



Educational Visits Policy 2026

Policy Originator: Headteacher

Status: Statutory

Review Period: 3 years

Date: January 2026

Next review date: January 2029

Philosophy

At Shalford Infant & Nursery School we believe that educational visits form a valuable and important part of our curriculum. They are an essential resource which can support, enrich and extend the curriculum for all of our pupils. We believe they provide an excellent opportunity to bring the curriculum alive and broaden the children's experiences. As a school, we mirror the requirements of Surrey County Council with OEAP National Guidance via the EVOLVE online approvals system.

Aims

We aim to:

- provide a wider range of experiences for our pupils than we could provide at school alone
- reinforce and enhance curricular opportunities for all of our pupils
- provide opportunities that are safe, well-managed and educationally beneficial
- promote the independence of our pupils as learners and responsible individuals and enable them to grow and develop in a range of learning environments
- extend the curriculum taught at Shalford
- promote safe practice
- ensure all extra-curricular experiences are fully risk assessed and follow school procedure
- use the OEAP & EVOLVE systems to guide our decision making in and out of school.

Roles and Responsibilities

Under the Health and Safety at Work Act (1974), health and safety responsibilities lie with the employer. At Shalford Infant & Nursery School the employer is Learning Partners Academy Trust. An employer has the legal responsibility to carry out the duties imposed by the Act. However, employers can delegate the tasks necessary to discharge these duties, even though the overall responsibility for health and safety rests with the employer.

At Shalford Infant & Nursery School, the tasks of scrutinising and approving arrangements for Offsite Visits and LOtC activities are delegated to the Headteacher of the school.

Headteacher (see NG docs [3.4g](#), [3.3b](#))

The Headteacher will ensure that: -

- All off-site visits and LOtC activities comply with employer guidance and are notified or submitted for formal approval as required;

- All staff involved are competent to carry out such responsibilities as they may be allocated;
- There is a clearly defined EVC and that person meets employer requirements, including undertaking EVC Training, as required by their employer's policy;
- If taking part in the visit or activity as either an Assistant Leader or as a group member, s/he is clear about his/her role and that s/he should follow the instructions of the designated Visit Leader (who will have sole charge of the visit);
- Suitable child protection procedures are in place, including vetting at an appropriate level of all voluntary helpers. Where access to the young people is regular or significant, DBS checks must be in place as required;
- S/he is assured that the EVC, Visit Leaders, assisting staff and voluntary helpers are appropriately trained and competent to carry out such tasks as they are allocated;
- Sufficient time is assigned for staff to organise visits properly;
- A culture of apprenticeship / succession planning, to ensure sustainable visits and the development of competent visit leaders and EVCs, is supported within the school;
- The EVC is supported in ensuring that visits are effectively supervised with an appropriate level of staffing;
- The EVC is supported in ensuring that visit information has been shared with parents in a timely manner and that consent has been sought where necessary;
- Arrangements are made for the medical needs and special educational needs of all the young people and staff;
- Inclusion issues are addressed;
- Suitable transport arrangements are in place and meet any regulatory requirements;
- Insurance arrangements are appropriate;
- Details related to the visit (including person details of both participants staff) are accessible at all times to a designated 24/7 emergency contact(s) in case of a serious incident (*this can be achieved via the "Other Users allowed to view visit" function when identifying Staffing on EVOLVE*);
- That there are contingency plans in place should the visit plan be significantly changed or cancelled (Plan B);
- Arrangements are in place for the governing body to be informed of such visits as are required by the establishment visit policy.
- Staff are aware of the need to obtain best value. Appropriate consideration must be given to financial management, choice of contractors, and contractual relationships;
- Establishment visit policy should identify the types of visit that require a preliminary visit (see **Approval of Visits**);
- All visits will be recorded on EVOLVE using the standard Visit Form;
- Where the activities or visit involves a third party provider, appropriate assurances have been sought; national schemes e.g. LOTC Quality Badge, AALA licence, Adventuremark, or a clear [Provider Statement](#), are recognised in keeping with HCC's recommendations and make further seeking of provider assurances unnecessary;
- All visits are evaluated on EVOLVE with regard to how closely they met intended outcomes, teaching and learning, quality of experience(s) and best value, together with addressing issues raised by any serious incident and to inform the operation of future visits;
- The establishment visit policy includes appropriate emergency procedures in case of a major incident (see **Emergency Procedures**);
- The establishment visit policy includes a procedure to ensure that parents are appropriately informed in the event of a serious incident (see **Emergency Procedures**);
- Serious incidents are reported to the employer as required by employer guidance, meeting the requirements of RIDDOR.

