



**Cabot**  
Learning  
Federation

Offsite trips  
and  
adventurous  
activity  
Guidance

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### 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
August 23	1.0	Reinforcement of the need to use the OEAP guidance which CLF follow when planning trips	Stronger message and signposting
August 23	1.0	Definition of Cat A, B and C visits early on in document	Clarity
August 23	2.8	Approval to take place at Academy level before being submitted to Trust	Clarity of process
August 23	2.11	Students not attending/known to the academy, not supported attending Academy trips	Clear message
August 23	2.6	Hybrid activities not defined by AALA	National guidance
August 23	2.25	Addition of preparing a Plan B in preparation for the trip	Dynamic assessment/ OEAP guidance
August 23	2.26	Ensuring an emergency plan is in place, referring to the Academy Critical incident plan, with emergency numbers published for both in and out of hours.	OEAP guidance
August 23	4.2	Addition of timescale of accredited EVC training every 3 years	OEAP guidance
August 23	4.2	Ensuring both Plan B are available, and emergency procedures are in place	OEAP guidance
August 23	4.3	If any new activities taking place not undertaken before- check that correct level of competence either by provider is checked, or if member of staff leading-qualifications are checked.	OEAP Guidance/Best Practice
August 23	4.5	Hybrid Activities not defined by AALA but of adventurous nature	OEAP Guidance
August 23	4.8	Health and Safety team will randomly spot-check and challenge planning of all categories of trip	Best Practice
August 23	5.2	Staff leading trips must have undertaken risk assessment training and group leader training	OEAP Guidance

August 23	6.0	Addition of a model template and aide memoire for trips	Best Practice- ease of completion of risk assessments
August 23	6.0	All staff undertaking trip risk assessments must have undertaken risk assessment training available on Nimble and /or via EVC training or Group leader/ visit training	HASAWA, Management Regs, OEAP guidance
August 23	6.0	Copy of the risk assessments should be available at point of use on the trip	Best Practice
August 23	11.0	Reference of DSL re checking of students attending trips and contextual risk assessment	OEAP Guidance
August 23 New Section	15	Use of Travel cards (access to Funding whilst on the trip) for academy trips	CLF Finance
August 23	19	Exclusions around CLF Insurance	Policy
August 23 New section	22	Added section on selecting hired coaches/ minibuses from approved list within Evolve- An operator licence check has been undertaken and added to an approved list of providers	OEAP guidance
August 25	Whole document	Reviewed and updated guidance to ensure alignment with current regulations and streamlined content for clarity and ease of use	
August 25	Appendices	Streamlined content by removing appendices and replacing them with direct links to relevant resources	

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## Introduction

Offsite and outdoor learning experiences offer invaluable opportunities for students to develop skills, confidence, and independence beyond the classroom. These experiences foster curiosity, resilience, and personal growth, while also helping students become risk aware, an essential life skill.

This guidance outlines the expectations and procedures for planning and managing educational visits across the Trust. It aligns with the **Outdoor Education Advisers' Panel (OEAP) National Guidance**, which CLF adopts to meet its statutory responsibilities for offsite activities. Staff must refer to this guidance, available via the **Resources tab on Evolve**, when planning any trip.

Most visits proceed safely and successfully due to thorough planning, effective supervision, and sound risk management. While no activity is entirely risk free, careful preparation significantly reduces the likelihood and impact of incidents.

All trips must be planned and recorded using **Evolve**, the Trust's designated system for managing offsite visits. This ensures consistency, accountability, and safety across all academies.

### 1 Reference to other relevant policies

CLF Health and Safety Policy 2025-2026

Academy Health and Safety Policy 2025-2026

Academy Safeguarding Policy 2025-2026

### 2 Legislation or non-statutory guidance

Health and Safety at Work etc. Act 1974

Management of Health and Safety at Work Regulations 1999

Children Act 1989 and 2004

Equality Act 2010

Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 2013

Keeping Children Safe in Education (KCSIE)

Adventure Activities Licensing Authority (AALA)

OEAP National Guidance

Department for Education: Health and Safety on Educational Visits

Health and Safety Executive (HSE) Guidance on School Trips

Council for Learning Outside the Classroom (LOtC) Quality Badge

Adventure Mark

### 3 Statement

The Cabot Learning Federation (CLF) is committed to providing high-quality, safe, and enriching offsite learning experiences for students. To ensure best practice and compliance with legal responsibilities, CLF has adopted the **Outdoor Education Advisers' Panel (OEAP) National Guidance** as the foundation for managing educational visits and adventurous activities. This guidance is accessible via <https://oeapng.info/> and is linked on the CLF Evolve system.

