



## **Educational Visit Policy and Procedures**

**2026**



## Introduction

The following document provides details of the actions to be taken when planning a school trip, outing, community based activity, and off site activities. This document is adapted from OEAP Employer guidance. All staff planning educational visits must follow OEAP guidance as well as our own Educational Visit Policy. Clarification of any conflict should be sought from the Educational Visit Coordinator (EVC).

## AIMS

To ensure:

1. That risk assessments are carried out in accordance with the school's Health and Safety Policy and Sunderland LA Code of practice for Educational Visits. See Appendix 1.
2. That all visits, events, activities are planned within an acceptable time scale (please see Visit Category for guidance page 4).
3. The safety of pupils and staff whilst on school visits/trips and whilst undertaking activities and events.

## Some key points to consider:

Pupils have many different styles of learning and traditional classroom learning does not suit everyone. A well planned educational visit provides pupils with rich and memorable experiences that expand their horizons build their self-confidence and provide them with a sense of the wider world. When pupils are outside the classroom setting, there is a greater sense of adventure and freedom to explore which encourages pupils to think for themselves and make connections to what they've learnt in the classroom. Pupils often gain new perspectives and understanding of their own potential to learn and discover, making them more motivated when they get back to school.

## INCLUSION & EQUALITY

External visits should be available to all our pupils, regardless of background or ability. The EVC must be informed of any additional funding required for disadvantaged pupils at the earliest opportunity.



## SAFEGUARDING

The planning and preparation of External visits must include measures to safeguard our pupils and accompanying adults from harm.

The nature of visits, especially residential, can lead to particular risks, often linked to accommodation and 'free time'. The planning of visits, including risk assessment should include consideration of safeguarding issues. Visits can also provide opportunities for pupils to disclose to staff. All staff have a responsibility to listen and to take seriously what young people are saying in relation to disclosures and act in accordance with the St Aidan's Academy child protection policy.

## RISK

Risk is a natural part of everyday life and all activities involve risk, and it is impossible to eliminate it entirely. Well managed external visits, including indoor and outdoor adventurous activities play a vital part in helping children and young people to learn about the real world and to understand and manage risks for themselves.

## RISK ASSESSMENTS

Risk management should be seen as a common sense process. It should focus on significant risks and not trivial ones; however, it is a legal requirement for external visits and all work activities.

What is a risk assessment?

A risk assessment is the process which identifies all potential hazards that may be encountered on your visit. It identifies who is at risk, what the risk is, the level of the risk before any control measures and the level of risk following control measures.

The reasons for undertaking a risk assessment and recording it include:

1. Deciding whether to proceed, modify or cancel a proposed visit or activity.
2. Deciding what precautions need to be taken to prevent unnecessary harm.
3. Informing all those involved about the risks and precautions.
4. Providing evidence for those responsible for approving visit.



5. Demonstrating that good practice has been observed in the case of an incident.
6. Manage risks as they occur during a visit.

### **Example:**

Crossing the road is a hazard.

Pupils and staff are at risk.

The risk is being involved in a road traffic accident.

The control measures would be supervision of pupils crossing road/good practice when crossing.

So with crossing the road example above, even though the likelihood of an accident with a car could be judged as unlikely, the worst-case outcome would be a fatality and what you would do to control the risk would need to be stated on the assessment.

The original risk assessments will be retained by the appointed EVC and a copy should be taken on the trip by the organiser. All members of the trip/activity party should be aware of the risk assessment and preferably have taken part in the process of drafting it.

**Useful advice can be found on the following website [www.derwenthill.co.uk](http://www.derwenthill.co.uk) under the Advisory Service section or simply through EVOLVE: Guidance and Code of Practice for Educational Visits.**

### **PROCEDURES**

1. In order to comply with Health and Safety regulations, all trips, visits, events and activities which involve pupils on or off the school site, must be authorised by the Headteacher or member of SLT using the standard 'Proposed External Visit' form available from the Learning Gateway.
2. This form should be submitted as soon as it is known that a trip/visit/event/activity is to be planned (please see visit Category guidance on Page 5). Prior to letters/planning/booking occurs. No provisional bookings are to be made at this stage by the group leader. All bookings will be made by the EVC upon authorisation of the visit.



