



EBOR ACADEMY TRUST

39. Overarching Educational Visits Policy

Approved by: CEO

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Ebor Academy Trust: One School, Many Sites

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1. Introduction

This policy outlines the overarching principles and procedures for all educational visits undertaken by primary schools within Ebor Academy Trust. It aims to ensure that all visits are safe, enriching, and contribute positively to the learning and development of our pupils, fully meeting the expectations of the Health and Safety Executive (HSE) and the Department for Education (DfE).

2. Policy Statement and aims

Ebor Academy Trust believes that educational visits are an integral and highly valued part of a broad and balanced curriculum, offering unique opportunities for pupils to learn outside the classroom, develop life skills, foster social responsibility, and gain new experiences.

This policy outlines the procedures and responsibilities for all educational visits, ensuring the safety and well-being of pupils and staff, whilst complying with statutory requirements and best practice. The Trust is committed to ensuring that all visits are meticulously planned, effectively managed, and regularly reviewed to provide enriching and safe experiences.

The Trust is committed to:

- a. Providing a framework that ensures the highest standards of health, safety, and welfare for all participants (pupils, staff, and volunteers) on educational visits.
- b. Comply with the Health and Safety at Work etc. Act 1974 (HSWA) and associated regulations.
- c. Promoting a sensible and proportionate approach to risk management, avoiding unnecessary bureaucracy while ensuring real risks are effectively controlled.
- d. Ensuring that all educational visits have clear, justifiable educational objectives that enhance the curriculum and support pupils' development.
- e. Making visits inclusive and accessible to all pupils, irrespective of their special educational needs, medical conditions, disabilities, or protected characteristics.
- f. Fostering a culture of continuous learning and improvement from experience.
- g. For our Church Schools, delivering experiences that enhance the living out of that school's Christian vision
- h. Adherence to Department for Education (DfE) guidance, particularly "Health and Safety: advice for schools" (2014, and any subsequent updates), and "Charging for School Activities" (2018).

3. Scope

3.1. Ebor Academy Trust Board and CEO

The Trust Board has overall strategic responsibility for health and safety across all its schools. The CEO/Accounting Officer is ultimately accountable for the effective implementation of this policy. Their responsibilities include:

- 3.4.1** Overall responsibility for ensuring compliance with health and safety legislation across the Trust, and appointing a Trust-level Health and Safety Lead.
- 3.4.2** Ensuring adequate resources (finance, time, equipment, and competent personnel) are available for effective management of educational visits.

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- 3.4.3 Reviewing the Trust's health and safety policy and performance annually.
- 3.4.4 Approving overseas and higher-risk adventurous residential visits as per Trust procedures.
- 3.4.5 Approving the policy and ensuring its dissemination to all schools.
- 3.4.6 Monitoring compliance with the policy.

3.2. Headteachers

- 3.2.1. Accountable for the effective implementation of this policy within their school.
- 3.2.2. Ensuring that all staff involved in educational visits are aware of and adhere to this policy.
- 3.2.3. Appointing a competent Educational Visits Coordinator (EVC) for their school.
- 3.2.4. Authorising routine day visits and approving visit leaders.
- 3.2.5. Ensuring sufficient budgetary resources are available for safe and healthy visit provision.
- 3.2.6. Ensuring appropriate safeguarding procedures are in place for all visits.

3.3. Educational Visits Co-ordinator (EVC)

- 3.3.1. The school's central point of contact for educational visits.
- 3.3.2. Must complete EVC training and revalidation as required (typically every 3 years).
- 3.3.3. Advising and supporting visit leaders in the planning, assessment, and management of visits.
- 3.3.4. Ensuring that all necessary planning documentation, including trip specific Ebor risk assessments, is completed and approved via the Trust's designated system (e.g., EVOLVE if adopted). Any deviation from the itinerary or planned activities must be considered by the Visit Leader and a dynamic risk assessment made prior to the amended activity taking place.
- 3.3.5. Providing initial approval for visits within their delegated authority from the Headteacher.
- 3.3.6. Liaising with external providers to ensure their suitability and adherence to safety standards.
- 3.3.7. Monitoring and reviewing the effectiveness of educational visits and reporting any significant incidents to the Headteacher and Trust.
- 3.3.8. Ensuring all staff involved in visits have appropriate training.

3.4. Visit Leader

- 3.4.1. The designated member of staff responsible for the planning, organisation, completion of Evolve and safe conduct of a specific educational visit.