Where there is any conflict between OEAP guidance and CLF procedures, CLF procedures take precedence. Staff should seek clarification from their Academy Educational Visits Coordinator (EVC) or the Central Health and Safety Team.

All trips must be categorised according to the level of risk and complexity:

- **Category A** – Low-risk activities in familiar environments, e.g. local area walks, parks, shops, and field studies.
- **Category B** – Activities with moderate risk, e.g. visits to beaches, cycling, museums, and National Trust sites.
- **Category C** – Higher-risk activities including residential, overseas trips, outdoor and licensed adventurous activities.

All Category C visits must be planned, risk assessed and approved via the **Evolve system** by the EVC and Principal before submission to the Trust for final sign-off.

Staff involved in planning or leading visits must understand the legal framework surrounding adventure activities. Certain activities—such as caving, climbing, trekking, and water sports require providers to hold a licence under the **Adventure Activities Licensing Regulations 1996**, administered by the **Adventure Activities Licensing Authority (AALA)**. This licence assures safety standards but not educational quality.

Some hybrid activities not covered by AALA (e.g. gorge walking, plunge pooling) must only be led by qualified staff or accredited providers with relevant national governing body awards.

CLF recognises the **Learning Outside the Classroom (LOtC) Quality Badge** as the national benchmark for both safety and educational value across a wide range of providers. This badge is endorsed by the Department for Education.

Each visit must have a designated and competent group leader, approved by the Principal and EVC, with a deputy leader appointed. Risk assessments must be completed for all visits, using CLF templates.

CLF does not permit staff to bring their own children or include students not enrolled at the academy on trips.

Educational objectives must be clearly defined early in the planning process. Providers must submit a completed OE01 declaration form if they are new or have not been used recently.

Trip documentation including risk assessments, itineraries, and consent forms must be uploaded to Evolve within required timescales. Staff must read and sign to confirm understanding of their roles and responsibilities.

Planning must include contingency arrangements for illness, infectious disease, and emergency scenarios, aligned with the academy's Critical Incident Plan.

Supervision levels must be appropriate to the group's needs and risks. Pre-visits are strongly recommended; if not possible, sufficient background information must be gathered.

Trip evaluations must be completed on Evolve, including learning from incidents or near misses. A 'Plan B' must be prepared for all activities.

CLF enforces a zero-tolerance policy on alcohol, recreational drugs, and legal highs for both students and staff during trips.

Appropriate clothing and equipment must be provided. Parents/carers must be informed in writing, and staff must be briefed and sign off on all planning documents.

Where uncertainty exists, staff must seek advice from the Central Health and Safety Team or relevant national governing bodies.

#### **4 Evolve (Trips Management System) – Mandatory for CLF Academies**

Evolve is the CLF's approved online platform for planning, managing, and approving all offsite educational visits. It must be used for documenting and processing all trip categories (A, B, and C – see definitions below), ensuring appropriate approval at each stage.

Staff accounts should already be set up within your academy. If you are leading a trip and cannot access Evolve, please contact your Educational Visits Coordinator (EVC).

Some supporting documents, such as the initial trip proposal form, model parental consent forms, and risk assessment templates, are managed outside of Evolve. These are available in the appendices of this document.

For further guidance on using Evolve visit the help centre on Evolve [here](#).

#### **5 Roles and Responsibilities**

The Cabot Learning Federation (CLF) has adopted the **Outdoor Education Advisers' Panel (OEAP) National Guidance** in full as the foundation for planning and managing all educational visits and offsite activities. This ensures a consistent, safe, and high-quality approach across all schools/academies within the Trust.

Roles and responsibilities for key individuals including Academy EVCs, Principals, Councillors, Group/Visit Leaders, accompanying staff, volunteers, and students are defined in line with OEAP guidance. These roles are essential for ensuring accountability, effective planning, and safe delivery of all visits.

For detailed role descriptions, see: [OEAP guidance on roles](#)

The following section outlines the specific responsibilities of each role within CLF to support the effective and safe management of educational visits.

