Cabot Learning Federation

CLF Educational Visits Policy

Date Approved: May 2026
Approved By:
Review Frequency: Bi-annual
Date of Next Review: May 2028

History of most recent Policy changes

Date	Page	Change	Origin of Change e.g. TU request, Change in legislation
Date	E.g. Whole Document	Detail of change	Reason for change
01/05/2026	**Whole Document**	**Creation of policy**	**Formalise guidance into policy**

Contents

History of most recent Policy changes 2

Contents 3

1 Policy Statement 4

2 Equalities Impact Assessment 4

3 Reference to other relevant policies 4

4 Legislation or non-statutory guidance 4

5 Use of EVOLVE (Educational Visits Management System) 5

6 Trip Categories and Approval Procedures 5

7 Roles and Responsibilities 7

8 Risk Management 8

9 Venue / Provider 9

10 Staff Competence 10

11 Inclusion and Equality of Access 10

12 Ratios and Supervision 10

13 Consent and Communication 11

14 Emergency Procedures & Plan B 11

15 Accidents, First Aid, Medicines and Medical Needs 11

16 Behaviour 12

17 Insurance 12

18 Transport 12

19 Data Protection Implications 12

20 Monitoring, Assurance and Review 13

21 Internal forms and templates 14

22 Reference documents 14

Policy Statement

Begbrook Primary Academy is committed to ensuring, so far as is reasonably practicable, the health, safety, and wellbeing of pupils, staff, and others involved in educational visits and learning outside the classroom. Educational visits are recognised as an important element of the curriculum and the wider personal development of pupils and must be planned and delivered in a manner that appropriately manages risk while enabling positive and meaningful learning experiences.

This policy applies to all educational visits and off-site activities organised by or on behalf of Begbrook Primary Academy whether taking place during or outside the normal academy day. This includes local visits, residential visits, overseas travel, and visits involving adventurous or specialist activities. The policy applies to all pupils, staff, volunteers, and others involved in educational visits under the supervision of the academy.

This academy operates within the framework of the Cabot Learning Federation's Educational Visits Policy and adopts the Outdoor Education Advisers' Panel (OEAP) National Guidance as the model for good practice in the management of educational visits and adventurous activities. This guidance informs expectations in relation to leadership, competence, safeguarding, risk–benefit management, and the use of external providers and is implemented locally through academy procedures.

Overall responsibility for ensuring compliance with this policy at Begbrook Primary Academy rests with the Principal. The Principal is supported by the Educational Visits Coordinator and the Cabot Learning Federation Central Health and Safety Team. All staff involved in the planning, approval, or delivery of educational visits have a responsibility to act in accordance with this policy, associated procedures, and the Cabot Learning Federation's health and safety and safeguarding arrangements.

Signed by: ……Vicky Counsell……. Principal

Date ……July 2026……

1 Equalities Impact Assessment

An Equalities Impact Assessment has been carried out. The assessment concluded that there was no adverse impact identified for any groups of people with protected characteristics / or / there was potential adverse impact identified for some groups of people with protected characteristics and mitigations are in place to reduce that impact. The full Equalities Impact Assessment Report can be obtained from [insert name of EIA author].

2 Reference to other relevant policies

- CLF Health & Safety Policy
- CLF Safeguarding and Child Protection Policy
- CLF Behaviour Policy
- CLF Supporting Pupils with Medical Conditions Policy
- CLF First Aid Policy
- CLF Staff Code of Conduct

3 Legislation or non-statutory guidance

- Health and Safety at Work etc. Act 1974
- Management of Health and Safety at Work Regulations 1999
- Education Act 2002
- Adventure Activities Licensing Regulations 1996
- DfE - Health and Safety on Educational Visits

- DfE - Keeping Children Safe in Education
- Outdoor Education Advisers Panel (OEAP) National Guidance
- HSE guidance on school trips and outdoor learning activities
- Learning Outside the Classroom (LOtC) Quality Badge
- Adventure Activities Licensing Authority (AALA) guidance

4 Use of EVOLVE (Educational Visits Management System)

EVOLVE is the Cabot Learning Federation's approved system for the planning, management, and approval of all off-site educational visits. All CLF academies must use EVOLVE to record and process visits in all categories (A, B, and C), ensuring that appropriate scrutiny and authorisation is applied.

