



WICKENSLEY  
PARTNERSHIP  
TRUST.

# Educational Visits and Learning Outside the Classroom Policy

OWNER: Senior Operations Manager

DATE: September 2023

APPROVED BY: Board of Directors

REVIEW DATE: September 2025

WICKENSLEY

[www.wickensley.org](http://www.wickensley.org)

CEO: Mrs M O



# 1 Introduction

Wickersley Partnership Trust (hereafter known as WPT) is committed to ensuring that students have a wide range of educational visit experiences to enrich their learning.

We believe that educational visits are an integral part of the entitlement of every student to an effective and balanced curriculum. The benefits to students of taking part in visits and learning outside the classroom include, but are not limited to:

- Improvements in their ability to cope with change
- Increased critical curiosity and resilience
- Opportunities for meaning making, creativity, developing learning relationships and practising strategic awareness
- Increased levels of trust and opportunities to examine the concept of trust (us in them, them in us, them in themselves, them in each other)

### 3 Legal Basis

This policy has been written to be compliant with the Department for Education Guidance [Health and Safety on Educational Visits](#).

WPT has adopted the [Outdoor Education Advisers' Panel \(OEAP\) National Guidance](#) as an integral part of the Educational Visits Policy.

### 4 Inclusion

The Equality Act 2010 states that the responsible body of a school must not discriminate, harass or victimise a student to whom one of the protected characteristics applies (disability; gender reassignment; pregnancy and maternity; race; religion or belief; sex and sexual orientation) in the way that it affords (or not) the student access to a benefit, facility or service. WPT accepts and welcomes our duty to make reasonable adjustments for the purpose of inclusion.

WPT will make every effort to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender, religion or any of the other protected characteristics. If a visit needs to cater for children and young people with special needs, every reasonable effort will be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

At primary schools, regarding internal Trust school sports fixtures, events, Trust swimming lessons and Trust hosted activities at Ulley reservoir, due to the regular and routine nature of these activities and age of the students involved, these activities are classed as type 0 educational visits. The aide memoir (Appendix A) for Type 0 educational visits must be followed.

Type 0 educational visits do not need to be recorded on Evolve. However, to support these educational visits, the table in Appendix A sets out the minimum steps needed for safe planning and preparation.

#### Type 1 - EVOLVE Required

Educational visits that need risk assessment and extra planning and are not covered by existing policies and risk assessments. This could include factors such as:

- Locations outside of the school and Trust premises
- Travel that includes non-Trust transport and/or busy roads
- Contact with the general public

At primary schools, regarding school sports fixtures/events which require travel to a non-Trust site or involvement of non-Trust participants, these activities would be classed as Type 1 visits and recorded on EVOLVE. This recognises the younger age and increased dependence of the students involved, as well as the relatively infrequent nature of these activities in primary schools. All 'School Games' activities, involving non-Trust participants or hosted at non-Trust sites require EVOLVE.

#### Type 2 - EVOLVE Required

Type 2 visits involve a level of risk higher than Type 1 visits. This risk is derived from the activities the visit entails or the location of the visit. Type 2 visits include visits abroad and adventurous activities, such as hill walking and visits by water

Type 1 and Type 2 visits each require planning and approval within Evolve. This additional level of oversight, quality assurance and scrutiny is due to the additional risk involved in these types of educational visits.

An important part of planning for any educational visit is to consider what hazards or risks the visit may involve and put in place plans to account for this. EVOLVE is set up to help staff through this process via the provision of templates which detail commonly occurring hazards.

All visit plans should be submitted to the Evolve system 6 weeks prior to the visit. This allows for a safe amount of time for visits to be planned correctly and to go through the authorisation process.

All Type 1 and Type 2 visits would be expected to have, as a minimum, a risk assessment for the visit ('GRA1

the risk assessments must be sufficiently senior to ensure that the actions identified in the risk assessments are completed and adhered to.