### 5.1 Academy Council

Academy Councillors are expected to provide constructive scrutiny and support by:

- Ensuring formal notification and approval procedures are in place and align with employer and national guidance.
- Confirming that the academy is following CLF's educational visits policy and OEAP guidance.
- Maintaining awareness of the types and frequency of trips taking place.
- Ensuring a trained Educational Visits Coordinator (EVC) is appointed and supported.
- Including school trips as a standing item on Health and Safety Committee agendas.
- Referring to OEAP document 3.3c: *Management Board and Governor Checklist* for further guidance.

For more information on governance roles in educational visits, see: [oeapng.info/governors](http://oeapng.info/governors)

### 5.2 Principal / Headteacher

The Principal holds overall responsibility for the authorisation and oversight of all educational visits within their academy. Their key responsibilities include:

- Authorise all offsite visits (Categories A, B, and C) via the Evolve system.
- Appoint and support a trained Educational Visits Coordinator (EVC).
- Ensure timelines for trip approval are understood and followed.
- Confirm robust procedures are in place for the planning and management of trips.
- Ensure staff are trained, competent, and appropriately qualified to lead visits and activities.
- Verify that students agree to and follow a safe code of conduct during trips.
- Ensure the Academy Council is informed of visits, as required by academy policy.
- Review and approve risk assessments, especially for new or high-risk activities.
- Seek advice from the Central Health and Safety Team regarding staff qualifications for adventurous activities, particularly if school-led.
- Permit the Central Health and Safety Team to approve Category C trips by first authorising them at academy level via Evolve.
- Ensure emergency procedures are in place and understood by staff.
- Refer to OEAP documents 3.3b and 3.4g (*Head/Managers Checklist*) for further guidance.

Further guidance is available at: [oeapng.info/head-manager](http://oeapng.info/head-manager).

### 5.3 Educational Visits Coordinator (EVC)

The EVC acts as the lead advisor on educational visits within the academy and plays a central role in ensuring trips are planned, approved, and delivered safely and effectively. Their responsibilities include:

- Ensure all offsite visits (Categories A, B, and C) are planned and approved using the Evolve system within appropriate timescales.
- Support staff in planning, risk assessment, and trip organisation.
- Confirm that all trips are correctly logged and authorised via Evolve.
- Liaise with the Central Health and Safety Team and Trust for Category C visits (residential, overseas, and adventurous activities).
- Maintain records of visits and monitor evaluations to support continuous improvement.
- Oversee planning to ensure visits are well-managed, engaging, relevant, and memorable.
- Verify that staff leading trips are competent and appropriately qualified; raise concerns with the Principal or Health and Safety Team.
- Ensure suitable and sufficient risk assessments are completed, including a clearly assessed 'Plan B'.
- Confirm emergency arrangements are in place, including designated emergency contacts for each visit (see OEAP document 4.1d: *Emergencies and Critical Incidents*).
- Ensure correct levels of authorisation are applied for each visit.
- Authorise on-site activities (non-residential and non-adventurous) where appropriate, provided initial approval has been given by the Principal or SLT.
- Refer to OEAP documents 3.4j and 3.3a (*EVC Role and Checklist*) for further guidance: [oeapng.info/evc](http://oeapng.info/evc)

### 5.4 Group / Visit Leader

The Group or Visit Leader is the designated individual responsible for the planning, organisation, and safe delivery of an educational visit. This role carries overall responsibility for the safety and conduct of students and staff throughout the trip.

Key responsibilities include:

- Be approved by the Principal and EVC to lead the visit, including any specific activities.
- Undertake appropriate training, such as external Group Leader training via EduFocus (see: UVLT — EVOLVE Advice).
- Liaise with the EVC to ensure the visit has clear aims and balances benefits and risks.
- Ensure all documentation, including risk assessments and itineraries, is completed and uploaded to Evolve.

- Lead the planning and risk management process, involving the leadership team and students where appropriate.
- Define roles and responsibilities for accompanying staff, first aiders, helpers, and participants.
- Ensure effective supervision and appropriate supervision ratios.
- Appoint and brief a deputy leader to take over if necessary.
- Prepare and assess a suitable 'Plan B' in case the original activity cannot proceed.
- Ensure robust emergency procedures are in place and understood by all staff.
- If using external providers for Category C activities, confirm they hold relevant National Governing Body (NGB) accreditations and, where applicable, an AALA licence.
- For Category C activities not covered by AALA (e.g. indoor climbing, placid water canoeing, gyll scrambling), ensure providers or academy staff hold valid NGB qualifications or are approved by a qualified technical advisor. These qualifications must be uploaded to Evolve and verified by the Principal and Trust.
- Lead the visit safely, respond to incidents, and ensure all participants are briefed appropriately.

