



Policy for Educational Visits

**Reviewed by Health, Safety, Safeguarding and Premises Committee of the
Governing Body on 10th May 2017**

Further reviewed May 2018 and May 2020 by EVC Co-ordinator

Accepted by Governing Body 15th September 2020

Reviewed May 2022, Jan 2024, April 2025, March 2026

Signed _____

Chair of Governing Body

Next review: Feb 2027

This policy adopts Birmingham City Council's (BCC) Policy and Guidance for Educational Visits and Learning outside the Classroom incorporating the National Guidance from the Outdoor Education Advisers Panel (OEAP). The National Guidance can be found via www.oeapng.info (Accessed Feb 2026).

Ethos

At Walmley Infant School, we believe that our children should develop a love of learning and show care and respect for each other within the context of a happy, secure and challenging learning environment. At Walmley Infant School educational visits are planned to enhance the curriculum topics that are taught. A visit may be planned at any point during a term to enable the children to have learning opportunities brought to life.

Equal Opportunities -Inclusion and Entitlement

We have carefully considered and analysed the impact of this policy on equality and the possible implications for pupils with protected characteristics as part of our commitment to meet the Public Sector Equality Duty requirement to have due regard to the need to eliminate discrimination, advance equality of opportunity and foster good relations.

It is the responsibility of all staff to ensure that all children are treated equally, regardless of their background, gender, race or ability. We are an inclusive school and include all children in educational visits where reasonably possible, respecting individual needs. Through including visits in our provision, we provide learning opportunities for all pupils. We strive to meet the needs of all pupils including those with special educational needs, disabilities, More Able and Talented and those learning English as an additional language. (See Equality and Diversity Policy).

Educational visits are an integral part of the curriculum. All pupils or young people are entitled to participate irrespective of social background, culture, race, gender, differences in ability and disabilities.

Teachers will set appropriate learning challenges, responding to learners' diverse learning needs. Walmley Infant School will make provision, with well-planned reasonable adjustments, to support learners, enabling them where possible to participate effectively in all educational visits.

Teachers should take care not to cause indirect discrimination. For example, arranging a visit during a religious festival which might prevent certain pupils being able to attend.

Exclusion on the grounds of behaviour

It may be reasonable to exclude a young person where their behaviour presents a significant, unmanageable and unacceptable risk to the health, safety and welfare of either themselves, or other members of the group, or the leaders. The Equality Act protects people from discrimination and harassment based on the 'protected characteristics'. Where a young person has a behaviour difficulty that is not associated with a protected characteristic then it is unlikely that the Equality Act will apply.

When a young person is excluded on the grounds of behaviour alternative ways of achieving the same learning outcomes should be considered.

Where there is some doubt about including or excluding a young person on the grounds of their behaviour, the following points should be considered:

- identifying the issue at the earliest stage of planning.
- involving all interested parties.
- establishing a behaviour management plan with agreed action points that may enable inclusion on the visit.
- establishing behaviour targets and timescales to be met to allow inclusion, or trigger a decision to exclude.
- providing an additional adult, such as a parent or support worker, with a specific brief to manage behaviour issues.
- ensuring that what is expected of staff is reasonable and within their competence.
- recording this process.

Spiritual, Moral, Social and Cultural Development (SMSC)

SMSC is intrinsically linked to opportunities provided for through educational visits. Through planning visits, we aim to develop a positive attitude towards individuality and a respect for different cultures. Locations for visits are carefully selected to support and develop awareness of different cultures and faiths. Moral and social responsibility is also promoted.

UN Convention on the Rights of the Child

In 2017 Walmley Infant School became a UN Rights Respecting School.

The Convention has 54 articles that cover all aspects of a child's life and set out the civil, political, economic, social and cultural rights that all children everywhere are entitled to.

We aim to respect and promote the rights of the children through educational visits.

Definition of an Educational Visit

Any organised, off-site visit involving pupils or young people which requires the permission and approval from the Educational Visit Co-ordinator (EVC), Head Teacher and the parents/guardians of the pupils or young people attending. A visit may take place at any time of the year.

