



# Shirley Manor

Primary Academy

Working together to achieve excellence

## Educational Visits Policy

**Approved by:**  
LGB

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## **STATEMENT OF INTENT**

Shirley Manor Primary Academy understands that visits and trips can be effective ways of motivating pupils, and can often offer unique educational experiences. The school aims to ensure that pupils are engaged in their learning; educational visits afford pupils an opportunity to learn 'off site' in a more practical setting.

Our school takes the health and wellbeing of our staff and pupils very seriously. This policy has been designed in line with Bradford Council Educational Visits Policy, DfE and HSE guidance. It details our responsibilities for pupils and staff members during educational visits and school trips.

### **1. Legal framework**

This policy has been created with regard to relevant legislation including, but not limited to:

- The Health and Safety at Work etc. Act 1974

This policy has also been created with due regard to the following guidance:

- DfE (2018) 'Charging for school activities'
- DfE (2018) 'Health and safety on educational visits'
- HSE (2011) 'School trips and outdoor learning activities'
- DfE (2013) 'Driving school minibuses'

This policy should be used in conjunction with the following school policies:

- Complaints Procedures Policy
- Behaviour Policy
- Critical Incident Policy
- Health and Safety Policy
- Charging and Remissions Policy
- Equal Opportunities Policy
- DBS Policy

### **2. Definitions**

'In loco parentis' - the group leader of any school trip or educational visit has a duty of care over the pupils in place of a parent.

'School trip' - any educational visit, away-day or residential holiday organised by the school which takes pupils and staff members off-site.

'Residential' - any school trip which includes an overnight stay.

Activities of an 'adventurous nature' – examples could include but are not limited to the following:

- Trekking
- Caving
- Skiing
- Water sports
- Climbing or high ropes activities
- Abseiling

### **3. Key roles and responsibilities**

*The governing body is responsible for:*

- The overall implementation of this policy.
- Ensuring that this policy, as written, does not discriminate on any grounds including, but not limited to: ethnicity/national origin, culture, religion, gender, disability or sexual orientation.
- Handling complaints regarding this policy as outlined in the school's Complaints Procedures Policy.
- Ensuring educational trips and visits positively impact on pupils' lives, providing opportunities for new life skills and new experiences.
- Promoting sound safeguarding practices with the aim of protecting pupils participating in educational visits and trips.

*The Head of School is responsible for:*

- The day-to-day implementation and management of this policy.
- Appointing an educational visits coordinator.
- Liaising with the Educational Visits Coordinator/ Visit Leader(s) and ensuring that information regarding any planned trips to parents has been communicated to parents/carers.
- Liaising with the governing board regarding the organisation of educational visits and trips, including settling any disputes.
- Being part of the approval process for educational visits and trips.
- Ensuring the Educational Visits Coordinator is competent to oversee the coordination and planning of off-site education and arranging for regular training to be undertaken as necessary.
- Overseeing that relevant paperwork, including risk assessments, for educational visits and trips has been undertaken and completed.
- Reviewing risk assessments and visit planning to ensure suitable safety measures are in place prior to each visit or trip.
- Overseeing the work of the Educational Visits Coordinator and ensuring a consistent whole-school approach is adopted with regard to the planning and coordinating of educational visits and trips.
- Ensuring there are contingency plans in place in the event of a member of staff being absent on the day of the visit or trip.

*The Educational Visits Coordinator (EVC) has overall responsibility for:*

- Overseeing all issues and controls regarding educational visits and trips
- Liaising between all appropriate parties, including the local outdoor education adviser (EVOLVE) during the planning and organising of educational visits and trips and seeking additional advice as required
- Working with the local outdoor education adviser (EVOLVE) to help staff assess and manage risks.
- Ensuring the systems and procedures for dealing with educational visits adhere to the requirements of this policy
- Reviewing risk assessments prior to educational visits and trips to ensure pupil and staff safety
- Ensuring that the Visit Leader has compiled an itinerary prior to an educational visit or trip and has communicated this to participating staff to ensure the day is well organised and safe. In addition, the Educational Visits Coordinator will check that parents/carers have received a summary letter of the visit's purpose and activities planned
- Checking that an appropriate member(s) of staff has been selected to be the designated leader(s) of the trip
- Ensuring that any problems are raised in a meeting with the governing body