Risk assessment templates can be sourced via EVOLVE. These risk assessments are templates, they should be amended to be specific to the visit being assessed and each section of the risk assessment must be completed in full, then the form signed and dated. There are a range of risk assessment templates available, dependant on the activities being undertaken e.g 'Sports Match' or 'Coastal Visits'.

To understand what risks there may be on a visit, it is important that the physical location and layout of a venue is considered. This may require a physical visit to the site as part of the visit planning. Google maps can also be utilised to inform trip planning but the Visit Leader must make sure the information is up to date.

Completed risk assessments must be shared with other adults, including volunteers, who are involved in the educational visit. Those completing risk assessments must ensure that the staff and volunteers whom they share the risk assessments with understand them.

Certain aspects may also need to be shared with the students attending the visits such as emergency procedures, meeting points, safety equipment etc.

For

- Their risk assessments
- Control measures
- Their use of vehicles

For educational visits on Evolve, the EVC is the first line approver for all educational visits. Following first line approval by the EVC the completed Evolve record is submitted to the Headteacher for final approval. At any stage in this process the Evolve record can be returned to the staff member planning to visit for amendment or correction.

For adventurous activities or overseas educational visits, following first line approval by the EVC, the Evolve record is reviewed by the Head teacher for approval. Once approved by the Head the Evolve form will go through to the appointed Outdoor Learning Manager (RMBC/ LCC) for their approval and advice. The role of the Outdoor Learning Manager (RMBC/LCC) is to provide advice only and responsibility remains with the Headteacher.

## 6 Roles and Responsibilities

### Visit Leaders

Visit Leaders are responsible for the planning of their visits, and for entering these on EVOLVE (where required). They should obtain outline permission for a visit from the Headteacher or delegated member of SLT prior to planning and committing to any course of action. Schools with access to EVOLVE+ must use this function. Visit leaders have responsibility for ensuring that their visits will comply with all relevant guidance and requirements. Visit Leaders are responsible for ensuring that



ensure their safety during the visit. All staff are responsible for deleting any draft records of proposed

instructor, and knows the location of the activity

All supervisors on the visit are appropriate people to supervise children and have appropriate clearance

Where use of Evolve is required, this record is comprehensive and accurately completed

Responsible for ensuring that the Visit Leader follows all aspects of visit preparation, including all relevant permission checks, safeguarding and SEND requirements

### The Governing Body

The Governing Body's role is that of a 'critical friend'. Individual Governors may request 'read-only' access to Evolve.

### The Local Authority

The local authority is responsible, via Evolve, for offering specialist advice and guidance on all visits that are either overseas, residential, and/or involve an adventurous activity. Final sign off for these visits will remain with the Headteacher







visit, for further guidance please refer to the School Health and Safety Policy. Once the list of students

For type 2 and type 3 educational visits, there is a template risk assessment for travel ('GRA2 Travel' template) within Evolve.

#### Use of Private Vehicles

At Headteacher's discretion

Driver confirms that business insurance is in place and the vehicle is roadworthy. The Trip Leader must see proof of business insurance

## 17 Training & Staff Development

As part of the services provided to WPT by Rotherham Metropolitan Borough Council, WPT has access



## Appendix A

### Type 0 Planning Aide Memoire

Area of Planning	Considerations
Visit Type	Referencing the policy, ensure that the visit does fit in the category of 'Type 0' visit before proceeding.
Visit Plan	Have a complete plan of the visit, including travel arrangements, an understanding of the venue, activity to be completed and local conditions.