Key Points for all visits

- All Educational Visits must have clearly identified aims and objectives.
- All Educational Visits must have an approved competent Visit Leader who is a BCC employee.
- Approval for an Educational Visit and for the designated competent Visit Leader role is made by the Head Teacher or EVC.
- All visits must provide evidence of a prepared written risk assessment.
- Visit Leaders must carry copies of all supporting documentation on the visit, e.g. emergency contacts, itinerary, names and group details.
- EVCs must retain and record all supporting documentation centrally.
- Parents must be fully informed of all arrangements.

Roles and Responsibilities

The Head Teacher:

- must be consulted on any educational visit being organised and kept informed of arrangements, as necessary
- ensures that the EVC is aware of his/her duties and that a clear line of responsibility is established
- ensures that the EVC signs approval forms for Educational Visits
- ensures the EVC is competent, trained and is revalidated/accredited through Local Authority top-up courses every three years as a minimum through either full day EVC training, half-day EVC top-up training or EVC twilight training delivered by the Outdoor Learning Service
- makes sure through the Head Teacher's report, that Governors are kept informed of the nature and progress/success of educational visits
- ensures that medical and personal/address details for all pupils or young people are updated half yearly for repeat activities
- ensures that medical and personal contact details for all pupils or young people are collected prior to annual school trips
- considers insurance matters for educational visits and fully informs parents
- writes and fully informs parents regarding regular and repeated activity that is either on or off-site e.g. PE and sporting activity and fixtures or regular repeated programme of off-site educational visits
- ensures BCC policy for transporting children in cars is adhered to

- ensures there is an updated 'charging and remissions policy' that links to BCC and national guidance.

Educational Visits Co-ordinator

The Educational Visits Co-ordinator is currently Mrs L Whittall.

The EVC must:

- promote educational visits from the school and take a lead in policy development
- monitoring, INSET and other training for educational visits.
- approve all visits
- ensure the competency of the visit leader and all accompanying staff (consultation with the Head Teacher may be desirable/advisable on occasions)
- ensure the visit leader is a BCC employee
- ensure compliance with requirements of BCC's Policy and Guidance document 'Learning Outside the Classroom' and the National Guidance from the Outdoor Education Advisors' Panel
- ensure Educational Visit Approval Forms are completed appropriately.
- support and advise colleagues in planning visits
- ensure that appropriate risk assessments are completed and appropriate control
- measures are in place reducing risk to an acceptable level
- ensure that a 'collective discussion' regarding the 'risk assessment' process prior to the visit has taken place, this ensures ownership of the 'risk assessment' by the visit leader and all accompanying staff
- ensure that all staff are aware of educational visits procedures via documentation, staff training and relevant meetings
- check to ensure parents are kept fully informed of visit arrangements and details
- ensure accident and emergency procedures are in place and understood by all staff. Records of all accident reports and near misses are held centrally in the school by the EVC. Records of all visits are held centrally in the school by the EVC for every visit, which will include lists of all participants, risk assessments itinerary and programme information. These will be kept on record while children remain at Walmley Infant School
- ensure that appropriate staff records are collated for all educational visits and then stored; including checks on staff qualifications and driving details (including car insurance with business use if transporting pupils in own cars)
- review staff evaluations of trips.

Visit Leader, Teaching and Support Staff

The visit leader must:

- ensure there are clear educational aims for the visit, be specifically competent and approved as the Visit Leader by the Head Teacher and EVC
- understand the importance of the 'Collective Discussion' regarding the 'risk assessment' process prior to the visit, ensuring ownership of the 'risk assessment' by the visit leader and all accompanying staff
- ensure that all staff included on a visit must have a clear understanding of accident/emergency procedures
- ensure that all adults carry a Critical Incident Card which contains three phone numbers that can be used in case of an emergency these include: the school phone number, the Head Teacher's phone number and a phone number of school office staff.
- ensure that parents are kept fully informed of visit arrangements, details and itinerary
- plan the visit carefully and carry out risk assessments prior to visit and ensure that copies of these details are given to the Head Teacher and EVC at the agreed time
- take responsibility for giving appropriate and clear information regarding risk assessments and roles and responsibilities to any additional adult/volunteer helpers, if possible, invite them to take part in the 'Collective Discussion' to promote 'ownership'
- collate and check parental consent forms for all pupils
- complete a post-visit Evaluation Report and give this to the EVC. This should include any 'near miss' or incidents that require a review of the risk assessment and/or evaluation of outcomes against the stated aims
- take responsibility for ensuring that children are suitably briefed at all stages of the visit. All group members must be clear about rules and behaviour expectations. Children should be involved in the ongoing risk assessment
- take responsibility for the whole group and ensure that the following documentation is taken on all visits: all relevant pupil medical and consent information, the risk assessment including a Plan B, itinerary details, emergency contact details and 'Critical Incident' emergency numbers
- ensure that adequate first aid has been considered and provided for the visit and that first aid kits are taken along with individual children's medical kits and requirements as appropriate
- inform all staff and adult helpers of who is responsible for first aid. The risk assessment must show evidence that first aid has been considered
- ensure that transport for all visits meets LA guidance/standards. The itinerary, the arrangements and drop off and collection places must be checked and agreed upon

Thorough preparation for a visit must be undertaken. The EVC and the Head Teacher must be consulted regarding the arrangements, nature and purpose of the visit. The visit should have clear educational aims. The following must be addressed in further planning:

- Matters of supervision, Provider checks, content of the day(s) activities, first aid and transport must be considered and organised in advance.
- Additional risk assessments to be completed regarding children with additional needs, i.e. behavioural needs and/or physical/sensory needs/medical needs.
- Parents must be advised of the details of any visit and kept fully informed.
- All necessary permission/consent slips must be obtained.

All visits must be accompanied by at least two adults.

There is no legal limit with regard to pupil ratios but at Walmley Infant School we have agreed that the minimum adult/pupil ratio is as follows:

Pupil Age	Nursery	Reception	Years 1 and 2
Adult Ratio	1:2-3	1:3 - aged 4 Sept - Jan 1:5 - aged 5 Feb - July	1:6

It is good practice that all visits, both full day and overnight visits, with children over the age of 5 will have at least one accompanying adult, approved by the Head Teacher, of the same sex as the children. When planning a visit, the availability of accompanying adults of both sexes will always be seriously considered. If it is not possible for an adult of both sexes to go on an overnight visit, parents will be informed, in order for them to decide about whether they wish their child to attend.

How to undertake a risk assessment and who to submit it to

In addition to the above planning, a written Risk Assessment (a statutory requirement) must be made for any proposed educational off-site visit. It should:

- identify any significant risks which pupils or young people, staff and helpers may be exposed to and outline any control measures that will be put in place to reduce risks to an acceptable level
- be passed on to the EVC and Head Teacher for consultation and approval
- be kept with the Emergency Contact List and other planning and risk management documentation during the visit

The EVC should:

- check if the venue and/or provider have their own risk assessments and obtain a copy to support own risk assessment **not** to replace it
- ensure a suitable 'Collective Discussion' takes place regarding the 'risk assessment' prior to the visit, ensuring ownership of the 'risk assessment' by the Visit Leader and all accompanying staff. Any 'Generic' risk assessments must be changed, adapted or modified to suit the specific considerations and needs of the group during this discussion/meeting

The common risks to consider are:

1. Is the adult to child ratio adequate? The suggested outline is given above but this can depend on the place being visited or the nature of the visit. It is always better to err on the side of caution and if in doubt consult the Educational Visits Co-ordinator or Head Teacher.

2. Are there any behaviour, medical or SEND issues regarding the children being taken on the trip? It may be necessary to inform the venue or take additional adults and ensure these are considered and planned for on the risk assessment.

3. Is the form of transport suitable? Coaches must always be fitted with seatbelts and care must be taken to ensure children are always wearing them. Ensure transport company is informed of any wheelchair users so they can prepare adequately for this before departure.

4. Are there any dangers on the roads? If children are walking anywhere, routes need planning with care and roads crossed at the safest point, usually at a crossing.