Further guidance is available in OEAP documents:

3.4k – Group/Visit Leader Role

3.3e – Group/Visit Leader Checklist

## 5.5 Deputy Group/Visit Leader

The Deputy Group or Visit Leader supports the Group Leader and must be prepared to assume full leadership if required. This role is essential for maintaining continuity and safety throughout the visit.

Key responsibilities include:

- Be sufficiently competent and confident to take over leadership if the Group Leader is incapacitated.
- Be familiar with the visit plan, risk assessments, supervision arrangements, and emergency procedures.
- Understand the establishment's and employer's policies and procedures relevant to the visit.
- Be actively involved in the planning and preparation of the visit, including contributing to risk management.
- Clearly understand your assigned responsibilities and how they align with the wider leadership team.
- Be aware of 'Plan B' arrangements and how they would be implemented.
- Understand hand-over and hand-back procedures for supervision between staff and third-party providers.

- Maintain effective communication with the Group Leader and other staff throughout the visit.

Further guidance is available in OEAP document:

3.4I – Assistant Leader Role

## 5.6 Accompanying Staff / Volunteers

Accompanying staff and volunteers play a vital role in supporting the safe and effective delivery of educational visits. Their responsibilities include:

- Follow instructions from the Group/Visit Leader and support the supervision of students as directed.
- Be fully briefed on the visit plan, including their specific roles, allocated tasks, risk assessments, and itinerary.
- Be familiar with the visit's risk management measures and emergency procedures.
- Understand the establishment's and employer's policies and procedures relevant to their role.
- Be actively involved in planning and preparation where appropriate, contributing to risk management and supervision arrangements.
- Be clear about hand-over and hand-back arrangements for supervision between staff and third-party providers.
- Promptly report any concerns, incidents, or near misses to the Group Leader.

Further guidance is available in OEAP documentation:

Establishment Roles – OEAP Guidance

## 5.7 Central Health and Safety Team

The Central Health and Safety Team, including the Head of Health and Safety and Health & Safety Officers, are the designated CLF Educational Visits Coordinators (EVCs) at Trust level. Their responsibilities include:

- Reviewing and approving all **Category C** visits (residential, overseas, and adventurous activities) once authorised by the Principal via Evolve.
- Providing specialist advice on risk management and adventurous activities.
- Supporting academies with staff training, compliance monitoring, and trip planning queries.
- Conducting random spot checks on **Category A and B** trips to ensure planning and approval standards are met.
- Advising on staff qualifications and competence for adventurous activities, particularly where trips are school-led.

Please note: Late submission of Category C trips may result in delays or non-approval, which could prevent the trip from going ahead.

## 5.8 Parents / Carers

Parents and carers play a key role in supporting the safe and successful delivery of educational visits. Their responsibilities include:

- Providing informed consent for their child's participation in the visit.
- Ensuring their child is appropriately prepared with suitable clothing, equipment, and any required documentation.
- Communicating any relevant medical, dietary, or welfare needs to the academy in advance.

## 5.9 Students

Students participating in educational visits are expected to:

- Attend pre-trip briefings and understand the expectations and safety procedures.
- Follow the academy's code of conduct throughout the visit, including any additional instructions provided by staff.
- Behave responsibly and contribute to a safe and positive experience for all.
- Report any concerns, incidents, or issues to staff promptly.

These responsibilities support the safe and successful delivery of the visit and reflect the standards set out in the academy's behaviour policy.

## 6 Trip Categories and Approval Procedures

Educational visits within CLF are categorised into three levels based on the nature and risk of the activity. These categories help determine the planning, risk assessment, and approval process required.

### Category A – Routine, Low-Risk Visits

These include visits to local parks, museums, theatres, churches, nature trails, and fieldwork in familiar environments. They present no greater risk than everyday life and typically require minimal additional planning.

**Approval:** Must be reviewed and authorised by the Academy EVC and Principal via Evolve. These do not require notification to the Central Health and Safety Team.

### Category B – Moderate-Risk Activities

These involve activities with increased risk, requiring additional planning and staff competence. Examples include cycling, beach visits, orienteering, horse riding in non-remote areas, and fieldwork in upland or coastal areas.

**Approval:** Must be reviewed and authorised by the Academy EVC and Principal via Evolve. These do not require notification to the Central Health and Safety Team but may be subject to random spot checks.