*The designated leader(s) in charge of the trip are considered to be 'in loco parentis' and have a duty of care to all pupils on the trip. They are also responsible for:*

- Checking the schedule is free on the school calendar prior to planning an educational visit
- Identifying the educational purpose of the educational visit or trip and presenting its benefits to the Head of School
- Completing all essential documentation for the trip, including risk assessments, staffing and itineraries and conveying these to the Head of School and EVC using EVOLVE, six weeks in advance of the trip (where possible)
- Informing parents of the proposed educational visit or trip, where possible, six weeks in advance of the trip
- Ensuring that the trip letter including payment details are in place on the school Parent Pay system (where possible) six weeks prior to the trip. They will be responsible for making parents/carers aware that in using the Parent Pay system to pay for the visit they are giving permission for their child (child in their care) to take part in the trip. The leader will ensure that admin staff issue payment/permission reminders where necessary
- Understanding and operating safeguarding measures throughout the planning, organisation and delivery of the educational visit or trip
- Delegating responsibilities to other staff members on the visit or trip
- Ensuring all adults on the trip are aware of their responsibilities and that the necessary checks have been carried out on any non-staff volunteers in line with the DBS Policy

*Staff are responsible for:*

- Adhering to this policy and applying its principles when participating in educational visits and trips.
- Ensuring the safety of the pupils is paramount throughout the educational visit or trip.
- Liaising with the designated leader to understand any personal responsibilities and ensuring they contribute to the smooth running of the educational visit or trip.
- Ensuring that any outdoor space visited, e.g. a park and playing field, is kept clean and free from litter during the trip. Pupils are responsible for:
- Following instructions from staff while on school trips.
- Understanding that they are representing the school whilst on an educational visit or trip and be aware of behaviour expectations and adhere to them.
- Ensuring that, during visits to outdoor spaces, they keep the area tidy and free from litter
- Behaving in a manner consistent with the ethos of the school, and following the behaviour expectations set out in the school's Behaviour Policy and Staff Handbook with regards to this policy

#### **4. Training of staff**

Staff will receive training on this policy as part of their induction. Staff will receive regular and ongoing training as part of their CPD.

## **5. Planning school trips**

Prior to planning an educational visit or trip, the following guidance will be read by the organisers:

- DfE (2018) 'Health and safety on educational visits'
- HSE (2011) 'School trips and outdoor learning activities'

A thorough risk assessment will be conducted by the visit leader(s) during the planning of the trip with the aim to ensure pupil and staff safety.

Adventurous activities will always be clearly identified at the planning stage and NEVER added during the trip on an ad hoc basis. When planning water sport activities, the need for trained instructors and lifeguards will be considered.

The school will do everything in its power to ensure that all pupils are included and afforded the opportunity to participate in school trips, for example, by organising two trips with a smaller group size or selecting a venue capable of catering for all pupils.

## **6. Risk assessment process**

Our risk assessment process is designed to manage risks when planning trips, while ensuring that learning opportunities are experienced to the fullest extent. The individual carrying out the risk assessment process will have the skills, status and competence needed for the role, understand the risks involved, and be familiar with the activity. The process, completed on the Bradford proforma, is as follows:

- Identify the hazards
- Decide who might be harmed and how
- Evaluate the risks and decide on precautions
- Record findings and implement them
- Review assessment and update if necessary

## **7. Vetting providers**

When considering external providers for activities, the Educational Visits Coordinator and EVOLVE will check whether they hold the 'Learning Outside the Classroom Quality Badge' to indicate they meet nationally recognised standards. If a provider does not hold the badge, the Educational Visits Coordinator will check (via EVOLVE) the following to ensure they are a suitable organisation to work with:

- Their insurance arrangements
- Their adherence to legal requirements
- Their control measures
- Their use of vehicles
- Staff competency levels
- Safeguarding policies
- The suitability of their accommodation
- Any sub-contracting arrangements in place
- The presence of necessary licences

If it is deemed appropriate to engage with an external provider, a written agreement will be created outlining what each party is responsible for.