Educational Visits Coordinator (EVC) – see NG docs [3.4j](#), [3.3a](#)

To help fulfil its health and safety obligations for visits, Shalford Infant & Nursery School, has a specifically designated EVC.

The EVC will: -

- Be specifically competent, ideally with practical experience in leading and managing a range of visits like those typically run by the establishment. Commonly, but not exclusively, such competence will be identified in a person on the senior management of the establishment. Where the EVC role is attached to an administrative post, or where a post holder is not an experienced visit leader, s/he will receive structured support in the form of regular supervision meetings from a designated establishment colleague who has that practical experience.
- Attend training, and update training, as required by their employer.
- Support the Headteacher in ensuring that competent staff are assigned to lead and accompany visits and with approval and other decisions.
- Ensure that a policy is in place for offsite visits and LOtC activities, that it is updated as necessary, and is readily available to staff, (e.g. via EVOLVE) and that procedures should aim to minimise bureaucracy, taking full advantage of any national schemes that provide assurances regarding safety and quality of provision.(e.g. there should be no need to seek assurances from adventure activity providers who hold the LOtC Quality Badge, or a current AALA Licence, or Adventuremark)
- Have an appreciation of the value of LOtC and educational visits
- Ensure offsite and LOtC activities meet employer guidance requirements
- Ensure the Headteacher, Visit Leaders, assisting staff and voluntary helpers understand that all staff involved in visits require access to training at an appropriate level to ensure that employers' guidance and the school's procedures are properly understood.
- Ensure offsite activities must be led by competent leaders and that assistant supervisors are competent to carry out the tasks to which they are assigned.
- Organise the training of leaders and assistant leaders, including voluntary helpers.
- Support the Headteacher with approval and other decisions.
- Monitor visit planning and arrange for sample monitoring in the field as appropriate.
- Ensure DBS checks are in place where required.
- Provide sufficient guidance to visit and activity leaders regarding information for parents and parental consent.
- Ensure there is a 24/7 emergency contact(s) for each and every visit and that emergency arrangements are in place.
- Ensure that medical and first aid issues are addressed.
- Ensure that emergency arrangements include emergency contact access to all relevant visit records, including medical and next of kin information for all members of the party and including staff.
- Ensure that visits and LOtC activities are reviewed and evaluated (this process may require the reporting of accidents and incidents) and that any "lessons learned" are recorded for future reference.
- Ensure that visit policies and procedures are reviewed on a regular basis and immediately following any serious incident or systems failure.
- Keep up to date via EVC training events and employer information updates

Visit Leaders (see NG docs [3.4k](#), [3.3e](#))

The Visit/Activity Leader will: -

- Have the overall responsibility for supervision and conduct of the visit. S/he must be an employee and not a volunteer.
- Be competent to take on such responsibilities and tasks as may be allocated or required for the duration of the visit/activity and be formally approved to do so.
- Plan and prepare for the visit, taking a lead on risk management. This establishment sees it as good practice to involve all participating staff in the planning and risk management process for any given

offsite visit or LOtC activity to ensure wider understanding. It is also seen as good practice to involve young people in these processes wherever appropriate;