- 3.4.2. Must be assessed as competent by the Headteacher and EVC for the level of activity being undertaken, considering their experience, training, and qualifications.
- 3.4.3. Conducts a thorough risk assessment for each visit prior to the trip, identifying hazards and implementing control measures.
- 3.4.4. Ensures all accompanying staff and volunteers are fully briefed on the visit's itinerary, roles, responsibilities, and emergency procedures.
- 3.4.5. Has prior knowledge of the pupils attending, including any special educational needs, medical needs, or disabilities.
- 3.4.6. Carries relevant documentation, including pupil details, emergency contacts, medical information, and a copy of the risk assessment.
- 3.4.7. Maintains appropriate supervision ratios throughout the visit.
- 3.4.8. Ensures all participants (pupils, staff, and volunteers) understand expected behaviour and safety rules.
- 3.4.9. Responsible for responding to incidents and emergencies during the visit.
- 3.4.10. Ensure they are always in a position to be able to act 'in loco parentis' during residential visits and be free from any impairment

3.5. Accompanying staff and volunteers

- 3.5.1. Must take reasonable care for their own health and safety and that of others.
- 3.5.2. Adhere to the instructions of the Visit Leader and this policy.
- 3.5.3. Be fully briefed on their roles, responsibilities, and emergency procedures.
- 3.5.4. Report any concerns or potential hazards to the Visit Leader immediately.
- 3.5.5. Volunteers will be vetted and checked in accordance with the Trust's Safeguarding Policy and will be directly supervised by a member of staff. If they are to have regular unsupervised access to children, then an enhanced DBS will be obtained.

3.6. Pupils

- 3.6.1. Expected to follow instructions from staff and behave responsibly, considering their own safety and the safety of others.
- 3.6.2. Understand and adhere to the rules and boundaries set for the visit.

4. Planning and approval process

4.1. Educational justification

All visits must have clear educational aims and objectives, directly linked to the curriculum and beneficial to pupils' learning and development.

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4.2. Notice periods

- 4.2.1. Adequate notice must be given for planning and approval, allowing sufficient time for risk assessment, parental consent, and logistical arrangements.
- 4.2.2. Routine local day visits: A minimum of 1 week (or as per school's specific protocol for frequently occurring local visits).
 - a. Non-routine day visits: A minimum of 2 weeks.
 - b. Residential or overseas visits: A minimum of 6 weeks.
 - c. Adventurous activities: A minimum of 6 weeks.
- 4.2.3. Exceptions may be made in exceptional circumstances, with explicit Headteacher and EVC approval.

4.3. Risk assessment (HSEx & DfE Expectations)

- 4.3.1. A comprehensive written risk assessment must be completed for every educational visit by the Visit Leader, approved by the EVC, and, where appropriate, the Headteacher and Trust CEO.
- 4.3.2. The risk assessment should be proportionate to the risks involved and focus on real risks, not remote possibilities.
- 4.3.3. Key considerations for the risk assessment include:
 - a. **Identify hazards:** what could cause harm (e.g., traffic, unfamiliar environments, specific activities, weather conditions, external factors).
 - b. **Who might be harmed and how:** consider pupils' age, abilities, special educational needs, medical conditions, and group dynamics.
 - c. **Evaluate risks and decide on precautions:** what control measures are needed to reduce risks to an acceptable level (e.g., supervision ratios, first aid provision, equipment, transport, venue suitability).
 - d. **Record findings:** document the assessment clearly.
 - e. **Implement and review:** ensure control measures are in place and review the assessment if circumstances change or incidents occur.
- 4.3.4. **Common/significant risks to be addressed:**
 - a. **Safeguarding:** protection from harm, abuse, or exploitation.
 - b. **Medical:** management of existing medical conditions, administration of medication, emergency medical procedures.
 - c. **Supervision:** appropriate adult-to-pupil ratios, direct/indirect/remote supervision considerations, specific needs of the group.

- d. **Transport:** choice of transport, driver competence, seatbelts, emergency procedures during transit.
- e. **Environment specific:** weather, terrain, water bodies, specific venue hazards.

4.3.5. Pre-visit checks

Where appropriate (especially for higher-risk or unfamiliar venues), pre-visits should be conducted by the Visit Leader to assess suitability, facilities, and confirm safety standards.

4.3.6. External Providers

When using external providers, the Visit Leader must ensure they have appropriate safety standards, accreditation (e.g., LOtC Quality Badge), and adequate public liability insurance (£5M minimum, higher for some activities). Responsibilities between the school and provider must be clearly defined.

4.4. Approval levels

4.4.1. Headteacher Approval: Required for all day visits, following EVC review.

4.4.2. LGB/LGB Chair Approval: Required for all residential visits, overseas visits, and adventurous activities (regardless of duration), following EVC and Headteacher approval.

4.4.3. The Trust will likely utilise a centralised system (e.g., EVOLVE) for robust planning, management, and approval of all educational visits.

5. Supervision and ratios

5.1. There are no statutory fixed adult-to-pupil ratios. Ratios will be determined by a thorough risk assessment, considering:

- a. Age and maturity of pupils.
- b. Nature and duration of the activity.
- c. Aptitudes, abilities, and experience of the group.
- d. Special educational needs, medical needs, or behavioural considerations.
- e. The specific environment and potential hazards.
- f. Availability of external support (e.g., lifeguards, instructors).