### Category C – High-Risk, Residential, Overseas, or Adventurous Activities

These include residential trips, overseas visits, and activities in hazardous environments or involving specialist skills. Many fall under the scope of the **Adventure Activities Licensing Authority (AALA)**, including:

- Climbing and abseiling
- Caving
- Trekking
- Water sports

Other adventurous activities not covered by AALA (e.g. indoor climbing, canoeing on placid waters, plunge pooling) must still meet national governing body standards and be led by qualified staff or licensed providers.

**Approval:** Must be submitted via Evolve to the Central Health and Safety Team **at least six weeks in advance**. The Principal must first authorise the trip at academy level. Late submissions may not be approved.

#### Additional Notes:

- Each activity within a trip must be risk assessed individually.
- Group Leaders must be trained, competent, and supported by the EVC.
- Newly qualified staff should not lead trips until they have gained experience, including acting as an assistant leader.
- Risk assessments must be completed by staff with appropriate training (e.g. Nimble or UVLT training).
- Staff acting *in loco parentis* must exercise the same care as a reasonable parent. This duty applies continuously during the visit and cannot be delegated.
- Parental consent is required for all students under 18.

For further guidance, refer to OEAP documents and training resources:

[OEAP National Guidance](#)

## 7 Risk Management

Effective risk management is central to the safe planning and delivery of educational visits. It involves identifying potential risks and implementing proportionate control measures to ensure that the benefits of the activity justify any residual risk.

Risk management should follow a structured approach:

1. Identify the benefits and risks associated with the activity.
2. Plan to maximise benefits and manage risks, ensuring they remain within acceptable levels.

Risk assessments must be embedded in the planning process and uploaded to the Evolve system. These include:

- Generic risk assessments: applicable across similar activities with minor adjustments.

- Visit-specific risk assessments: tailored to the location, group, and activity.
- Dynamic risk assessments: conducted in real-time during the visit to respond to changing conditions (e.g. weather, group behaviour), with readiness to implement a pre-assessed *Plan B* if needed.

All staff involved in writing or reviewing risk assessments must have completed appropriate training, such as Nimble modules or Group Leader/EVC training. Risk assessments should be carried on the visit, referenced as needed, and stored appropriately post-visit.

The competence of the Group/Visit Leader and accompanying staff is critical. Leaders must be supported by the EVC and not expected to plan visits without guidance. Newly qualified staff should gain experience before leading visits, ideally by first acting as assistant leaders.

For further guidance, refer to OEAP documentation: Visit Leader Guidance – OEAP

## **8 Information, Training and Instruction**

To support staff in safely managing offsite visits and activities, CLF provides access to a range of resources, training, and guidance:

- Health and Safety Manual available on CLiF
- Evolve system resources, including question sets and planning tools
- OEAP National Guidance documents
- Evolve training via Nimble or face-to-face sessions; additional support is available within Evolve by selecting the red question mark and choosing “Evolve Visits”
- Mandatory Health and Safety induction for all new staff
- EVC and Group/Visit Leader training
- Risk assessment training available on Nimble and embedded in trip-specific training
- Pre-trip planning discussions with the Academy EVC

Staff must complete relevant training before leading or supporting trips. Newly qualified staff should gain experience by accompanying visits before taking on leadership roles.

## **9 Competency of Staff**

Staff leading or supporting educational visits must be competent to do so. Competence is defined by the Health and Safety Executive as a combination of training, skills, experience, and knowledge, along with the ability to apply these effectively and safely.

Academies must ensure that staff have the appropriate qualifications and experience for the activities they are undertaking. The Evolve system allows staff to upload relevant qualifications, which can then be reviewed by the Academy EVC and Principal during trip approval.

When assessing competence, consider:

- AALA licence (where applicable)
- LOtC Quality Badge

- National Governing Body (NGB) awards
- National Vocational Qualifications (NVQs)
- Offsite Management Certificates (e.g. OCR)
- Site-specific experience and local knowledge
- Observation and validation by a qualified person

The Academy EVC and Principal must assess the suitability and competence of the Group/Visit Leader during the initial approval stage. Staff should not lead trips unless they have received appropriate training, guidance, and support, and have demonstrated competence through prior experience.

For further guidance, refer to OEAP documentation: OEAP Guidance – Visit Leader Competence

## 10 Assessing Providers and Venues

When selecting external providers or venues for educational visits, academies must ensure safety, quality, and suitability through appropriate checks and risk assessment.