- Define the roles and responsibilities of other staff (and young people) to ensure effective supervision, and appoint a deputy wherever possible;
- Ensure that where any accompanying staff includes someone with a close relationship to a member of the group, there are adequate safeguards to ensure that this will not compromise group management;
- Ensure that child protection issues are addressed. e.g. DBS checks;
- Collate, make available and disseminate relevant information to supporting staff, parents, and young people as appropriate
- Make sure there is access to first aid at an appropriate level;
- Arrange pre-visit information meetings where appropriate;
- Evaluate all aspects of the visit, both during and after the event;
- Ensure that staff and other supervisors have been appropriately briefed on:
 1. the young people making up the group, including age, health characteristics, capabilities, special educational needs, behaviour, and any other information that seems relevant in the context of the planned activities.
 2. the nature, location, and duration of the activity.
- Ensure the visit is effectively supervised; the overarching duty of care remains with the accompanying establishment staff, even when partial responsibility is shared with a provider. Should the provider run an activity in a way that causes concern, the accompanying staff should consider stopping the activity at the first appropriate moment. Such an intervention will need to be used with great sensitivity and discretion to ensure that it does not result in young people being put at greater risk;
- Ensure that all staff and any third party providers have access to emergency contact and emergency procedure details.
- Have attended either {*employer's Visit Leader training e.g. 'Visit Leader Awareness'*} or the OEAP's 'Visit Leader' training.

See also NG docs [3.4l](#), [3.4m](#), [3.4o](#)

Member of Governing Body (see NG docs [3.4f](#), [3.3c](#))

There will be a member of the School's Governing Body who is designated as specifically responsible for Offsite Visits and LOtC activities. This is usually, but not exclusively, the Chair.

This person's role is to "enable and ensure" by acting as a "critical friend".

S/he will ensure that: -

- S/he has an understanding of how outdoor learning supports a wide range of learning outcomes;
- S/he has access to employer guidance as well as establishment policy, and a training package to support it;
- This policy clarifies his/her involvement in the visit approval process (see **Approval of Visits**);
- There is an EVC in place as defined in this policy document
- There are formal notification and approval procedures in place that meet with employer recommendations and requirements;
- Shalford Infant & Nursery School's visit policy supports the principles of inclusion;
- There are monitoring procedures in place.

Competence (see NG docs [3.2d](#) and [6h](#))

Competence is a combination of skills, knowledge, awareness, judgement, training, and experience.

The competence of the visit leader is the single most important contributory factor in the safety of participants.

Consideration will be given to the following when assessing the competence of a member of staff to lead a visit:

- a) What experience has the leader in leading or accompanying similar or other visits? (check Visit History / Awards & Training on 'EVOLVE').
- b) Is the leader competent in planning and managing visits?
- c) What are the leader's reasons for undertaking the visit?
- d) Is the leader an employee at the establishment (*see above*)?
- e) Does the leader can manage the pastoral welfare of participants?
- f) Does the leader exhibit sound decision-making abilities?
- g) What experience has the leader of the participants he/she intends to supervise?
- h) What experience has the leader of the environment and geographical area chosen?
- i) If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- j) Does the leader possess appropriate qualifications, especially if leading adventurous activities?
- k) Is the leader aware of all relevant guidelines and able to act on these?

The school undertakes to ensure that all teaching staff, will undergo an induction process that typically entails some form of visit leader awareness training, either in-house or from the LA's or employer's educational visits adviser, access to (and training where required) the establishment's 'EVOLVE' site and practical experience of accompanying visits and LOTC activities *before* being tasked with leading a visit for themselves.

Planning (see NG docs [1b](#), [3.3e](#), [4.1b](#), [4.2a](#), [4.3a](#), [4.4h](#), [4.5a](#))

The extent of planning required is related to the complexity of the visit, based on STAGED: - Staffing, Timings, Activity, Group, Environment, Distance.

Risk Assessment (see NG docs [4.3c](#), [4.3f](#), [4.3g](#) and [6a](#))

Risks are expected to be reduced to an *acceptable* or *tolerable* level, and not necessarily eliminated. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity.

Due to the complex nature of off-site visits, conventional 'risk assessment' as a stand-alone tool is not particularly useful and can on occasion be misleading. It is of greater benefit to consider the overall 'risk management' of visits by taking all aspects of visit planning and management into account. This can be achieved effectively through a combination of the 'EVOLVE' visit form itself, and where appropriate, any event specific notes or attachments.

Visit planning includes consideration of the question: '*What are the really important things that we need to do to keep us safe?*' It should focus on those issues that are specific to the individual event, taking into account the needs of the group (including special and medical needs), the experience and competency of the staff team, and the leader in the context of the event. Significant issues must be recorded on 'EVOLVE', either notes or as an attachment, and shared with all parties.

