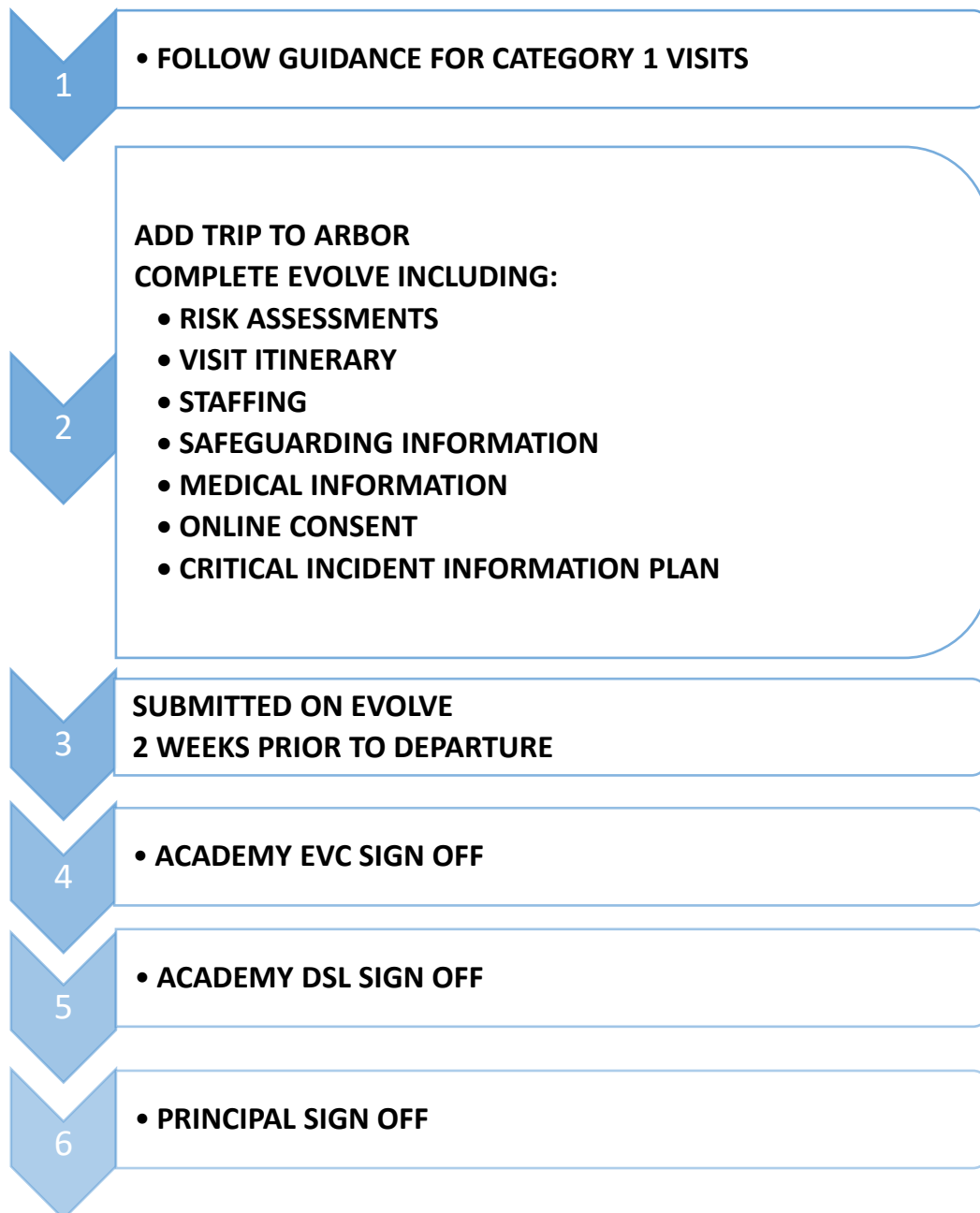
**Registers will be completed in Arbor and the Visit Leader will ensure they always have the visit Smartphone with them. Paper registers will be required in case of lack of signal.**