All staff leading or supporting educational visits must have access to EVOLVE through their academy account. Any member of staff who is unable to access the system must notify their Educational Visits Coordinator (EVC) without delay.

Some supporting documentation, including trip proposal forms, model parental consent forms, and risk assessment templates, is managed outside of EVOLVE. Where required, these documents must be used alongside EVOLVE and are available in the appendices to this policy.

5 Trip Categories and Approval Procedures

All educational visits within CLF are classified into one of three categories according to the nature of the activity and the level of risk involved. The category determines the level of planning, risk assessment, and approval required.

5.1 Pre Visit

Pre-visits form an essential part of visit planning and risk management and should be undertaken wherever reasonably practicable. They enable staff to assess the suitability of the location, confirm arrangements, and identify any hazards to ensure the visit can be conducted safely. Where a pre-visit is not feasible, particularly for overseas or distant visits, staff must follow OEAP guidance and use appropriate alternative sources of information.

During a pre-visit, staff should, where possible:

- Check access, entry/exit points and emergency procedures
- Identify hazards and appropriate control measures
- Confirm supervision and group management arrangements
- Review key facilities (e.g. toilets, first aid provision)
- Consider transport and arrival/departure arrangements
- Liaise with venue staff to clarify expectations and requirements
- Assess suitability for the specific needs of the group

Where a pre-visit cannot take place, staff must ensure that alternative sources of reliable information are used to inform planning, in line with OEAP guidance.

5.2 Category A Visits / Local area visits

A local area visit is defined as a visit to a location close to the school/academy. These visits take place during the school day and present no greater risk than remaining on site within the academy. Local area visits are closely aligned with Category A visits; further information can be found in the CLF Educational Visits Toolkit.

Category A visits are defined as visits that take place in familiar environments and present no greater risk than everyday activities.

Examples of Category A visits include:

- Local parks
- Museums
- Places of worship
- Theatres
- Nature trails
- Local fieldwork

All Category A visits must be planned and submitted through EVOLVE. They require approval from both the Educational Visits Coordinator and the Principal.

5.3 Category B Visits

A visit which involves activities with increased or less familiar risks. They require additional planning, competence, or supervision arrangements.

Examples of Category B visits include:

- Cycling
- Beach visits
- Orienteering
- Horse riding in non-remote settings
- Fieldwork in upland or coastal areas

Category B visits must be planned and approved through EVOLVE. They must be authorised by the Academy Educational Visits Coordinator and the Principal

5.4 Category C Visits

Trips which involve higher levels of risk.
They may include:

- Residentials
- Overseas travel
- Activities requiring specialist skills, equipment, or environments.

Activities within the scope of the Adventure Activities Licensing Authority (AALA), such as:

- Climbing
- Abseiling
- Caving
- Trekking
- Water-based activities

Adventurous activities not covered by AALA (for example, indoor climbing, canoeing on placid water, or plunge pooling):

Category C visits must be submitted through EVOLVE for review by the Central Health and Safety Team at least six weeks in advance.

- These visits must first be authorised at academy level by the Principal.
- Late submissions may result in delay or non-approval.

The Central Health and Safety Team undertakes termly spot checks of Category A and Category B visits to provide Trust-level assurance on compliance with planning and approval requirements

Further detail on visit categories, approval expectations, and risk-based planning is provided within OEAP National Guidance and associated Trust guidance.

6 Roles and Responsibilities

The Cabot Learning Federation has adopted the Outdoor Education Advisers' Panel (OEAP) National Guidance as the framework for the planning and management of all educational visits and off-site activities. This provides a consistent, proportionate, and high-quality approach to educational visits across all academies within the Trust.

Roles and responsibilities for key individuals, including Principals, Academy Councillors, Educational Visits Coordinators, Visit Leaders, accompanying staff, volunteers, and students, are defined in line with this guidance. Clear allocation of responsibilities is essential to ensure accountability, effective planning, and the safe delivery of educational visits.