This planning process by the leader may be compared to the expectation of a teacher to plan a lesson/session which is relevant to the needs of the group.

Planning that includes adventurous activity commonly involves delivery by an external provider and the provider will have responsibility for risk assessing and managing the activity. As such, the provider's risk assessment is not the concern of the establishment leader, does not need to be requested from the provider, and does not need to be attached to 'EVOLVE'.

Use of generic risk assessments

A selection of generic risk assessments is available in Word format from the Guidance Policies and Documents pages in the Resources section of 'EVOLVE'.

Whilst not exhaustive, the control measures contained within this selection are probably sufficient to cover most eventualities likely to be encountered in the course of most offsite visits and LOfC activities.

Staff are encouraged to compile their own “event-specific” risk assessments which can then be reviewed and re-used as required.

Plan B

Alternative arrangements should be included within the planning process where appropriate, for example, where weather conditions or water levels might be critical, or where an overcrowded venue might necessitate an alternative option.

Where appropriate, all alternative activities should be fully considered and risk assessed beforehand.

Seeking Assurances from Provider (see NG [4.4g](#))

National Guidance provides the [Provider Statement](#) form to help provide an audit trail for arrangements and checks if required.

Many providers have websites and offer information packs which contain the sorts of information asked for on this form, including a Safety Management statement, so it may not be necessary to use one.

The Provider Statement is a generic form, for use for all kinds of provider, so if one is sent to a provider, it should be specified that they only need to complete the parts applicable to them/their services.

Once a Provider Statement form has been received, signed, and dated by a manager or person in authority, it is not always necessary to send a new one to the same provider each time you use them. It is sufficient to annotate the existing form already held by the establishment to show the school has checked back with the provider and that there have been no major or significant changes since the form was originally signed; this will not apply if the time interval is not more than 12 months or so.

To reduce bureaucracy for both Visit Leaders and Providers, leaders should take advantage of national schemes that have been established to eliminate the need for questionnaires and forms as advised in LA guidance e.g. **LOfC Quality Badge, AALA Licence and ‘Adventuremark’**.

Holding one of the above is a credible assurance of Health and Safety, and Visit Leaders should seek no further verification. The [LOfC Quality Badge](#) also covers learning quality.

Visit Leaders should **not** ask for copies of risk assessment documentation (NG [6a](#)) but may seek assurance of a provider’s competence to deliver their activities safely by means of a Safety Management statement if this is not already provided.

National Institutions and Public Buildings: - by their very nature these venues and providers are extremely unlikely not to conform to current Health & Safety legislation so it should not be necessary to require them to complete an OV6 or send out copies of their risk assessment documents.

Preliminary Visits

Wherever reasonably possible, it is good practice for the Visit Leader to make a preliminary visit to a venue or provider beforehand in order for them to familiarise themselves with the layout and surroundings, and any site-specific procedures or issues which may have an impact on the visit or members of the group.

Within the UK, highest priority for preliminary visits will be where no serving member of staff from the establishment has visited before, then when the Visit Leader has no experience of the venue/activity.

For overseas visits, advantage should be taken of any offers by tour operators for “leaders’ orientation”-type visits.

Participants (see NG [3.3f](#))

It is good practice to involve participants in the planning and organisation of visits, as in doing so they will make more informed decisions, and will become more ‘risk aware’ and hence at less risk. They will also have greater ownership of the event.

Outcomes (see NG doc [5.1d](#))

Clarity regarding the intended outcomes of the visit will help to ensure that the potential benefits can be achieved. Up to four 'intended' outcomes may be recorded on 'EVOLVE' during the planning process, for subsequent evaluation.

Work that takes place outside the classroom can provide a very powerful means of developing learning in all curriculum areas, and raise attainment. Experiential learning can also provide opportunities for development in other areas, including:

- Relationships
- Emotional & spiritual
- Cross curricular
- Individual
- Teamwork
- Environmental

Preparatory work should take place in advance of the visit where appropriate. This, in conjunction with activity that will take place during the visit, should feed into any follow-up work.