If an organisation does not meet the school's standards, they will NOT be considered.

## **8. Equal opportunities**

Shirley Manor Primary Academy promotes values of equality and does not discriminate against any individual or group of pupils when organising a trip. The educational visits and trips offered to pupils will provide new experiences and develop life skills. Educational visits and trips are organised, managed and conducted in accordance with the school's Equality Diversity Inclusion Policy.

Due to the popularity of some educational visits and trips where numbers are restricted, the school offers some places on a first come, first served basis. Any individual, staff or otherwise, shown to be taking preference over one pupil or a group of pupils will be subject to formal disciplinary action. Where possible, pupils will be given the opportunity to contribute to the planning and organisation of educational visits and trips. It is recommended that pupils are made aware of the proposed activities appertaining to the visit. For school trips that require additional payment, the fee will be reasonable and help will be provided, where possible, for those pupils who cannot afford the initial fee.

## **9. Parental consent**

For all pupils, parental consent is gathered for any visit. By using Parent Pay it is made clear to parents/carers that in paying for the visit they are giving permission for their child to participate.

Further written consent is required for:

- Activities of an adventurous nature
- Any visit which is not considered to be in the local area / walking distance
- Residential trips
- Trips outside of school hours

Parents will be informed of activities by letter and will have the opportunity to withdraw their child from taking part.

## **10. Staffing ratios**

There is no law that lays down accepted staff: pupil ratios on educational visits; the responsibility for staffing rests with the Head of School / EVC.

Shirley Manor Primary Academy will examine each visit separately and ratios for each visit will be based on the risk assessment taking into account the nature of the visit and the pupils participating. At Shirley Manor Primary Academy we have agreed the following ratios for educational visits, however, the risk level for each trip is assessed on an individual basis and will be amended appropriately to reflect risk levels. Wherever possible the minimum ratios should be increased. Supervision is improved when more adults are available to carry it out. There will be sufficient staff to cope generally and in an emergency.

Our minimum staff to pupil ratios is as follows:

Early Years Foundation Stage – 1:4 (under 5) / 1:6

Key Stage 1 - 1:6

Lower Key Stage 2 -1:8

Upper Key Stage 2 – 1:10

## **11. Insurance and licensing**

When planning activities of an adventurous nature in the UK, the educational visits coordinator will check that the provider of the activity holds a current licence. Insurance will be organised for every trip, no matter how short, to ensure adequate protection and medical cover is in place.

## **12. Accidents and incidents**

In the case of accidents and injuries while on a school trip, the school's accident reporting process will be followed, as detailed in the Health and Safety Policy.

The Head of School will keep written records of any incidents, accidents and near misses.

Media enquiries will be referred to the Head of School or, if they are not available, the Assistant Headteachers.

Staff will use guidance as set out in the Critical Incident Policy, in particular the 'after a critical incident' section, to ensure the safety of pupils and staff should anything happen, e.g. a terrorist attack. Staff will be briefed on how to react and respond should an emergency situation occur, e.g. a terrorist attack. There will always be an emergency plan in place for adventurous visits and residentials. Relevant risk assessments will be undertaken before the trip, including for points of interests such as museums and hotels. Pupils and staff are informed of an evacuation plan before entering trip venues; this should include an agreed rendezvous point, to ensure everyone knows what to do in an emergency.

To ensure pupils are easily identifiable, they must wear school uniform, unless the risk assessment explains why this may not be necessary e.g. closed site with no other visitors.

## **13. Missing person procedure**

The school places pupil and staff safety as its top priority when participating in school trips, either domestically or abroad.