Further detail on individual roles is available within the OEAP guidance on roles and responsibilities.

6.1 Board

The CLF Board is responsible for providing strategic oversight and assurance by:

- Approving and reviewing the Educational Visits Policy.
- Ensuring effective Trust-wide arrangements are in place for managing risk.
- Receiving assurance on significant risks, incidents, and compliance trends.
- Ensuring adequate resources, systems, and governance structures support safe practice.

6.2 Academy Council

The Academy Council provides local governance oversight by:

- Seeking assurance that appropriate arrangements are in place for educational visits.
- Monitoring the type, frequency, and nature of visits.
- Ensuring a trained Educational Visits Coordinator (EVC) is appointed and supported.
- Reviewing educational visits through established governance arrangements.

6.3 CLF Central Health and Safety Team

The CLF Central Health and Safety Team provides specialist oversight and Trust-level assurance for educational visits by:

- Reviewing and approving Category C visits following academy authorisation.
- Providing specialist advice on risk management, adventurous activities, and staff competence.
- Undertaking termly spot checks of Category A and B visits.
- Supporting training, guidance, and consistent practice across academies.
- Escalating significant concerns or non-compliance to the Executive Team.

6.4 Principal/Headteacher

The Principal/Headteacher is responsible for operational oversight within the academy by:

- Authorising educational visits at the appropriate level.
- Ensuring effective procedures, timelines, and emergency arrangements are in place.
- Ensuring staff are trained, competent, and suitably qualified.
- Ensuring pupils understand and follow a code of conduct.
- Escalating matters requiring specialist advice or support.

6.5 Educational Visits Coordinator (EVC)

The EVC coordinates and supports educational visits by:

- Ensuring visits are planned, documented, and approved through EVOLVE.
- Advising and supporting staff with planning and risk assessment.
- Checking documentation for accuracy, proportionality, and appropriate authorisation.
- Liaising with Trust teams where required and supporting continuous improvement.

- Completing role specific training on a 3 year basis

The Visit Leader is responsible for the planning and safe delivery of the visit by:

- Completing required planning, documentation, and approvals.
- Leading risk management and supervision arrangements.
- Briefing staff and participants on roles, expectations, and procedures.
- Managing incidents and reporting concerns appropriately.

6.6 Deputy Visit Leader

The Deputy Visit Leader supports the Visit Leader by:

- Being familiar with the visit plan, risks, and emergency procedures.
- Supporting planning and supervision.
- Being prepared to assume leadership if required.

6.7 Accompanying Staff and Volunteers

Accompanying staff and volunteers are responsible for:

- Following the direction of the Visit Leader.
- Supervising pupils as agreed.
- Being familiar with risk control measures and emergency procedures.
- Reporting concerns or incidents promptly.

7 Risk Management

Effective risk management is central to the planning and delivery of educational visits. It involves identifying hazards, assessing risk, and applying proportionate control measures so that the educational benefits of the visit clearly outweigh any remaining risk.

Risk management must follow a structured, benefits-led approach, which includes:

- Identifying the intended educational benefits of the activity alongside potential risks
- Planning to maximise benefits and reduce risks to an acceptable level.

All risk assessments must be completed using the Trust's CLF Trips Risk Assessment (STAGED) - Template.docx

STAGED stands for:

- **S** – Staff: competence, supervision, and leadership arrangements
- **T** – Task: nature of the activity and how it will be undertaken
- **A** – Area: location, environment, and access considerations
- **G** – Group: needs, abilities, behaviours, medical or additional requirements
- **E** – Equipment: suitability, availability, and safety of equipment used
- **D** – Dynamic: ongoing assessment and response to changing circumstances

Risk assessments must be accessible during the visit and retained in line with Trust arrangements.

Visit Leaders are responsible for ensuring that risk assessments are effectively communicated to all accompanying staff prior to the visit and that control measures are implemented in practice.