'[High Quality Outdoor Learning](#)' can be used as a tool by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place.

Staffing and Supervision (see NG docs [4.2a](#), [4.2b](#), [4.3b](#), [3.2g](#))

Learning Partners Academy Trust requires Shalford Infant & Nursery School to ensure there is an **appropriate level of supervision at all times** for all visits and that such supervision is 'effective'. This must have been approved by the EVC and Head of Establishment and, where applicable, in accordance with Governing Body policy.

Ratios for Early Years are specified and must be adhered to for indoor settings (see [Early years foundation stage \(EYFS\) statutory framework](#)); however there are no specified ratios for EYFS and offsite visits. A useful "rule of thumb" as a starting point is for the average age of the children in years to determine the maximum number of children per supervising adult) e.g. 3 years = 3 children per adult)

For all *other* visits the visit leader, EVC and Head of establishment will make a professional judgement regarding the number and suitability of staffing on an individual visit basis after consideration of the following factors:

- the type, level, and duration of activity;
- the nature and requirements of individuals within the group, including those with additional needs;
- the experience and competence of staff and other adults;
- the venue, time of year and prevailing/predicted conditions;
- the contingency or 'Plan B' options.

A visit must not go ahead where either the Visit Leader, EVC, or Headteacher is not satisfied that an appropriate level of supervision exists.

A useful 'starting point for consideration' is 1 adult :6 children. Where departure from this starting point results in fewer staff, the justification should be recorded as a note on 'EVOLVE'.

Staff who are assigned to support the special needs of an individual cannot be included in the overall staffing ratio. Their responsibility should not include the wider group.

Particular consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits.

Staff and volunteers who work *frequently* or *intensively* with, or have regular access to young people or vulnerable adults, must undergo an enhanced DBS check as part of their recruitment process. For the purpose of this policy:

- '[frequently](#)' is defined as 'once a week or more'.
- '[intensively](#)' is defined as 3 times in a 30 day period or overnight (2am - 6am).

Use of Voluntary Helpers (see [3.4m](#), [3.4o](#), [3.2g](#))

The use of parents and other adults with a clear association with the establishment, as helpers or supervisors on offsite visits or LOtC activities, is seen as a valuable means of encouraging or maintaining closer links with the local community and accessing a wider set of skills and experience than may exist amongst the school's staff.

Such volunteers will need to understand and consent to the fact that they will be answerable to the visit/activity leader.

It is a fact that a volunteer will not be accountable through a legalistic audit trail (as would exist were their involvement based on a contractual relationship) and is therefore the case that a volunteer helper cannot be appointed as a Visit Leader.

It is good practice that all adult helpers and volunteers are subject to DBS checking; however this may not be required where there is no possibility for unsupervised direct contact exists.

Clear DBS checks must have been returned before a volunteer adult helper may participate in a residential visit or activity.

Emergency Procedures (see NG [Section 4.1](#))

Staff involved in a visit must be aware of, and adhere to, Shalford Infant & Nursery School's policy on emergency procedures.

The School maintains a number of mobile 'phones specifically for use during offsite visits which should have all relevant contact details pre-programmed into them. It is each Visit Leader's responsibility to ensure these 'phones have:

- the correct details programmed into them beforehand;
- fully-charged batteries (and chargers available if necessary)
- sufficient credit available for the duration of the visit

For all "out of hours" and residential visits there will be a nominated person(s) that can provide 24/7 cover as an Emergency Contact and that the person(s) so nominated will have 24/7 access to all details of the visit. This will include medical and next-of-kin information regarding staff as well as young people.

Consideration will be given to the following:

- Criteria for identifying the nominated Emergency Contact(s)
- Is more than one Emergency Contacts required?
- Procedure for lodging visit plans to enable them to be accessed in the event of an emergency?
- Have procedures been tested?
- Is it possible to demonstrate a proactive response, to any pattern that can be recognised within incidents?

Visit Leaders should also complete and carry an Emergency Contacts sheet (OV9), although use of the EVOLVEgo app on a mobile device may supersede this for many visits

The Visit Leader should have an "Operation Duke" card.