	<p>Ensure that contact with the school is possible at all times via mobile telephone.</p> <p>When travelling to other Trust sites there will already be risk assessments in place for those activities and premises. When using Trust transport, there is an existing risk assessment in place. Although these risk assessments have been carried out by someone else, it's recommended that you familiarise yourself with them.</p> <p>Student information will need to be checked including SEND and safeguarding information (including photo consent), and where applicable individual risk assessments created.</p>
First Aid and Medical Needs	<p>Ensure that there is appropriate first aid cover on the visit and at the venue (if required).</p> <p>Ensure that there is a process in place to check every student's medical needs. Arrangements need to be in place to take copies of Individual Health Care Plans and any medication on visits. Ensure that any medical conditions or medication that requires specific training, e.g. Epipens and epilepsy, are safely planned for.</p> <p>The Trust's Medicines Policy must be followed.</p>
SEND and Safeguarding	<p>Ensure that every student's SEND and safeguarding needs are checked and considered are part of planning for the visit, including photo consent.</p>

## Appendix B

### Flow Diagram of the Evolve Process



## Appendix C

### Provider Statement for Educational Off-Site Visits and Activities

FOR COMPLETION BY PROVIDERS AND TOUR OPERATORS OF EDUCATIONAL VISITS AND ACTIVITIES FOR ESTABLISHMENTS WITH ROTHERHAM MBC SERVICE LEVEL AGREEMENT

This form is designed to help the Visit Leader/establishment confirm that a provider meets required standards

#### PART 1: To be completed by the Visit Leader

Establishment/School	
Email	
Visit Leader	
Visit Leader	
Date(s) of visit	

#### PART 2: To be completed by the Provider

Provider - please give careful consideration to the following statements and respond with YES, NO or N/A, or give the specific information required. If you hold a valid Learning Outside the Classroom (LOtC) Quality Badge, you need complete only Section A and the Confirmation.

#### SECTION A - to be completed by all providers

1.	Learning Outside the Classroom Quality Badge	Yes, No or N/A
1.1	Do you hold a Learning Outside the Classroom Quality Badge?	

2.	Data Protection	
2.1	Do you comply with the General Data Protection Regulations (GDPR)?	
2.2	Will the terms of the contract with the establishment include an outline of how any personal data the establishment shares with you will be shared, used, stored, secured and eventually deleted or returned?	



8. Staffing		
8.1	Are staff who have access to young people checked for relevant criminal history and suitability to work with young people?	
8.2	Are there regular opportunities for liaison between your staff and visiting establishment staff?	

9. Accommodation







SECTION F to be completed by all providers

15. Accreditation	
15.1	Please provide details of any relevant accreditation with reference numbers and expiry dates

## Appendix D

### Template Letter to be used for Educational Visits which Require Consent

Class / Year \_\_\_\_\_ will be going on a visit to \_\_\_\_\_ on \_\_\_\_\_.

The visit leader will be \_\_\_\_\_ and students will be travelling by WPT minibus (or full details of WPT approved coach - ensure this is booked through WPT Transport Team). All relevant Trust risk assessments have been completed. The Educational Visit and Learning Outside the Classroom Policy can be accessed via the school website.

The purpose of this visit is to provide students with the opportunity \_\_\_\_\_. (If there is additional information attached to the letter, state this).

The trip will depart at \_\_\_\_\_ and return at \_\_\_\_\_.

[One of the following two paragraphs should be included, depending on whether this is a trip within school hours]

As the trip is in school time, in case of emergency please contact the school office.

As the trip includes periods of time when the school office is closed, in the case of emergencies during these

[Include a paragraph on if there is going to be any further information provided or QA sessions put on - usually for residential or more complex trips]

[If payment is needed, include the following "Please make your payment via ParentPay and sign and return this slip." ]

I, .....give permission for to attend the educational visit.

If you have any further queries, please contact \_\_\_\_\_ on \_\_\_\_\_ or via email at \_\_\_\_\_.



## Staffing the Visit

Produce a list of proposed staff. Consider needs of the students, complexity of the visit and ratios within the policy.

Decisions on which staff are to attend the visit must include staff experience, teaching commitments, cover and purpose of the visit, e.g. in secondary schools, if the visit is a geography field visit then geography specialists will be required.

Where a trained first aider is required, ensure that the staffing of the visit meets the requirement set out in the policy.

Where the visit includes adventurous activity, ensure that the staffing of the visit meets the requirement set out in the policy.