5.2. General Guidance (minimums, subject to risk assessment):

- a. **EYFS (ages 3-5):** 1 adult for every 4 pupils.

NB: There is no statutory legal ration for Reception/Nursery aged children, however the 1:4 ratio for Reception is a strong guideline. If the

visit specific risk assessment deems it necessary, you must use a **higher ratio** to maintain safety.

- b. **Years 1-3 (ages 5-8):** 1 adult for every 6 pupils
- c. **Years 4-6 (ages 8-11):** 1 adult for every 10-15 pupils.
- d. **Residential, overseas, or higher-risk adventurous activities:** Often a higher ratio, typically 1 adult for every 10 pupils, and may require an adult of each gender for mixed groups.

- 5.3. It is generally good practice to have at least two adults accompanying any off-site experience to provide flexibility and cover in emergencies.
- 5.4. Staff must maintain appropriate supervision throughout the visit, including during travel, activities, and "down time" (e.g., meal breaks, evenings on residential visits).
- 5.5. Clear procedures for headcounts will be established and conducted regularly, especially before leaving any venue
- 5.6. The use of "buddy systems" (e.g., pairing pupils) can enhance supervision and pupil safety.
- 5.7. Pupils should have ready access to a competent adult.
- 5.8. Staff have a continuous "in loco parentis" (in the place of a parent) duty of care to the pupils, which applies 24 hours a day on a residential trip. Staff must be in a fit state to respond effectively to any emergency at any time, including a medical incident, fire alarm, or a child becoming unwell.

6. Health and welfare

6.1. Medical Information

Visit Leaders must have access to relevant medical information for all pupils and staff, including allergies and ongoing medical conditions. Additional information may be requested for residential or adventurous visits.

6.2. First Aid

At least one adult with a current and appropriate first aid qualification must accompany every educational visit. The level of first aid training should be determined by the visit's nature, potential risks, and the medical needs of the group. This should ideally not be the Visit Leader. Trips involving early years children will require at least one paediatric first aider, however good practice and risk assessment is likely to require more.

6.3. Medication

Clear procedures for the storage, administration, and recording of medication will be followed in line with the Trust's "Supporting Pupils with Medical Conditions and Allergies" policy.

6.4. Emergency procedures

Robust emergency procedures will be established for each visit, including:

- a. Clear lines of communication (e.g., mobile phone numbers for all staff, emergency contact numbers for parents/carers and the school).
- b. Rendezvous points.
- c. Procedures for lost pupils (e.g., "stay put" for the group, designated search areas).
- d. Procedures for accidents, illness, or other unforeseen events.
- e. Contingency plans for changes in weather, transport issues, or venue closures.
- f. All staff will be fully briefed on these procedures.

7. Parental consent and communication

7.1. Parents/carers will be fully informed about proposed educational visits, including:

- a. Educational objectives and itinerary.
- b. Dates, times, and duration.
- c. Cost (if applicable) and payment arrangements.
- d. Transport arrangements.
- e. Staffing and supervision ratios.
- f. Clothing and equipment requirements.
- g. Emergency contact details for the visit.
- h. Any significant risks identified in the risk assessment.

7.2. Written consent (which may be electronic) must be obtained for all non-routine visits, residential visits, overseas visits, and adventurous activities. A child will not attend without this.

7.3. For routine local visits (e.g., walks to the park, local library), general consent may be obtained upon school enrolment, but parents/carers will still be informed of such visits.

7.4. Parents/carers are requested to provide up-to-date medical information and emergency contact details for their child via the Trust MIS system (Arbor).

8. Transport

8.1. Coaches/minibuses

- 8.1.1.** Only reputable transport providers with appropriate licences and insurance will be used.
- 8.1.2.** All vehicles must be fitted with seatbelts, and it is mandatory for all occupants to wear them.
- 8.1.3.** Supervising adults will be strategically seated throughout the vehicle.
- 8.1.4.** A first aid kit should be readily available on the transport.
- 8.1.5.** Procedures for breakdown or delays will be established.

8.2. Private cars

The use of private cars, arranged by the school, for transporting pupils is not allowed. However, there may be occasions where parents arrange this amongst themselves at their own risk. In such circumstances, parents should be advised over checking driver's licence, insurance, vehicle roadworthiness, and appropriate seating/restraints.

8.3. Public transport

Risk assessment will consider the specific risks associated with public transport, including supervision in crowded environments and procedures for lost pupils.

8.4. Walking

Risk assessment will consider pedestrian routes, road crossings, and supervision strategies.