First Aid (see NG doc [4.4b](#))

It is not always necessary that qualified First Aider accompanies an offsite visit or LOtC activity. First aid issues for any LOtC activity should be considered as part of the risk management process and the exact requirements should be determined by ensuring that first aid support is available at an appropriate level.

What is "appropriate" will be determined by:

- The nature of the activity.
- The nature of the group.
- The likely injuries associated with the activity.
- The extent to which the activity will isolate the group from normal ambulance support, or a known point where a qualified first aider will be available.

A very basic level of first aid support must be available at all times. This will require that one or more of the staff leading the activity:

- Know how to access qualified first aid support.
- Have a working knowledge of simple first aid and are competent to use the first aid materials carried with the group.

For EYFS outings, there **must** always be at least one member of staff present who holds a current Paediatric First Aid certificate.

For some activities (most commonly in defined adventure activities) there is a good practice expectation that requires those leading such activities to hold a current first aid “qualification”. To be a “qualification”, the first aid course must include a formalised assessment process; otherwise any certification will have the status of a certificate of attendance. In practical terms, the course will be a minimum of 16 hours.

It is a legal requirement that all minibuses must carry a first aid kit.

Approval of Visits

Approval is delegated to the Headteacher for all visits.

However Surrey County Council’s Policy requires the following types of visit to be notified to the LA/Employer via EVOLVE: -

- Overseas (anywhere that involves crossing a substantial area of open sea, including Northern Ireland, the Isle of Man, the Hebrides and the Channel Islands)
- Those involving one or more adventurous activities to be led by a member of establishment staff.
- *Other visit types e.g. Residential visits and /or adventurous activities led by a provider*

Regardless of whether a visit should be notified to the LA/Employer or not, there should be a clear, unambiguous audit trail for arrangements with clear evidence of approval. Such evidence will usually be recorded on EVOLVE but where this is not the case a signature of endorsement on a lesson plan will suffice.

The process for approval has three main stages:

1. Visit/activity proposed and planned by Visit Leader and accompanying colleagues;
2. Arrangements scrutinised by EVC until satisfied to recommend approval;
3. Arrangements re-scrutinised by Head and, when satisfied, approved.

An offsite visit or LOtC activity should not proceed without clear evidence of approval.

Where a visit also needs to be notified to the *LA/Employer*, this is done automatically by ‘EVOLVE’.

Consent (see NG [4.3d](#))

Section 35 of the Education Act 2004 states: “Where a visit is part of a planned curriculum in normal curriculum time, then parental consent is not necessary although it is recommended good practice to ensure that parents are informed”.

Annual consent is appropriate for regular routine activities that take place during normal school hours.

For all other visits, consent should be obtained on an individual visit basis. Information provided to parents prior to granting consent should include full details of the activities and any other significant information.

Insurance (see NG doc [4.4c](#))

Advice regarding insurance may be sought from the employer’s insurance department or the school’s business manager.

Contact details are given on the ‘Contact’ page and from the ‘Insurance’ section when completing a visit entry on ‘EVOLVE’.

For those establishments who make their own insurance arrangements, personal accident / travel insurance must be taken out for all visits abroad. For all other visits it is the responsibility of the Governing Body (where applicable), Head of Establishment, and Educational Visits Coordinator to determine whether additional insurance should be taken out. The establishment should particularly consider the need for additional insurance for residential activities, or those involving adventurous activities or hazardous environments.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid GHIC or EHIC (Global/ European Health Insurance Card). See [Healthcare for UK nationals visiting the EU - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/organisations/government-of-the-uk/departments/department-of-health-and-social-care/healthcare-for-uk-nationals-visiting-the-eu)

Inclusion (see NG docs [3.2e](#), [4.4i](#), [4.4L](#))

Shalford Infant & Nursery School endorses the following principles:

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

Under the Equality Act 2010, it is unlawful to discriminate against disabled participants because of their disability, without material or substantial justification.

Visit Leaders are required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage.

However, the Disability Discrimination Act does not require responsible bodies to place employees or participants at inappropriate risk if a health and safety issue arises.

It is also the case that the adjustments made to include a disabled young person should not impinge unduly on the planned purpose of the activity.