Risk management is a continuous process, and Visit Leaders must remain vigilant throughout the visit, using dynamic risk assessment to respond to changing circumstances in order to maintain safety while enabling positive educational outcomes.

Further guidance on risk management and visit leadership is provided through **OEAP National Guidance** and associated Trust guidance

8 Venue / Provider

It is a CLF expectation that all academies ensure external venue providers used for educational visits are suitable, competent, and able to deliver activities safely. The level of assurance required must be proportionate to the nature of the visit and aligned with OEAP (Outdoor Education Advisers' Panel) guidance.

For adventurous activities, it is a requirement that providers hold a valid Adventure Activities Licensing Authority (AALA) licence where applicable. This provides assurance that the provider meets nationally recognised safety standards for higher-risk activities.

In addition, CLF recognises it is best practice that venues / providers hold the Learning Outside the Classroom (LOtC) Quality Badge . While not a statutory requirement, the LOtC Quality Badge provides an external endorsement that a provider has met nationally recognised standards for safety, quality of learning, and risk management.

When selecting and approving venue providers, academies must:

- Ensure that any provider delivering licensable adventurous activities holds a current AALA licence
- Give preference to providers who hold the LOtC Quality Badge
- Seek appropriate assurances of health and safety where LOtC is not held, in line with OEAP guidance
- Confirm suitable risk assessments, insurance, and safeguarding procedures are in place
- Record assurances through the EVOLVE system

Where a provider does not hold AALA (where required) or LOtC accreditation, additional checks must be undertaken in line with OEAP National Guidance.

9 Staff Competence

The competence of staff involved in educational visits is a fundamental control measure and is essential to ensuring the safety and wellbeing of all participants.

Staff must only undertake roles and responsibilities for which they are appropriately prepared, trained, and experienced.

Staff competence is determined by a combination of:

- Relevant training and qualifications
- Appropriate skills and knowledge relating to the activity and environment
- Previous experience of similar visits or activities
- The ability to apply judgement and manage risk effectively and safely in practice

Academies must ensure that staff are suitably supported and are not expected to undertake responsibilities beyond their level of competence. This includes access to guidance from the EVC and, where required, additional training or mentoring.

Visit Leaders must be competent in:

- Planning and organising educational visits
- Undertaking and applying risk assessments
- Managing groups and supervision ratios
- Responding appropriately to emergencies or changing circumstances

Staff who are new to leading educational visits must gain appropriate experience before assuming full responsibility. This should include:

- Acting as a deputy or assistant leader
- Supporting visits of increasing complexity
- Receiving guidance and feedback from experienced colleagues or the EVC

The level of competence required must be proportionate to the nature, complexity, and risk of the visit, with higher-risk activities or environments requiring higher levels of experience, training, or specialist qualifications.

10 Inclusion and Equality of Access

Educational visits must be planned to be inclusive and accessible wherever practicable. Reasonable adjustments must be made to support participation and promote equality of opportunity for all pupils.

Planning must take account of individual needs, including medical, special educational, safeguarding, and welfare considerations. These factors must be addressed through appropriate planning and risk management arrangements to support safe and meaningful participation.

11 Ratios and Supervision

There are no fixed staff-to-pupil ratios for educational visits. Supervision arrangements must be determined through a risk-based approach and be proportionate to the nature of the visit, the activities undertaken, the environment, and the needs of the group.

Supervision planning must consider staff competence, group characteristics, and contingency arrangements to ensure effective supervision can be maintained throughout the visit.

12 Consent and Communication

Consent and communication arrangements must be proportionate to the nature and level of risk of the educational visit. Parents and carers must be provided with clear, timely, and appropriate information to support informed decision-making.

Where consent is required, it must be obtained prior to the visit. Effective communication with parents and carers is essential to support trust, safeguarding, and pupil wellbeing.

13 Emergency Procedures & Plan B

All academies within CLF are required to ensure that robust and proportionate emergency procedures are established for all educational visits, in line with OEAP guidance. Staff must be familiar with these procedures and understand their roles before the visit.

A suitable **contingency plan (Plan B)** must also be identified to manage unforeseen changes, such as weather, transport issues, or venue closures.