Accreditation:

- AALA Licence: Required by law for providers offering activities under the Adventure Activities Licensing Regulations (e.g. caving, climbing, trekking, water sports). This licence confirms safety standards but not educational quality.
- LOTC Quality Badge: A nationally recognised accreditation for safety and educational value. While not mandatory, it is strongly recommended. If a provider does not hold the LOTC badge, they must complete a Provider Declaration Form (OE01). You can check accreditation status at [lotcqualitybadge.org.uk](http://lotcqualitybadge.org.uk).

Venue Assessment

- Use the KADDI database on Evolve to search for vetted venues and read reviews from other schools.
- A preliminary visit is strongly recommended, especially if the venue is unfamiliar or has undergone changes (e.g. staffing, layout). This supports effective planning and risk assessment.
- If a pre-visit is not possible, alternative methods must be used to assess suitability, such as:
  - Consulting staff with prior experience at the venue
  - Reviewing previous trip reports
  - Using reliable local guides

A dynamic risk assessment on arrival such as a walkthrough by the visit leader while the group remains in accommodation can help identify any last-minute concerns.

For further guidance, refer to:

- OEAP Guidance – Assessing Providers and Venues

## 11 Consent

Consent from parents or carers is a key requirement for educational visits involving students under the age of 18. In most cases, consent should be obtained from the resident parent, unless there is a legal obligation or prior agreement to involve both parents. Where both parents' consent is required or requested, schools should assume that consent is not given unless both parties agree. This ensures fairness and helps protect the academy from potential liability.

Consent must always be informed. Parents should receive clear and proportionate information about the visit, including its purpose, activities, supervision arrangements, and any associated risks. The method and level of communication should reflect the nature and complexity of the visit:

- Routine activities (e.g. sports fixtures or cultural visits) may be covered by seasonal or termly communications, with updates shared via note, phone, email, or text.
- Complex or higher-risk visits (e.g. residential, adventurous activities, or overseas travel) require detailed written information and, where appropriate, parent briefings or meetings.

In line with OEAP guidance and the Education Act 2002 (Section 29), individual parental consent is not required for offsite activities that:

- Take place during normal school hours,
- Are part of the standard curriculum,
- Do not involve increased risk (e.g. local walks, visits to libraries or places of worship).

To support this, CLF recommends obtaining annual blanket consent for low-risk, local visits during school hours. This can be communicated at enrolment and refreshed each academic year via consent forms, policy documents, or the school website. While parents cannot withdraw their child from curriculum-based activities, it remains best practice to keep them informed.

Visit-specific consent is required for:

- Activities outside normal school hours,
- Higher-risk activities (e.g. adventurous or residential visits),
- Visits involving third-party providers who require their own consent forms.

In these cases, schools must ensure that parents receive sufficient information to make an informed decision, and that up-to-date medical information is also collected where appropriate.

Note: While the Department for Education suggests a blanket consent form for all trips, CLF does not endorse this approach. Instead, CLF supports annual blanket consent for low-risk, curriculum-based visits only.

For further guidance, refer to OEAP documentation:

- Parental Consent – OEAP Guidance

## 12 Inclusion

- Educational visits must be planned to be inclusive and accessible to all students, regardless of medical needs, special educational needs, or protected characteristics. Schools have a duty to make reasonable adjustments and take all practicable steps to ensure full participation.
- Inclusion should be embedded in both policy and practice, ensuring:
- All students have the opportunity to participate.
- Activities and venues are adapted or modified where necessary.
- Students are integrated and able to engage alongside their peers.
- A list of students with medical needs, allergies, SEND, or safeguarding concerns should be compiled early in the planning process. Support arrangements should be made in consultation with the SENCO and/or Designated Safeguarding Lead (DSL). Where appropriate, individual risk assessments must be completed and submitted via Evolve.
- Once the participant list is confirmed, the DSL must review it to identify any safeguarding considerations or contextual risks that may affect the visit. These risks should be discussed with the visit leader and addressed through appropriate planning.
- For further guidance, refer to:
- OEAP Guidance – Inclusion
- OEAP Guidance – Medication
- OEAP Guidance – Staff Ratios

## 13 Ratios and Supervision

Academies must ensure that staffing arrangements for educational visits enable effective supervision of students. Staffing decisions should be based on risk assessment and take into account:

- The nature, duration, and location of the visit
- Planned activities and associated risks
- Group characteristics (e.g. age, ability, medical or behavioural needs)
- Staff competence and experience
- Contingency planning in case a staff member becomes unavailable

There are no fixed staff-to-student ratios; instead, ratios should be determined through risk assessment. Historical guidance such as HASPEV (DfE, 1998) offers starting points for consideration:

- Years 1–3: 1:6
- Years 4–6: 1:10–15
- Year 7 onwards: 1:15–20
- Residential/overseas: 1:10

These ratios may be insufficient for complex or higher-risk visits. For Early Years, the statutory framework no longer specifies different ratios for outings; however, ratios should still be reviewed and adjusted based on risk, often exceeding the legal minimum. In some cases, a 1:1 ratio may be necessary.