3. The Headteacher will inform the visit leader, via email, whether or not the visit, event or activity has been approved. The visit leader should then inform the School EVC of visit dates/staff cover requirements for diary information. Only at this stage can the EVC send a letter to parents with information about the visit including; dates, cost, transport, insurance/required documentation and payment plans.
4. If approved, the EVC will be able to offer advice and guidance relating to risk assessments and health and safety. They will also confirm whether your visit is classed as a Category 1, 2 or Category 3 visit and the required timescale for completion.
5. Prior approval for a Category 2/3 visits (i.e. travel outside the UK/adventurous or unusual activities) must be sought from the External Visits Advisory Service, this can be done through EVOLVE. Requests for approval must be sought at least four weeks before a planned visit or longer if the visit is unusual or complex.

**Governors should be notified of all Category 3 visits and a report presented to governors following the visit explaining the experience and benefit gained by pupils.**

6. In addition, it is also expected that all category 1 visits should be entered into EVOLVE before the visit takes place. These visits will still require parental consent. Requests for approval through EVOLVE must be sought 1 week prior to the visit.
7. Sporting Activities during school hours and sporting fixtures will be covered by a generic consent form given to parents at the beginning of year 7 (kept on file with pupil data forms). PE staff are required to post ALL fixtures at least two days prior to the event and inform parents via text to ensure emergency procedures can be adhered to. A mobile phone will be carried by all PE staff during these activities.

Visit category:

### Category 1 visit

Straightforward routine visits defined as Category 1 in a written policy by the school or service concerned, covered by:

- a generic risk assessment, regularly reviewed
  - blanket informed parent/carer consent
  - school/service operating procedures

These include non-adventurous activities which take place during normal school hours. Please check with EVC/Evolve.

Must be authorised by the Headteacher / Manager using Evolve at least one week before the visit, and then approved by the Educational Visits Advisory team of the Local Authority.



## Category 2 visit

Visits requiring enhanced planning with event-specific risk assessment, including:

- All residential visits not in Category 3

Must be authorised by the Headteacher / Manager, using Evolve. This provides automatic notification to the Educational Visits Advisory team of the Local Authority of the visit.

Must be authorised by the Headteacher / Manager using Evolve at **least three weeks** before the visit, and then approved by the Educational Visits Advisory team of the Local Authority.

**Evaluation form must be completed after the visit.**

## Category 3 visit

- Visits outside the UK
- Visits which include adventure activities
- Visits to remote or hazardous locations

Must be authorised by the Headteacher / Manager using Evolve at **least six weeks** before the visit, and then approved by the Educational Visits Advisory team of the Local Authority.

**Must be notified to governing body prior to visit and report presented to governors on return.**

**Evaluation form must be completed after the visit.**



It is recommended that all **category 3 visits are entered onto the EVOLVE system as soon as possible**. The planning should be completed on the EVOLVE system to enable the LA and Derwent Hill to offer expert guidance in completion. All level 3 visits should have a reserve member of staff who has received all required injections/training in case of emergency, this should be recorded on the Visit Request Form.

**Once the visit has been approved by SLT, the following action should be taken:**

1. The Visit Leader must meet with EVC to discuss; Letter to parents, payment plans/cost/transport details and payment schedule. Only the EVC should make bookings for educational visits and determine payment/payment schedules. All reply slips must be collected.
2. Co-ordinate completion of cover forms for all the staff who will be attending the visit and forward to Mrs Whitten.
3. Carry out appropriate risk assessments (guidance and examples are available on the following website [www.derwenthill.co.uk](http://www.derwenthill.co.uk) under the Advisory Service section). The EVC will ensure that all pupils' medical needs (e.g. asthma, diabetes, anaphylaxis) are known and that staff are competent to handle them. All visit leaders will receive all relevant medical information with regards to a child's condition via a copy of the IHCP prior to a visit. The visit leader is responsible for ensuring that the IHCP is followed at all times during a visit and will supervise the administration of all prescribed medication if necessary or requested by parents. Any medication administered should be done in the presence of another staff member and the medical administration form completed (Visit Handbook or Supporting Children with Medical Needs Policy). This form will be handed to Mrs Hogg on return.
4. Visit Leaders should seek the approval from SLT/EVC for accompanying staff, this is to ensure the suitability of the staff who are to attend. Staff training needs to be identified and training needs met before staff can attend.
5. Please refer to Visit Leader Handbook.
6. For Category 2/3 visits your completed Risk Assessment Forms need to be forwarded to your appointed EVC at least 4 weeks before the visit is due to take place as the paperwork must be forwarded to the Advisory Service at Derwent Hill for their approval before the visit can take place.



**Please be aware that failure to have a valid risk assessment in place will mean the visit cannot proceed.**

After the visit

1. Following a Category 2/3 visit you will be asked to complete an **Evaluation Form** by your appointed EVC which will be retained for future reference.  
Future visits will not be permitted if a visit leader has not completed a prior evaluation form.
2. Following all category 3 visits, a report should be presented to governors after the visit explaining the experience and benefit gained by pupils.