Academies must ensure that:

- Clear communication systems and emergency contact details are in place
- Staff are briefed on roles and emergency procedures
- Key information (e.g. pupil details, contacts) is accessible during the visit
- A named academy contact is available for the duration of the visit
- A realistic and appropriate Plan B is identified and recorded on EVOLVE

All arrangements must be proportionate to the nature and level of risk of the visit.

14 Accidents, First Aid, Medicines and Medical Needs

14.1 Accident and Emergency Response

Appropriate emergency arrangements must be in place for all educational visits. Planning must include clear communication and escalation procedures to support a timely and effective response to accidents or emergencies.

14.2 First Aid Provision

Suitable first aid provision must be in place and be proportionate to the risks identified during planning. Staff must be prepared to respond appropriately to accidents or medical emergencies that occur during a visit.

14.3 Medicines and Medical Needs

Academies must ensure that all medical needs are identified and planned for in advance of the visit. Appropriate arrangements must be in place to manage health conditions and medications safely, and staff must be informed of any relevant needs.

Particular attention must be given to allergies, including ensuring that risks are minimised and that emergency medication is available and accessible at all times.

14.4 Accident Reporting

All accidents and near misses must be recorded using the Trust's online accident reporting system as soon as reasonably practicable. Where online reporting is not immediately possible, incidents must be reported at the earliest opportunity following the visit. Learning from reported events must inform future planning and risk management.

14.5 Major Accidents

In the event of a serious or critical accident, academies must follow established critical incident procedures and ensure that appropriate Trust leads, and emergency services are informed without delay.

15 Behaviour

Pupils are expected to meet academy behaviour standards at all times during educational visits. Expectations must be communicated clearly in advance and applied consistently.

Behaviour expectations form part of the risk management approach and are essential to the safe and positive delivery of educational visits.

16 Insurance

The Cabot Learning Federation provides insurance cover for authorised educational visits. Visits must be approved and planned in accordance with Trust requirements to ensure that appropriate cover applies.

Activities that fall outside standard arrangements must be identified and addressed in advance.

17 Transport

Transport used for educational visits must be safe, suitable, and appropriately managed. Transport arrangements must form part of the visit planning and risk assessment process and support effective supervision and safeguarding of pupils. Academies must ensure compliance with The driving for work policy found in the Employment Manual V10.1 April 2026.pdf and the CLF Minibus Guidance v9.docx

18 Data Protection Implications

Educational visits require the processing of personal data relating to pupils, staff, volunteers, and parents. This may include contact details, emergency information, and medical or welfare information necessary for the safe planning and delivery of visits.

All personal data must be handled lawfully, securely, and proportionately, with access restricted to those who require it for their role. Information must be shared with third parties only where necessary and retained in line with Trust arrangements.

Systems used to manage educational visits, including EVOLVE, must be used in accordance with Trust expectations for data security. Staff are responsible for ensuring that personal and sensitive information is handled appropriately at all stages of visit planning and delivery.

19 Monitoring, Assurance and Review

Educational visits are monitored at both academy and Trust level to check that they are being planned and delivered in line with this policy and recognised guidance.

Monitoring includes oversight through academy arrangements and Trust-level oversight, review of visit information and incident reports, and regular assurance activity carried out by the Central Health and Safety Team. This includes spot checks of educational visits and related documentation to check that planning, approval, and risk-management requirements are being followed. Any learning from incidents, near misses, or monitoring activity is used to help improve future planning and practice.

This policy will be reviewed regularly and updated as required to reflect changes in legislation, national guidance, or Trust arrangements.

20 Internal forms and templates

CLF staff Toolkit

OE1 Provider Declaration form

OE2 Initial Visit Proposal form

OE3 Parental consent form

OE4 Educational Visits Adult Information form

21 Reference documents

Visit Planning mind map

Visit Planning Flowchart

Visit Leader

Deputy Visit Leader

Educational Visits Coordinator EVC

Principal

Residential

CLF Trips Risk Assessment (STAGED) - Template

CLF Trips Risk Assessment Guidance

SEND