## Costing

Ensure the full cost of the visit is calculated. It is important to include who will pay for the visit, including if students are being asked to contribute.

Ensure that transport is fully considered. If Trust minibuses are not being used, ensure that external transport is booked via approved providers. Schools can book their own transport after establishing via the Transport Manager ([transport@wickerslept.org](mailto:transport@wickerslept.org)) who the approved external providers are.

If Trust minibuses are being requested, ensure that this is done as far in advance as possible. Establish if Trust drivers are being requested as well or if school staff will be driving.

Ensure that the 1.275% been added on to the visit cost to cover ParentPay fees.

If you are requesting that any portion of the cost is covered by other budgets, ensure that the budget holder is alerted and is able to make a decision.

## Following outline approval of visit by Headteacher

Once outline approval has been given, ensure that any venue, activity or event that requires booking is promptly booked.

Write letter for parental permission / notification (consult policy for what educational visits require parental permission and for template letters). Ensure that whoever is signing the letter checks this prior to it being sent.

Ensure that the letter to parents has a deadline for replies and payment, and includes information on how to make payment (where applicable). It is important to make clear what constitutes a parent successfully reserving a place on the visit, e.g. can they simply request a place, or does payment need to have been received to confirm the place.

If using google forms to send to parents, ensure that those without easy access to this medium are not disadvantaged, e.g. on a first come, first serve basis, consideration needs to be given to communication.

When parents are asked for permission they should always be prompted to provide details of any medical or health needs, including medication they will require. This ensures that the school have the most up to date information possible at the time of the visit. The same must be done with emergency contact names and telephone numbers.

SUBMISSION - 6 WEEKS PRIOR TO VISIT

\*\*\*FULL EVOLVE RECORD TO BE SUBMITTED AT LEAST 6 WEEKS IN ADVANCE OF THE EDUCATIONAL VISIT INCLUDING ALL RISK ASSESSMENTS\*\*\*



Check the itinerary for any learning resources and work books that are required on the visit.  
Revisit permissions and notifications to parents (including photo consent), as well as tracking what parental payments have been received (if applicable).

Track confirmations that staff that are required to have confirmed that they have read the visit folder contents.

#### Planning - 2-3 days before educational visit

Consider if text / email reminder is needed for parents and students regarding the details of the visit and what is required to be taken on the day.

Final check with First Aider that the most up to date medical needs and list of medication is complete.

Check tide times (if appropriate).

Check weather forecast.

Ensure school 'trip mobile' is available and charged and consider, based on the ages of students and the activities planned, if students need this number on the day of the visit, so that a staff member is contactable at all times for students during the visit. If the visit is out of school hours, one of the 'trip phones' should remain with a staff member at school to ensure that there is a point of contact for parents.

Ensure that any risk assessments (or component parts of risk assessments) are shared with students, unless this is to be done on the day of the visit.

#### Planning day of educational visit

Final check of visit folder and that printed and electronic copies are shared and stored with the correct staff.

Final check of parental consent (including photo consent) for those visits requiring parental permission.

Collect school meals for those students eligible for free school meals

Collect and check medicines and individual healthcare plans

Collect and check first aid kit (if required)

Collect sick bags and rubbish bags

Collect trip mobile

Ensure that any risk assessments (or component parts of risk assessments) are shared with students.

Ensure that attendance (secondary) are aware of which students have actually left on the visit.

#### Planning following the educational visit

Ensure that any confidential information taken on the visit is either returned or securely disposed of.

Ensure that any behaviour incidents, safeguarding incidents or accidents / near misses, are reported to the relevant people and recorded on the relevant management information systems.

Complete any feedback forms required.

Debrief with staff involved to identify successes and learn any lessons that are useful for future educational visits - PLEASE ENSURE THAT LESSONS ARE SHARED ACROSS THE TRUST TO HELP IMPROVE OUTCOMES FOR STUDENTS AT ALL SCHOOLS –