## Appendix 2

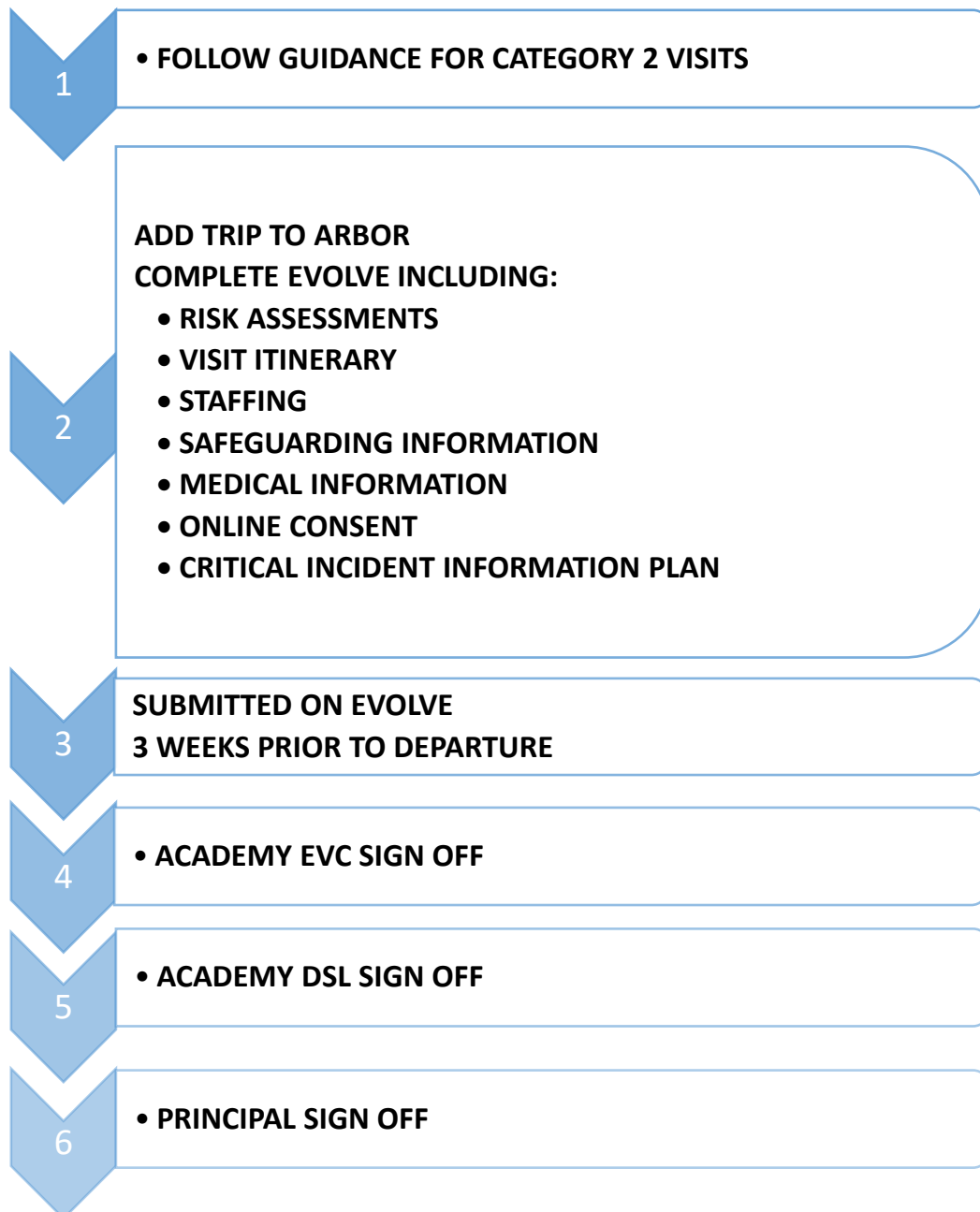
### Category 1 visits flowchart

REGULAR/ROUTINE/LOCAL



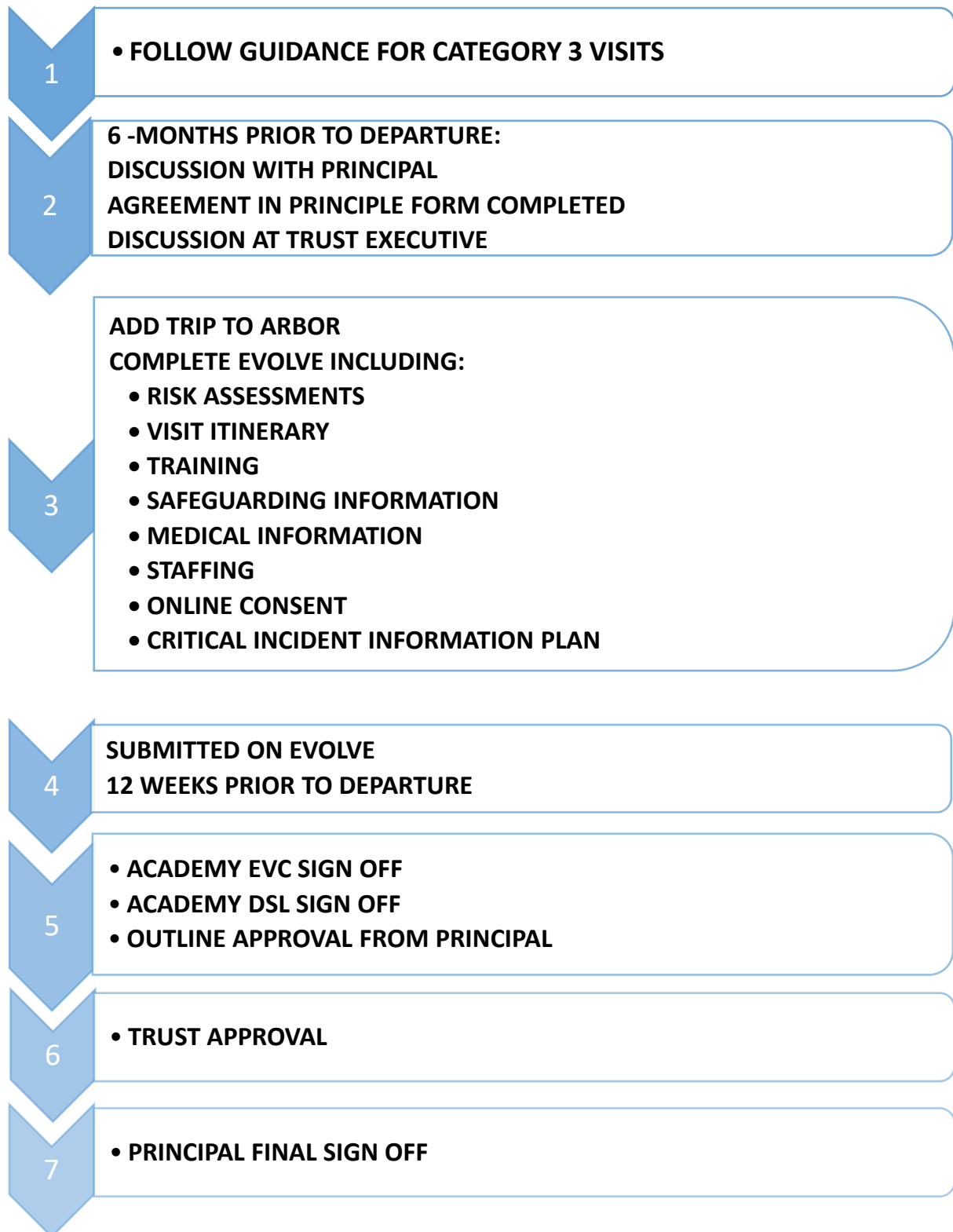
## Category 2 visits flowchart

### DAY VISITS/ANNUAL/ONE OFF



## Category 3 visits flowchart

### OVERSEAS/RESIDENTIAL/HAZARDOUS



## Appendix 3 - Critical Incident & Emergency visit procedures (Example below)

### Emergency response and Critical incident plan

XXXXXXXXXXXXXXXXXXXXXXX

The school's emergency response to an incident is based on the following key factors:

1. There is always a nominated emergency contact for any visit.
2. The nominated contact will either be an experienced member of the BRIGANTIA TRUST EXECUTIVE TEAM, the EVCs, or will be able to contact an experienced senior manager at all times.
3. For activities that take place during normal school hours, the visit team and emergency contact will be aware of any relevant medical information for all participants, including staff.
4. For activities that take place outside normal school hours, the visit team and the emergency contact will be aware of any relevant medical information and emergency contact information for all participants, including staff.
5. The visit leader and the contact know to request support from the local authority in the event that an incident overwhelms the school's emergency response capability, involves serious injury or fatality, or where it is likely to attract media attention.
6. The visit leader(s) will carry a basic first aid kit and all staff on the visit will carry a Brigantia Emergency Card.

#### **In School Hours Contact – Minor incident** (missed transport connection, breakdown etc.)

- Initial contact should be made through the academy SLT Team or BRIGANTIA TRUST EXECUTIVE TEAM depending on the visit. Key details will be recorded via the team.
- The reason for contact could be just to keep the school informed and updated on an issue.

#### **In School Hours Contact -Serious or critical incident**

- Initial contact should be made through the academy SLT Team or BRIGANTIA TRUST EXECUTIVE TEAM. Key details will be recorded via the team.
- The Trust Executive then form a "Critical Incident Response Team" to manage the incident.
- The incident response team will then contact the visit leader and will decide the best course of action.
- The incident response team will provide the BRIGANTIA TRUST EXECUTIVE TEAM with a script for all media and parental enquires.

#### **Out of School Hours Contact – Minor incident**



- Initial contact should be made to the BRIGANTIA TRUST EXECUTIVE TEAM. If unable to contact the team, then contact the Principals then EVCs.
- The reason for contact could be just to keep the school informed and updated on an issue.