9. Charging and remissions

- 9.1.** Schools cannot enforce charges for any educational visits or activities that are part of the National Curriculum that take place during school hours.
- 9.2.** When organising educational visits or activities, which enrich the curriculum and the experience of pupils, the school may invite the parent/carer to make a voluntary contribution towards the cost of the visit or activity. If the school does not receive sufficient voluntary contributions, we may need to cancel the visit or activity. When a visit or activity does go ahead it may include pupils whose parents/carers have not paid any contribution. We may not, by law, exclude these pupils and indeed would not wish to treat them differently from others.

- 9.3. Reference should be made to the latest revision of Trust policy 14a “**Charges, Remissions & Debt Management Policy**” which also specifically sets out the trust policy of remissions.

10. Inclusion and equality

- 10.1. Ebor Academy Trust is actively committed to support all pupils to access school trips, visits and sporting activities, playing a full and active role in school life. All educational visits will be planned to be as inclusive as possible, making reasonable adjustments to ensure that pupils with special educational needs, medical conditions, or disabilities can participate fully. The Trust will have due regard for equality considerations, ensuring no discrimination based on protected characteristics (as defined by the Equality Act 2010).
- 10.2. Parents/carers of pupils with specific needs will be consulted early in the planning process to determine appropriate support.

11. Incident management and review

- 11.1. Any incidents, accidents, near misses, or significant concerns during an educational visit must be reported immediately to the Visit Leader, EVC, and Headteacher, and follow the Trust's incident reporting procedures.
- 11.2. All significant incidents will be investigated to identify root causes and implement corrective actions.
- 11.3. After each visit, a brief evaluation will be conducted by the Visit Leader and EVC to review its success, identify any lessons learned, and inform future planning. This should include:
- a. Any significant pastoral/safeguarding issues.
 - b. Any near-misses or accidents.
 - c. Any medical issues/illness.
 - d. Any behavioural issues.
 - e. Any significant issues with the itinerary or venue.
 - f. Would the trip be run again in its present form?

11.4. Lessons learned

Lessons learned will be shared across the Trust to promote best practice.

12. Insurance

Ebor Academy Trust will ensure appropriate insurance cover is in place for all educational visits, including public liability and personal accident insurance for pupils and staff. Specific insurance requirements for overseas visits will be thoroughly checked and arranged.

13. Monitoring and review of policy

This policy will be reviewed every three years by the Ebor Academy Trust Board (or delegated committee) to ensure its continued effectiveness, compliance with current legislation and guidance from the HSE and DfE, and alignment with the Trust's strategic objectives. Any changes to legislation or best practice will be incorporated promptly.

14. Relevant legislation and guidance

- a. The Health and Safety at Work etc. Act 1974
- b. Department for Education: 'Health and Safety on Educational Visits' (latest version)
- c. Health and Safety Executive: 'School trips and outdoor learning activities' (latest version)
- d. The Equality Act 2010
- e. Keeping Children Safe in Education (latest version)
- f. OEAP National Guidance for Managing Educational Visits
- g. afPE Safe Practice in Physical Education, School Sport and Physical Activity

This policy document serves as the overarching framework. Each individual primary school within Ebor Academy Trust will develop and maintain specific operational procedures and documentation for their educational visits, in line with this Trust-wide policy. All schools will utilise the Trust's designated online system for managing educational visits (e.g., EVOLVE) to ensure consistency and robust oversight.

Appendix - Volunteer & Support Staff Educational Visits Safety Checklist

Educational Visit/Trip:

As a helper on this school visit, your primary role is to assist the Trip Leader and ensure the safety and well-being of all pupils. Please review the following before we depart:

1. UNDERSTAND YOUR ROLE

- You are under the supervision of the Trip Leader at all times.
- If you are unsure of an instruction, ask the Trip Leader immediately.
- Never take a pupil away from the group on your own.

2. SAFEGUARDING

- Maintain professional boundaries at all times.
- Report any concerns about a pupil's behaviour, wellbeing, or a potential risk directly and privately to the Trip Leader.
- If you notice a child is missing, alert the Trip Leader and the nearest staff member instantly.

3. COMMUNICATION

- Know who your designated Trip Leader is.
- Ensure you have the emergency contact number (saved on your phone or on your lanyard).
- Confirm you know the designated 'meeting point' in case of emergency.

4. HEALTH & SAFETY

- Familiarise yourself with the specific hazards of the venue (e.g., water, busy roads) and the visit risk assessment.
- Do not administer any medication unless explicitly authorised and briefed by the Trip Leader.
- Keep your phone usage to an absolute minimum and only for trip-related communication.

5. EMERGENCY ACTIONS

- In a medical emergency: Contact Trip Leader immediately.
- In a fire/evacuation: Follow the Trip Leader's instructions to the assembly point.
- If separated from the group: Stay where you are and call the emergency contact number.

CONFIRMATION

I have read and understood these safety guidelines.

Name: _____

Signed: _____

Date: _____

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