Expectations of staff must be reasonable, so that what is required of them (to include a given young person) is within their competence and normal work practices.

Codes of Behavioural Conduct

Shalford Infant & Nursery School encourages the use of codes of behavioural conduct as a means of establishing appropriate expectations of young persons' behaviour. Such codes need to be explained to both the young people and those in a position of parental support before the visit, so reducing the opportunity for misunderstanding both expectations and the sanctions that may be invoked where the code is breached.

As part of encouraging social responsibility, young people should be encouraged to sign up to a "behavioural contract" for all residential visits

As part of the request for consent, parents should sign and accept responsibility for removing young people in prescribed circumstances.

Further examples can be found under 'Resources' on 'EVOLVE' (see also NG doc [8.1i](#)).

Weather, Clothing & Survival

Where appropriate, the leader must obtain and act upon recent weather forecasts and local advice.

Participants should be adequately clothed appropriate to:

- The time of year, prevailing weather conditions, altitude and exposure to elements;
- Likely changes in weather;
- The experience and strength of the party;
- The nature of the visit and environment.

When venturing away from immediate help, leaders should consider the need for:

- Comfort, insulation and shelter for a casualty;

- Comfort, insulation and shelter for the whole group;
- Provision of emergency food and drink;
- Torch;
- Possible need of signalling equipment and/or mobile phone (NB. Mobile phones may not work in remote areas);

It is primarily the responsibility of the visit leader, in consultation with other staff where appropriate, to modify or curtail the visit or activity (e.g. Plan B) to suit changed or changing circumstances - for example: over-busy lunch area, rain, rising water levels, etc.

Transport (see NG doc [4.5a](#))

Private Cars (see NG doc [4.5c](#))

Where a private (staff or parent) car is to be used to transport young people then this must be approved by the Headteacher (or their nominated delegate), and Private Car or Volunteer Driver form (see 'Resources' pages on EVOLVE) must be completed and retained by the establishment on an annual basis.

Coaches (see NG docs [4.5e](#), [4.5f](#))

Learning Partners Academy Trust does not 'approve' coach companies. Whilst UK legislation ensures that coach companies are fit for public use, the facilities available on coaches may vary. Liaising with other establishments within the LA that have used a particular company (via a search on 'EVOLVE') will help to determine the level of service that may be provided.

Public Transport

Shalford Infant & Nursery School recognises the social and environmental benefits of travelling by means of public transport and encourages its use wherever feasible

For public transport within the Greater London area contact '[Transport for London](#),

When travelling with a school group on the London Underground, London Overground or the Elizabeth line, Visit Leaders should speak to a member of staff at the gateline before starting their journey.

TfL staff can confirm the planned route and contact the destination, and any interchange stations, to check there are staff available to help as part of their [Turn-up-and-go assistance service](#). This will help ensure the journey goes smoothly and provides the reassurance of having a member of TfL staff available to support the group if required. It is also helpful for TfL station teams to know that a school group is on the way, especially at popular stations/locations e.g. Kew Gardens, South Kensington.

Farm Trips

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions and refer to national guidance on farm visits to ensure a safe experience for all on the trip. Advice should be sought on any current health risks to any members of the visiting party and procedures be noted in the risk assessment to minimise the chance of infections.





Shalford Infant School Risk Assessment & Risk Management Record

Date _____

Yr Grp: _____

Location/Purpose: _____

Group Size: Ratios _____

Group Leader: _____

Other staff members: _____

Step 1 Identifying the hazards – assessing the risks	Step 2 Identify who might be harmed and how		Step 3 Control measures – reducing the risks
List of significant hazards (something with the potential to cause harm)	Who might be harmed?	Type of harm	Consider the suggested measures below, and tick those that you decide are helpful and applicable, and delete or put a cross against those that are not. Add extra measures in each section as needed.

Variation Record any additional assessments and control measures here if this sheet is used as a generic risk assessment.