Before embarking on the trip, extensive risk assessments are undertaken in accordance with section six of this policy. The Educational Visits Coordinator will liaise with the Visit leader(s) to ensure that they have communicated with the visit venues to ensure the correct group sizes are planned for each setting. When travelling with a pupil with SEND (needing 1:1 support) the Educational Visits Coordinator will ensure that the Visit Leader(s) have made provision for an adult to be with the pupil at all times and that the visit is adequately modified to suit the pupil's needs in accordance with section 15 of this policy.

Everyone on the trip will be provided with a contact sheet for all members of staff, in the event they are unable to locate their group. All staff members will be required to carry mobile phones with them at all times. Upon arriving at every venue, the trip leader will identify a rendezvous point where pupils and adults should go if they become separated from the rest of the group. This will be communicated to the groups. Pupils and staff will wear Shirley Manor Primary Academy branded clothing, in accordance with section 12 of this policy, in order to make them easily identifiable. Regular head counts of all pupils and staff will take place throughout the day to ensure all persons are present at all times.

In the event someone goes missing whilst on a school trip:

- The trip leader will ensure the safety of the remaining pupils and staff by taking a register to identify who is missing.
- The trip leader will immediately identify at least one adult to start looking for the person and another adult to contact them via phone, these people will look for the person until, where necessary, the police arrive.
- Where possible, the venue will be notified of the missing person to help ensure the person is found quickly.



- If the person cannot be contacted or located within 10 minutes, the local police or relevant authorities will be contacted.
- If the police are called, the trip leader will contact the Head of School, or other available person, at the school and inform them of what has happened.

If the police, or another authority, is called to an incident where someone is missing, they will oversee locating the person and will advise on factors including, but not limited to, when to contact next of kin. If the missing person cannot be found, the group will return to school. If this is not possible, e.g. when a trip is taking place abroad, the Head of School/Educational Visits Coordinator and Shirley Manor Primary Academy Governing Body will make arrangements to ensure the group's safety, e.g. by changing venues or cancelling visits.

If a member of the party has gone missing and is subsequently found, the trip leader(s) will:

- Review the group sizes and staffing ratios to ensure no one becomes separated from their group.
- Review whether more registers should be conducted throughout the day.
- Assess which venues they attend to ensure they are suitable for the group.
- Make recommendations to the Head of School/ Governing Body/Educational Visits Coordinator to ensure similar incidents can be avoided in the future.

#### **14. Pupils with SEND**

Where possible, activities and visits will be adapted to enable pupils with SEND to take part. Where this is not possible, an alternative activity of equal educational value will be arranged for all pupils. Pupils with SEND will be accompanied by a responsible adult during the extracurricular trip or visit.

#### **15. Finance**

The financial procedures outlined in the Shirley Manor Primary Academy's Charging and Remissions Policy will always be followed when arranging trips. Shirley Manor Primary Academy will subsidise trips wherever possible and significant adjustments to payment will be made for children entitled to PP funding. Request for payment will be made where necessary with clarity being made that without sufficient contributions, the trip may not be able to go ahead. Where necessary the school will support staggered payment plans, giving parents the opportunity to break payments down over an extended period of time. Money for school trips will always be paid directly to the school. Under no circumstances should school trip money be processed through personal accounts.

All letters to parents regarding school trips will include a clause explaining what will happen in the event that the trip is cancelled or a pupil cancels their place on the trip. In the event that the trip is cancelled due to unforeseeable circumstances, it is at the Head of School's discretion as to whether a refund is given to parents. The Head of School will consult the governing body on the matter, taking into account the cost to the school, including alternative provision costs. In the event that a pupil cancels their place on a trip, it is at the Head of School's discretion as to whether a refund is given to parents. Where a pupil has previously cancelled a space on a school trip and received a full refund, the school has the right to refuse to allow the pupil to attend future trips and visits. The school will take a common-sense approach to refunds and cancellations, ensuring that all pupils are treated equally.