If a visit involves a sole leader, students and any adult helpers must be briefed on what to do if the leader becomes ill or injured, including how to contact the school for support. For remote or overseas visits, supervision plans must account for scenarios where a leader may need to leave the group (e.g. to accompany a student to hospital).

There is no legal requirement for staff of both genders to accompany students, even on residential. However, where this is not possible, a clear plan must be in place to address privacy, safeguarding, and pastoral care.

For further guidance, refer to:

- OEAP Guidance – Ratios and Effective Supervision

#### **14 Emergency Procedures and Incident Reporting**

Group and visit leaders must ensure robust emergency planning is in place before any trip. This includes:

- Carrying emergency contact information, securely stored and disposed of after the visit.
- Agreeing contact numbers in advance, including out-of-hours contacts (e.g. Principal, Health & Safety Lead, reception, nearest hospital).
- Including emergency arrangements as part of the risk assessment.
- Preparing contingency plans (e.g. Plan B) for unexpected changes, including illness or infectious disease outbreaks such as COVID-19.
- For overseas visits, carrying details of the nearest British Embassy or Consulate (available via Foreign, Commonwealth & Development Office).

Each residential visit must have a designated emergency contact at the academy who is not attending the trip. This person must have access to all trip documentation via Evolve and be familiar with the visit plan.

In the event of a critical incident, the academy's Critical Incident Management Plan must be activated.

All personal data taken on visits must be protected in line with GDPR. If hard copies are used, they must be securely stored and handled. Further guidance on data protection is available in the CLF Employment Manual on CLiF.

Resources and templates for emergency planning can be found on Evolve and the OEAP website:

- OEAP Guidance – Emergency Planning

#### **15 Accident, Incident, Near Miss, and First Aid**

In the event of an accident, incident, or near miss during a visit, staff must follow the procedures outlined in the academy's Health and Safety Policy and local arrangements.

All trips must have appropriate first aid provision, determined through risk assessment. Factors to consider include:

- Location and remoteness of the visit
- Nature of activities

- Group size and needs
- Staff availability and competence

For Early Years Foundation Stage (EYFS) outings, at least one accompanying adult must hold a current paediatric first aid certificate and be able to summon help.

If a student requires hospital treatment, an adult must accompany them and remain with them until a parent or carer arrives. The academy and parents must be informed promptly.

Accident reporting should be completed using the online system. If this is not accessible during the visit, paper forms should be used and uploaded upon return.

Examples of first aid requirements:

- Urban/local visits (e.g. walk to a library): basic first aid knowledge and mobile phone access may suffice.
- Remote/rural visits: a qualified first aider and mobile first aid kit are essential due to limited emergency access.
- Nursery outings: a paediatric first aider must be present.

All first aid arrangements must be proportionate to the risks identified during planning.

For further guidance, refer to: OEAP Guidance – First Aid and Medical Needs

## **16 Volunteers**

When using volunteers to support educational visits, academies must follow established procedures, including:

- Vetting requirements, including when an enhanced DBS check is necessary
- Minimum standards for induction and training
- Assessment of volunteer competence for their assigned role
- Clear supervision arrangements
- Adherence to HR guidance on the use of volunteers

Volunteers may assist with organisation and supervision but must:

- Hold enhanced DBS clearance
- Be clearly briefed on their role and responsibilities
- Receive and understand relevant risk assessments
- Act with the same duty of care as a responsible parent or carer

## **17 Behaviour**

Expectations for student behaviour during educational visits must be clearly communicated to both students and parents in advance. It is good practice to formalise this through a behaviour contract or code of conduct, signed by both parties before the trip.

The code should outline:

- Expected standards of behaviour
- Unacceptable conduct
- Sanctions that may be applied, including those enforceable while off-site

This helps ensure a safe, respectful, and positive experience for all participants.