## **FINANCE**

### **Charging Policy:**

St Aidan's Charging Policy for all Educational Visits adhere to the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996

### **Charges for Ventures deemed to be statutory requirements:**

No charges are to be made for ventures deemed to be a statutory requirement of the national curriculum, this includes charges for activities and transport, regardless of whether the venture is held in school or non-school time. Any charges should first be clarified with the EVC/SLT link.

#### **These include:**

Any venture undertaken to fulfil requirements specified in the syllabus for a prescribed public examination.

Any venture which is to specifically fulfil statutory duties relating to the national curriculum

Any venture specifically to fulfil duties relating to religious education.

#### **Charges for Ventures deemed to be 'Optional Extras':**

'Optional Extras' are used to describe any venture which does fall in with defined non-school time and is extra to the requirements of the national curriculum.



No charge can be made for non-residential ventures in school time, funding must be on the basis of voluntary contributions. Charges may be made for non-residential ventures in non-school time when the activity is not part of the national curriculum or public examination syllabus.

### **Voluntary Contributions:**

There are no restrictions on seeking voluntary contributions in support of a venture, but they must be genuinely voluntary. Also, it must be made clear to parents that there is no obligation to contribute and pupils must not be treated differently according to whether their parents have contributed or not.

It is necessary to provide written information to parents/carers of the nature of the proposed venture – the educational value and the financial contribution per pupil that would be required if the activity were to take place. It should be emphasised that there is no obligation to contribute and that no pupil will be excluded but it should be made equally clear that the venture will be jeopardised by lack of parental support in the form of insufficient contributions.

There is no limit on the level of voluntary contribution and there is no restriction on the way in which contributions can be used. They can be used to subsidise pupils with lesser means and pay travel/accommodation costs for accompanying teachers.

### **Requirements for Accounting, Banking and Reporting**

A pricing plan is agreed with visit leader and EVC which will include all accommodation, transport, educational costs, including that of all accompanying staff and also any contingency funding. This information is relayed in writing to parents/carers, informing them of a strict payment plan which will relate to the providers' required payments when the initial information regarding the venture is relayed to parents/carers. No booking is to be made at this stage and no deposits to hold bookings are to be made until deposits are secured from pupils. The EVC will communicate all bookings and coordinate the collection of deposits.

### **Payment Procedures:**

After consultation with the EVC, letters will be issued for payment via the Academy App. Parents will be given the option to pay for visits by either cash/cheque to the main school office, or by the Parent Pay system. ALL payments are to be made using the payment procedure to the EVC at the main school office. Payments are not to be taken by individual members of staff.



## Visits on a first come, first served basis:

When visits are defined as first come, first served parents will be firstly notified in writing of the intended venture, including a full payment schedule. They will then be asked to confirm in writing that they would like their child to take part in the venture, but not to include deposits at this stage. Final lists will be forwarded to the visit leader who will authorise pupils on the visit. Deposits of these pupils will then be requested from parents, either by the Parent Pay system or cash/cheque.

## Withdrawal from Ventures:

Parents/Carers will be initially informed that deposits/further payments are non-refundable if the pupil merely no longer wishes to take part in the venture, unless a suitable replacement can be found. When a pupil is withdrawn from a venture by the visit leader then all monies are to be returned to parents/carers.

Any pupil withdrawing from a visit due to medical issues will need to claim through the insurance system, unless a suitable replacement can be found.

## Increasing Costs:

If it is found that a visit rises in price, for example due to rising flight costs, then this can be requested from parents but it cannot be insisted that they pay these costs.

## Banking:

All payments/contributions for ventures will be paid into the school budget and invoices processed in accordance with finance/audit procedures.

Any staff requesting contingency funding must inform the EVC three weeks prior to the visit taking place. All monies must be signed for and receipts retained for records.

If staff require emergency funding during an educational visit the EVC should be contacted via phone. The EVC will arrange credit card details/funding. Again, all receipts must be retained for records.

**St Aidan's Catholic Academy operates under the City of Sunderland's External Visits**



## Policy and Guidance – Code of Practice.

**A copy of this document can be found on the Learning Gateway in the Educational Visits folder.**

**Please note that failure to receive a Consent Form prior to a residential or overseas (category 2 and 3) visit will result in the pupil being unable to attend.**

### Policy Review

This policy document will be reviewed in January 2026

Signed by:

Dr C Emmerson  
January 2027  
Chair of Governors