Shalford Infant & Nursery School School Visit Checklist

Pre-Planning	
Check with Headteacher for visit authorisation and discuss any potential risks/issues	
Begin the trip costing sheet and check transport availability as a priority with office secretary	
Obtain cost for entrance fees and coaches and any other anticipated expenses	
Visit the proposed venue (All staff who have not visited the venue previously should make a visit and group leader should visit venue prior to each group visit)	
Check the venue for facilities e.g. toilets, eating amenities, shops and for fire precautions and security/safety implications	
Check ratio of staff : children needed for the visit	
Ensure points for alighting and entering the coach/minibus are safe	
If coach journey is in excess of ninety minutes, ensure that the suggested toilet stop is safe. If possible, avoid motorway services. Check toilets and possibility of barring members of the public whilst the children will be using the toilets	
Agree the total for children to pay based on transport, admission fees, incurred supply costs, reccy costs, incidentals and confirm with school office to double check figures	
Write a letter to parents, including details of venue, subject, date, times, cost, clothing, food and money to be brought by the children	
Ensure transport/venue is booked	
Identify first aider.	
Ensure support staff swap lunch duty on trip day if relevant	
In the Weeks Before the Visit	
Finish the trip costing sheet with the school office and keep referring to the Visit Checklist	
Request any payment from the school finance manager at least ONE week in advance	
Check all children's medical details e.g. allergies, asthma, travel sickness and add to the risk assessment	
Upload the risk assessment and complete the necessary online information TWO WEEKS before the trip date.	
Check all adults participating are DBS checked or you have permission from the Head teacher to take along helpers if they are not checked.	
Ensure all adults know their duties/roles and have a copy of the risk assessment identifying children with medical concerns	
Ensure a list identifying which children are travelling in which vehicle, if more than one coach/minibus is used, is given to school office	
Leave mobile numbers of all accompanying staff with the school office	
After school the day before/on the morning of the trip	
Confirm route to be taken by all drivers and ensure helpers included in the ratios follow the main coach	
Informally check the coach/driver for any obvious hazards including ensuring all seatbelts are working.	
If relevant, collect medication e.g. epipens, inhalers and copy of parent's permission slip with information regarding dosage and times. Record sheet to indicate when medication was issued should also be taken	
Ensure that parent helpers and staff are sitting in designated seats on coach and that children are not in front seats, seats overlooking stair wells, next to emergency escapes or in the centre of the back seat overlooking the aisle	
Collect sick buckets/bags and paper towels for each coach/mini-bus	
Issue medical bags to all group leaders and collect spare clothing bags from main office if appropriate	
Issue Emergency (Operation Duke) Cards to all teachers	
Take a register and liaise with parents/carers of absent children	
During the trip	
Call the school office and confirm safe arrival when you have reached the venue	
Call the school office on departure and give them an ETA; update as required based on traffic	
Return all medication/emergency cards/first aids kits to the school office and put medication back into class boxes	

**IN CASE OF FATALITY OR EMERGENCY:****FEBRUARY 2026**

- Inform local emergency services
- Inform duty officer: Michelle Dutton 07817 305181 OR School Office – 01483 562143
- If duty officer unavailable, call Learning Partners Academy Trust – **Jack Mayhew 07595024281 / Olivia Wernick 07793196683**

If Learning Partners unavailable contact SCC Duty Emergency Management Duty Officer (tel: **07831 473039**)

- You will be answered by either:
 - The SCC Emergency Management Team Duty Officer - quote **OPERATION DUKE**
 - or - A duty answer phone – quote **OPERATION DUKE**, leave a message and your number.

You will be called within 5 minutes

- **DO NOT SPEAK TO PRESS OR MEDIA**
Refer to SCC Duty Press Officer

Daytime tel: **0208 541 8996/9962**
Out of hours tel: **0208 541 7920**



Try to prevent staff and young people phoning home until contact has been made with your Duty Officer or Emergency Planning Officer

When contacting duty officer or emergency planning officer be prepared to give the following information:

- Quote '**OPERATION DUKE**'
- Your full name
- The telephone number you are calling from
- Name of group involved
- Exact nature of the incident
- Is a fatality involved? Has it been confirmed? By whom?
- Full name(s) and ages of injured person(s)
- Exact nature of injuries
- Whether local police or emergency services have been informed
- Whether any next of kin have been informed, if so, how?
- If contacting Emergency Planning Officer, name and number of unobtainable duty officer