## 18 Insurance

CLF provides comprehensive annual insurance for authorised off-site activities. The policy covers:

Insured persons:

- Enrolled students
- Teaching and support staff employed by CLF
- Authorised volunteers, assistants, or helpers
- Other children authorised by CLF to participate

Coverage includes:

- All organised trips outside academy boundaries
- For day trips: cover begins upon leaving and ends upon return to academy boundaries
- For overnight trips: cover extends from home to the official assembly point and from the dispersal point back home

Exclusions:

- Staff or volunteers over 70 years of age (e.g. SMSAs, exam invigilators—check with HR)
- Individuals travelling against medical advice
- Travel during periods when government advice restricts overseas or UK travel.

Excluded activities:

- Motorcycling, racing (except on foot), aerial pursuits (e.g. ballooning, gliding, parachuting)
- Jet skiing, white-water rafting
- Mountaineering or climbing with ropes/guides
- Hiking above 3,000 metres
- Caving with equipment
- Diving with external breathing apparatus.

Included winter sports (with appropriate supervision and training):

- Skiing, snowboarding, curling, skating, skibobs, toboggans
- Use of nursery slopes and ski lifts under qualified instruction

If an activity falls outside the standard cover, separate insurance must be arranged.

For further information, contact: Heidi Clement Deputy Director of Estates and Facilities Email:

[heidi.clement@clf.uk](mailto:heidi.clement@clf.uk)

## 19 Transport

Academy Minibus Use

Minibuses must only be driven by staff who hold a valid MIDAS certificate. The academy must:

- Conduct annual driving licence checks
- Ensure pre-use vehicle checklists are completed and retained on the vehicle
- Maintain a robust servicing and maintenance schedule with records

Refer to the Academy Minibus Policy in the Evolve resources section for full guidance.

Hiring Coaches, Minibuses, and Taxis

Only transport providers from the approved list on Evolve should be used. These providers are checked annually for valid operator licences. If a chosen provider is not listed, contact the Health and Safety team before booking.

When using taxis:

- Ensure the vehicle displays a valid local authority licence
- Confirm the driver has a visible ID badge and photo ID plate
- All identification must match and be current

These checks help ensure compliance with safeguarding, transport safety standards, and duty of care obligations.

For further guidance, refer to:

- Academy Minibus Policy (Evolve)
- OEAP Guidance – Transport and Provider Assessment
- Department for Transport: 0300 330 3000

## **20 Travel Cards and UK Global Health Insurance Card (UKGHIC)**

### Travel Cards

CLF travel cards are a secure method for managing trip-related expenses, particularly when travelling overseas. As prepaid cards, they offer limited protection in cases of non-delivery or disputes, so wherever possible, trip costs should be paid in advance using preferred purchasing routes. This reduces financial risk and ensures compliance with CLF financial regulations.

Travel cards should be used instead of cash when abroad to enhance security. For guidance on managing trip expenditure, refer to the Trip Expenditure Hierarchy in CLF Financial Regulations or consult your Finance Advisor.

### Planning for Emergencies

When planning trips—especially to major cities or overseas—consider the potential for disruption due to incidents such as terrorism. Risk assessments should include contingency planning for such scenarios. Refer to OEAP guidance on managing risks related to terrorist activity.

### UKGHIC (formerly EHIC)

The UK Global Health Insurance Card allows access to state-provided healthcare in EU countries and other agreed nations. It is recommended that students obtain a UKGHIC before travelling abroad. This card complements, but does not replace, CLF's travel insurance policy.

For more information:

- UKGHIC – NHS Guidance
- CLF Financial Regulations (available via CLiF)
- OEAP Guidance – Emergency Planning

## **21 Internal forms and templates**

[OE1 Provider Declaration form](#)

[OE2 Initial Visit Proposal form](#)

[OE3 Parental consent form](#)

[OE4 Educational Visits Adult Information form](#)

## **22 Reference documents**

[Visit Planning mind map](#)

[Visit Planning Flowchart](#)

[Visit Leader](#)

[Deputy Visit Leader](#)

[Educational Visits Coordinator EVC](#)

[Principal](#)

[Selecting an external provider](#)

[Residential](#)

[Overseas Visits](#)

[Adventure Activities](#)

[CLF Trips Risk Assessment \(STAGED\) - Template](#)

[CLF Trips Risk Assessment Guidance](#)

[SEND](#)

[AALA](#)

[HSE AALA accredited provider search](#)

[LOTC](#)

[Adventuremark](#)