Any charge made in respect of pupils will not exceed the actual cost of providing the trip divided equally by the number of pupils participating. Once trip arrangements are booked and confirmed, if contributions to a trip exceed the total cost of the trip, a refund will be given where the excess is greater than £1 per pupil. Any excess of expenditure will be subsidised by the school fund at the discretion of the Head of School.

## **16. Evaluating trips and visits**

Following an educational trip/visit, the Educational Visit Coordinator will make contact with any staff members (pupils included) present on the trip to assess the success of the trip in respect of both educational value and safeguarding effectiveness. Based on this assessment, recommendations will be made to improve future trips and visits.

## **17. Monitoring and review**

The effectiveness of this policy will be monitored by the Head of School. The governing board will review this policy on a regular basis. The scheduled review date for this policy is September 2026.

## Appendices

### i. Visit Leader guidance



National  
Guidance

[oeapng.info](http://oeapng.info)

## Good Practice – the Basics

Good practice does not guarantee safety or success, but it does make them more likely. Good practice, in terms of **what** happens on any particular visit can be quite subjective, because it depends so much on the aims and the context. However, by looking at **how** outdoor learning and off-site visits are planned, managed and supervised, it is easier to identify what good practice looks like.

Good practice is fundamentally about getting the right leaders doing the right activities with the right participants in the right places at the right times.

The following are the basics of good practice.

### Enabling Policies and Systems

Have straightforward and practical employer and establishment policies, focused on enabling safe, high quality learning. Such policies should encourage all staff to engage with outdoor learning and off-site visits and include standard operating procedures to facilitate regular activities and visits happening as a matter of routine.

Ensure that effective systems are in place, with competent people in key roles, so that outdoor learning and off-site visits are managed effectively and without unnecessary red tape.

See the following OEAP National Guidance documents:

[1b "Foundations"](#)

[3.1a "Requirements and Recommendations for Employers"](#)

[3.1b "Establishment Roles and their Inter-Dependence"](#).

[5.3b "How to Write an Establishment Visit Policy"](#).

### Clear Aims

Identify clear aims and benefits: Answer the WHAT, WHO, WHY, WHERE and WHEN questions. Be clear about what you want to achieve, with whom and why. A clear understanding of aims makes it easy to identify suitable choices for many aspects of planning. Identifying the potential benefits is essential in making sound judgements as to whether the plan is sensible, acceptable and viable.

See the English Outdoor Council document ["High Quality Outdoor Learning"](#).

## Competent and Effective Leadership

Ensure the competence and effectiveness of visit/activity leaders and leadership teams, and that they have access to the training and advice that they need.

Appoint an Educational Visits Coordinator and make sure that they, and any others involved in the oversight and approval of activities and visits, have the training they need and access to competent advice.

See the following OEAP National Guidance documents:

[4.2e "Leadership and Management"](#)

[3.1 b "Establishment Roles and their Interdependence"](#)

[3.2 d "Approval of Leaders"](#).

## Thorough Planning

Take into account the six 'STAGER' variables (Staff, Timing, Activities, Group, Environment, Remoteness) and the interplay between them. Match the level of challenge to the capabilities of individual participants in order to maximise the benefits.

Plan systematically (e.g. by using a checklist) so that group and individual needs (e.g. safeguarding, special needs and disabilities, medication) are met and other relevant factors (e.g. parental information and consent, first aid, transport, insurance) have been considered. Many of these can be addressed through standard operating procedures.

Have contingency arrangements and alternatives (a 'Plan B') when

necessary. See the following OEAP National Guidance documents:

[1b "Foundations"](#)

[3.3 e "Checklist - Visit Leader"](#)

[4.1 a "Avoiding Accidents and Emergencies"](#).

## Proportionate Risk Management

Most human activity involves balancing benefits and risk. All activities have some risk associated with them, so the only way to eliminate **all** the risk is by stopping the activity altogether – but this means losing all of the benefits of the activity.

Risk management is not about eliminating risk altogether – it is about reducing it as low as reasonably practicable and deciding if this is acceptable so as to gain the benefits.