5. What risks are at the venue? There are many considerations such as how the children will be supervised, is the venue open to the public, will there be contact

with animals, are the lakes, ponds or rivers nearby etc. If available use the risk assessment from the venue in conjunction with your own.

6. Where will lunch be eaten and where are the toilets? Lunch needs to be eaten in a safe place. Children should always ask an adult if they need to go to the toilet and be accompanied, reporting back on their return.

7. What steps should be taken to ensure children do not get lost? Frequent head counts should take place throughout the visit, particularly on arrivals, departures, on boarding and after leaving transport. Children should know what to do in the unlikely event of being separated from the party. Ensure children are wearing high visibility vests.

8. Does the weather pose a risk? Depending on the time of year the weather could create different risks. If it is hot and the children are outside, then they should be told to bring a hat and sunscreen. If it is cold, then they should wear warm clothes. Icy or very wet conditions could be a risk especially if children are walking, ensure suitable footwear is being worn e.g. walking boots/wellies/trainers.

9. Should children wear full school uniform? Is there any reason why they should not? Residential are suitable for children to wear non-uniform.

A preliminary staff visit should be made. Seek advice of Head Teacher or EVC. Risk Assessments and Educational Visits Approval forms must be passed on to the EVC/ Head Teacher approximately 1 week prior to the visit.

Dynamic Risk Assessment

The visit leader must be prepared to make 'ongoing' professional judgments related to assessment of risks.

Throughout a visit the leader should be aware of the surroundings and environment. There are situations where circumstances can change rapidly, and risks present themselves that had not originally been considered. In these circumstances the visit leaders should undertake a Dynamic Risk Assessment. The process is the same as a risk assessment, but it is done quickly and on the ground.

- Firstly, assess the new risk and its consequences and prioritise this against the welfare of the children and staff on the trip
- Come up with a plan that mitigates that risk (the best that is possible)
- Communicate that plan to the team

- When all members of the staff team have been informed and understand the procedure, the plan should be implemented.

An example of a dynamic risk assessment may be as follows. During a winter visit to a local farm the sudden onset of bad weather makes the road impassable for the coach. In this unexpected situation a dynamic Risk Assessment must be carried out with the new risks taken into consideration:

- How long could the coach be stuck for?
- How much fuel does the coach have to keep the children warm?
- If there are children who take prescription medication, have they got enough for the expected timeframe?
- Have all the children got enough warm clothes?
- Who should be contacted to help?

If after all factors have been considered, a judgement is made that it is safe to wait on the coach until help arrives, the emergency services can then be contacted. If not, it may be necessary to contact local support to help with transport to a local public building e.g. a Church Hall or library.

Charging and payment for visits

Any activity which is an essential part of the National Curriculum or takes place during school time must be provided free of charge. However, voluntary contributions may be sought, provided that where such contributions are not forthcoming the activity must be provided for all relevant pupils, or must be cancelled entirely. For activities which are additional to or an enhancement of the National Curriculum and which take place outside of school time, any charge will be made in accordance with the Governing Body's agreed policy on charging for school activities. All collection, banking and accounting for monies should be carried out according to LA procedures.

The cost of a preliminary visit by the party leader or another teacher may be regarded as a necessary element of the total cost of a visit (within the United Kingdom) and may therefore be recouped as part of any charge to those taking part.

School must not enter into any contractual arrangements before approval has been given. In particular, school should not pay non-returnable deposits or enter into definite commitments until specific approval for the visit has been given.

Travel

Travel should be organised through reputable agencies and travel companies. School should ensure that any insurance cover included within a package is adequate.

Insurance

The Governing Body at Walmley Infant School has public liability insurance which protects the school against claims for compensation made against them by third parties such as pupils, parents, and visitors who sustain a personal injury or loss of or damage to their property as a result of negligence on the part of the school. Examples of such claims would be a pupil injured as a result of poor or inadequate supervision, or a falling light fitting injuring a visitor to the premises.

The policy has been extended to cover all school organised activities and this includes approved educational visits.