#### **Out of School Hours Contact – Serious or critical incident**

- Initial contact should be made to the academy SLT Team or BRIGANTIA TRUST EXECUTIVE TEAM
- The incident response team member contacted should then record key details.
- Incident response member contacts rest of the team. Incident response leader takes control of the situation and contact is established with the visit team. Visit Leader Guidance and Responsibility
- The key responsibility of the Visit Leader(s) is to ensure the safety of themselves and the group.
- Once the group is safe, the Visit Leader(s) should contact emergency services if required and contact the school.
- There should be a dedicated phone number that the school is able to reach the group on
- The Visit Leader can contact the BRIGANTIA TRUST EXECUTIVE TEAM or EVC for advice and guidance if needed.

#### **Incident Team**

- The incident team leaders for this visit are XXXXXXXXXXXX
- The EVCs can act as a tertiary contact if necessary.
- They will become the incident leader if contacted. The incident leader will contact the team required to respond to the incident.



## Appendix 4 – Agreement in Principle Form

Visit	
Date of Proposed visit	
Visit Lead	
Date form submitted	

Rationale
Outline of activities
Accommodation
Information to parents
Costs
Staffing
Student Voice
Approved in principle: Yes <input type="checkbox"/> No <input type="checkbox"/>
Next Steps/Further clarification required:
Date: Signed:



## Appendix 5 – Approvals Checklist

# Approvals Checklist

Use this checklist to ensure all key elements of visit planning have been completed by the Visit Leader prior to approval.



### S

#### STAFFING

- ☐ There are sufficient staff attending with appropriate levels of experience, qualifications, and personal qualities.
- ☐ A Plan B is in place should any staffing or activities change.
- ☐ There is a clear plan for supervision arrangements.
- ☐ Where group numbers are large, staff have been allocated subgroups for the visit.
- ☐ First aid provision has been considered and suitable arrangements are in place.
- ☐ Emergency/critical incident plan and emergency base contacts are in place.

### T

#### TRAVEL

- ☐ If applicable, a reputable transport provider is being used.
- ☐ An outline is provided of expected learner behaviour and supervision arrangements whilst travelling.
- ☐ Procedures identified for service station stops, vehicle breakdown or transport accidents.

### A

#### ACTIVITIES

- ☐ An itinerary is provided for the entirety of the visit.
- ☐ Adventurous activities are correctly identified.
- ☐ Provider-led activities are delivered by LOTC Quality Badge holders and if not, the provider has supplied a satisfactorily completed provider form.
- ☐ School-led activities are led by competent, experienced and, where applicable, qualified staff.
- ☐ The risks involved in school-led activities have been considered in a risk assessment.

### G

#### GROUP

- ☐ Parent letter attached to indicate that parents have been fully informed about the visit and given their consent (if required).
- ☐ Strategies to monitor and control behaviour are clearly outlined.

### E

#### ENVIRONMENT

- ☐ The environmental features of the visit area are considered. For example, procedures for crossing roads, meeting points in busy urban areas, natural terrain hazards (cliffs, rivers, livestock etc.).
- ☐ Water margins have been considered (if applicable).
- ☐ Navigation has been planned.
- ☐ Considerations in place for the time of year, such as, weather, daylight hours, travel consideration, risk of infections, avoiding peak times, costs, clothing and equipment required, availability of certain activities.
- ☐ Accommodation standards have been checked by the provider or visit leader. Security and emergency evacuation has been explained to participants.
- ☐ Where possible the Visit Leader has undertaken a preliminary visit or is familiar with the venue, activities, provider and/or destination.
- ☐ Communications have been considered (e.g. mobile phone reception, access to the internet).

### D

#### DISTANCE

- ☐ Distance from school and emergency services support has been considered. There is a plan for how to get emergency support if needed.
- ☐ If overseas, specific requirements (such as entry requirements, visas, access to medical care, language spoken) have been considered and planned for.

This checklist should be used in conjunction with your Employers Guidance and National Guidance. ([www.oeapng.info](http://www.oeapng.info))

#### CONTACT US

- For adviser support: [advice@evolveadvice.co.uk](mailto:advice@evolveadvice.co.uk)
- For EVOLVE Support: [support@evolveadvice.co.uk](mailto:support@evolveadvice.co.uk)
- [www.evolveadvice.co.uk](http://www.evolveadvice.co.uk)
- 01327 588488

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## Appendix 6 – Annual Blanket Consent Form

This form provides blanket consent for your child to participate in low-risk, routine off-site visits such as walking to nearby schools, parks, libraries, or other local venues as part of the school's educational provision.

Establishment:	
Period of Consent:	

(To be completed by parent/carer)

Name of young person:	
Date of Birth	
Class/Year Group	
Details on any medical conditions/allergies/medications/anxiety related conditions:	

### Consent

I give permission for my child to take part in low-risk, routine off-site visits during the school year. I understand that these visits will be supervised by school staff and that I will be informed in advance of each visit. I confirm that I will update the school with any changes to my child's medical or emergency contact information.

### Emergency Contact Details

Full Name:	
Relationship to Student:	
Phone Number:	

### Signature

Full Name:	
Relationship to Student:	
Sign:	