Risk assessment is a process, not a piece of paper, although it is important to record the key results of that process. Risk assessment and risk management are tools to enable participants to take part in beneficial activities safely, and not prevent such activities from taking place. Take a common-sense and proportionate approach and avoid unnecessary bureaucracy and paperwork.

See OEAP National Guidance document [4.3c "Risk Management - an Overview"](#).

## Effective Supervision

Make decisions about staffing ratios based upon your risk assessment. Employ active and effective supervision. Supervision is not a passive presence, it is an active employment of good leadership habits – supervision is about what leaders do, not just that they are there.

See the following OEAP National Guidance documents

[4.2 a “Group Management and Supervision”](#)

[4.3 b “Ratios and Effective Supervision”](#).

## Sound Selection and Use of Providers

Ensure that any external providers and facilities are carefully selected, and that there is clarity about the respective roles and responsibilities of provider staff and establishment staff at all times during a visit or activity.

See the following OEAP National Guidance documents:

[4.4 g “Selecting External Providers and Facilities”](#)

[4.4h “Using-External Providers”](#).

## Preparation for Emergencies

Ensure that emergency plans and procedures are in place and that they are tested and effective. Plans can never provide a step-by-step guide to responding to an emergency: they must be implemented and adapted by competent people.

See OEAP National Guidance document

[4.1 b “Emergencies and Critical Incidents – Overview”](#).

## Monitoring

Monitor what happens in your establishment(s), so that you know whether what happens in practice is consistent with policy and expectations.

See OEAP National Guidance document [3.2b “Monitoring”](#).

## Review and Evaluation

Review activities and visits in terms of aims, learning outcomes, planning, risk management, supervision arrangements, any incidents or accidents. Ask yourself: What worked well? What didn't work so well? What will we change next time?

What learning needs sharing with colleagues?

See the following OEAP National Guidance documents:

[4.2 c “Reviewing”](#)

[5.1 d “Evaluation”](#).



## ii. Risk Management Guidance



National  
Guidance

[oeapng.info](http://oeapng.info)

## Risk Management – What to Record and How

For an overview of risk management, and some practical advice on managing risks, see OEAP National Guidance documents [4.3c "Risk Management – an Overview"](#) and [4.3f "Risk Management – some practical advice"](#).

Employers are required by law to assess risks and, if they employ five or more people, record any significant findings. In the context of outdoor learning and off-site visits, this means identifying any significant risks and recording (as simply as possible) **what you plan to do** to reduce them to an acceptable level in the light of the benefits of the activity.

A risk assessment record should not normally be complicated or lengthy; it could be thought of as the minutes of a staff meeting involving the Visit Leader, where any significant issues, and how to manage them, were discussed and recorded.

There is no legal requirement to record a risk assessment in any particular format. It is **the quality of the recorded thought process** that matters, not **how** it is recorded. Establishments and leaders should use a format that is meaningful to them and demonstrates that all significant risks have been identified and taken into account during the planning of the visit. Employers should ensure that, if they require a particular format, it is helpful, easy to use and not overly bureaucratic.

When recording risk assessments for visits or activities, it is usually better to avoid using formulae or terms such as 'high, medium or low' to 'measure' the level of risk. Trying to apply such subjective 'measures' of risk to a group of participants, all of whom behave differently in different circumstances, may suggest an unreal level of certainty and cloud the practical issues that need to be managed. The final decision must be that the risk for each participant can be kept within acceptable levels.

The written record should be dated and indicate who completed it.

A check of the written record of the risk assessment should be part of the process of approving a visit or activity, where such approval is required.

When the written record is completed, that is not the end of the risk assessment process:

- Dynamic risk assessment should be used throughout the visit or activity – see OEAP National Guidance document [4.3c "Risk Management – an Overview"](#);
- The written record should be regularly reviewed – see the section on Reviewing Risk Assessment Records below.