Notification to the Council for overseas and adventurous activities

Birmingham uses a system of notification for all visits involving adventurous activities; all visits to 'wild country' and Duke of Edinburgh Award expeditions. These visits **must** be notified to the Council using the form OE2005. Visits abroad must be notified to the Council (Overseas Visits Form OSV 2005). These are overseas and adventurous activities delivered by an external provider or by staff within the establishment. It is important Coronavirus is factored into planning of any trip. For further guidance about planning visits during the coronavirus pandemic, including links to government advice for schools and other establishments, see OEAP National Guidance document Coronavirus https://oeapng.info/search-results/?download_search=covid+19 (accessed 2nd March, 2026).

Non-adventurous activities do not require notification e.g. visits to any museum, local parks, the theatre, theme parks such as Alton Towers. - Please contact the Education Visits Adviser if you are not sure.

Visits requiring notification to the Council should be submitted at least 4 weeks prior to the day of the visit wherever possible. However, in the case of complex visits such as expeditions abroad support should be sought.

Forms for Adventurous Activities and Overseas Visits should be submitted to

Email: schoolsafety@birmingham.gov.uk

Safety Services (WS)

P.O. Box 15630

Birmingham

B2 2QF

Tel. 0121 464 8564

Before the visit

Thorough preparation for a visit must be undertaken. The EVC and the Head Teacher should be consulted regarding the arrangements, nature and purpose of the visit. The visit should have clear educational aims. The following must be addressed in further planning:

- Matters of supervision, Provider checks, content of the day(s) activities, first aid and transport must be considered and organised in advance
- An Educational Visit Approval form must be completed after initial enquiries about a visit but before confirmation is made
- Additional risk assessments to be completed with regard to children with additional needs, i.e. behavioural needs, medical needs and physical/sensory needs
- Parents must be advised of the details of any visit and kept fully informed.
- All necessary permission/consent slips must be obtained. These should include if they require a lunch from school
- At least two weeks before, make kitchen staff aware of an upcoming visit so they can plan to prepare packed lunches for those who require them
- A pre- visit to where the visit is to take place is essential to ensure the Visit Leader has first-hand knowledge of where the visit is to take place and to ensure the risk assessment is accurate and relevant to the staff and children taking part on the visit
- Ensure enough staff/volunteers who are DBS checked are able to accompany the trip. If a parent whose child is going on the visit is helping and in charge of a group of children they may supervise a group in their own child's class, with their child as long as supervision is monitored by the class teacher.

On the day of the visit

In addition to measures documented on the Risk Assessment staff should:

- ensure that the coach driver has school contact details
- sign to say they will only use their own personal phones for emergencies. Any other adults accompanying you on the visit should be asked to put their phones on silent and not receive any calls during the trip unless an emergency arises.
- leave the list that staff will sign with their names and phone numbers on it so office staff can get in contact during the day if required
- leave a copy of coach and group lists with office staff
- carry a class list/register. This is to be called before starting a trip and departing from any visit. It should be called again on return to school once all the children are back in their classrooms. No children should be taken to after school clubs or to their parents before this has been done

- ensure adequate supervision and check that children are always given suitable briefings in their group with their group leader and staff to take regular head counts
- ensure that children are accompanied by a DBS checked adult at all times if any adult accompanying you on the trip does not hold a current DBS check they should be with another adult who does hold one at all times
- Contact school to inform them of safe arrival to the trip and departure from the trip with an estimated time of arrival.

After the visit

- A post-visit evaluation report should be completed, any accident/incident details recorded and the risk assessment reviewed appropriately
- All signed risk assessments, group/coach lists, accident forms, phone list and a copy of the visit itinerary and evaluation must be given to the EVC

Residential Visits

There may be occasions on which it is considered appropriate to offer residential visits to enhance learning. On these occasions:

- pupils will be made familiar with the environment or similar environments
- clear and understandable boundaries will be set for the group
- there must be clear lines of communication between the Centre Leader, the School Leader and the school
- school staff will be in the expedition or activity area and able to reach the group reasonably promptly should the group need support in an emergency
- there will be limited unstructured free time in a residential programme as this could allow time for mischief, bullying, homesickness and wandering off from the body of the group

Night Time

Group leaders should ensure that:

- the group's immediate accommodation is exclusively for the group's use.
- teachers (of both genders where appropriate) have sleeping accommodation on the same floor immediately adjacent to the pupils' accommodation
- there is a teacher present on that floor whenever the pupils are there.
- child protection arrangements are in place to protect both pupils and staff
- in the absence of 24 hour staffing of reception, external doors must be made secure against intrusion and windows closed as necessary to prevent intrusion

- where possible, internal doors are lockable but staff must have reasonable access to the pupil accommodation at all times
- all staff and pupils know the emergency procedures/escape routes in the event of a fire. Where windows and doors are locked against intrusion at night, ensure that alternative escape routes are known and that all fire doors function properly

Staff will have briefings each night to take stock and assess the circumstances for the next day, and to spend time early the next morning explaining arrangements to the pupils.

Behaviour issues, illness or injury

Educational visits can be a good opportunity for school staff to get to know pupils away from the confines of the school, but the group leader should resist any temptation to accept lower standards of behaviour. The different hazards that pupils may be exposed to away from the school will require them to observe standards of behaviour that are at least as high as, or higher than, in the classroom.

If one adult has to give prolonged attention to one group member, the group leader should reassess the supervisory roles of the other adults to ensure that all members of the group know who is responsible for them. Activities may need to be amended until the other adult returns all of his or her attention to the group.

Group leaders should trust their own knowledge of the young people and use their own professional judgement. This may include challenging an activity leader where the group leader's knowledge of the group is superior, or intervening to prompt a change of plan.

Emergency procedures during the visit

If an emergency occurs on a school visit the group leader will maintain control of the group overall. The procedures will be as follows:

- Establish the nature and extent of the emergency as quickly as possible
- Ensure that all the group are safe and looked after
- Establish the names of any casualties and get immediate medical attention
- Ensure that a teacher accompanies casualties to hospital with any relevant medical information, and that the rest of the group are adequately supervised at all times and kept together
- Notify the police if necessary
- Ensure that all group members who need to know are aware of the incident.

- Ensure that all group members are following the emergency procedures and the roles allocated to them -revise procedures and re-allocate roles as necessary
- Inform the school contact and provider/tour operator (as appropriate). The school contact number should be accessible at all times during the visit
- Details of the incident to pass on to the school should include: nature, date and time of incident; location of incident; names of casualties and details of their injuries; names of others involved so that parents can be reassured
- Action taken so far; action yet to be taken (and by whom)
- School contact should notify parents, providing as full a factual account of the incident as possible
- Notify insurers, especially if medical assistance is required (this may be done by the school contact)
- Ascertain phone numbers for future calls. Try not to rely solely on mobile phones
- Write down accurately and as soon as possible all relevant facts and witness details and preserve any vital evidence
- Keep a written account of all events, times and contacts after the incident
- Complete an accident report form as soon as possible. Contact School Support Manager (contact details attached), if appropriate. Copies of all sent documentation must be retained in school
- No-one in the group should speak to the media. Names of those involved in the incident should not be given to the media as this could cause distress to their families
- No-one in the group should discuss legal liability with other parties, nor sign anything relating to accident liability without clear advice from their LA
- Keep receipts for any expenses incurred -insurers will require these
- Safeguarding procedures should be followed in the same way as if the group was in school

Visits and the threat of terrorism

When planning any visit take into consideration the likelihood of the destination, venue or transport hubs being at risk from a terrorist attack.

It is sensible to:

- Be aware of the latest news relating to your destination
- In the UK know the current threat level
- When traveling abroad check the FCDO website ([Foreign, Commonwealth & Development Office - GOV.UK](#)) in the early stages of visit planning, at regular intervals and immediately prior to the visit

- Consider the threat of terrorism as part of a visit risk management and include it within emergency visit plans.

IN THE EVENT OF A CRITICAL INCIDENT (during school hours)

Deciding what to do in the event of an accident or emergency should form part of the planning and preparation of every off-site visit and be written down as Emergency Procedures for the visit - all members of the visit leadership team should be familiar with these.

Critical Incident cards must be carried by staff members attending the visit so that contact can be made as soon as possible.