## Levels of Documentation

Risk assessments may be recorded at two different levels: generic and visit-specific. Whether both are used, how, and in what combination, is the choice of an employer or establishment. What matters is that for any activity or visit:

- The documents, individually or in combination, record all the significant risks that have been identified and the plans to manage them, including those relevant to all the 'STAGER' variables (Staff, Timing, Activity, Group, Environment, Remoteness – see OEAP National Guidance document [1b "Foundations"](#)).
- All involved understand the plan as much as they need to, particularly their role and responsibilities within it and what they need to do.
- What is recorded happens in practice.

### Generic Documents

Generic documents can be used to cover the significant risks that you would usually expect to have to manage during a particular activity. They might include or refer to other documents such as:

- Employer or establishment policies;
- Safety rules provided by venues or external providers;
- OEAP National Guidance documents;
- Recommendations from National Governing Bodies etc.

Generic risk assessments are best when they form part of an establishment's policy and procedures. Examples include:

- Some establishments designate a 'local learning area', within which any routine visits may happen as a matter of course – in the same way as any on-site learning;
- Some establishments have standard procedures for specific activities and for such things as safeguarding, using transport, supervision of swimming pool changing rooms, and walking to local venues – see OEAP National Guidance document [8.1d "Example Standard Operating Procedures"](#);
- Prior to a visit to the seaside, you might decide to adopt the OEAP National Guidance documents [7.1o "Natural Water Bathing"](#) and [7.2i "Group Safety at Water Margins"](#) and ask leaders to read these and adhere to them;
- An instructor qualified to lead an adventurous activity could be required to work in accordance with guidance from the National Governing Body for their qualification – it is not usually necessary for such guidance to be repeated.

See also the section on Standard and Enhanced Planning and Management in OEAP National Guidance document [1b "Foundations"](#).

### Visit-Specific Documents

These should record the findings that are not covered by existing generic documents. For example, for a school visit to a farm, generic documents (such as the school's standard operating procedures and the relevant OEAP National Guidance documents) could be used to cover most of the normal risks associated

with travel to the farm and the activities at the farm, with a visit-specific document covering issues such as:

- Specific safety guidance provided by the farm;
- Specific hazards which were noted during a pre-visit to the farm;
- One of the leaders is inexperienced;
- One of the participants is known to exhibit challenging behaviour.

If existing generic documents cover everything, then there is no need for a visit-specific document, unless it is useful for reminding visit staff of the relevant generic documents. In the absence of generic documents, any significant findings should be included in the visit specific record.

The following are examples of formats that have been used effectively for visit-specific records – there are many other variations.

- Some electronic visit notification and approval systems include risk assessment recording as part of the process;
- A narrative (some leaders find writing ‘the story’ of their forthcoming visit a straightforward task but completing a risk assessment form daunting);
- Similar to the above, but in the form of a lesson plan with a timeline down the side and highlighting who needs to be informed about doing what and when;
- A two-column format listing significant risks (what might go wrong) and the appropriate control measures (what you will do about it) – extra columns can be used to record additional information if desired (see example 1 below);
- An ‘aide memoire’ format, where text boxes are used to record the significant risks and the steps taken to manage them – additional boxes can be used for reference notes or to identify key tasks and timings etc. (see example 2 below);
- Visit planning meeting minutes;
- Collated letters / briefing notes / information sheets / emails / audio or video recordings / annotated illustrations / maps.

#### Example 1. A simple two column format

The need for, and content of, any introductory information depends on how this form fits into a recording system or whether it stands alone.	
Health/safety issue	How to manage it
Completed by	
Date	

If useful, additional columns could be added to, for example, identify responsibilities for key actions, identify who needs to be informed of what, etc.



### Example 2. A simple 'aide memoire' format

The need for, and content of, any introductory information depends on how this form fits into a recording system or whether it stands alone.
Hazards / Risks
Plans to control the risks
Completed by
Date

If useful, additional rows or boxes could be used for notes or to identify key actions or as an *aide memoire* for key timings etc.

## Reviewing Risk Assessment Records

It is important to remember that risk assessment is a process. A document is a record of the conclusions of that process. Circumstances change, and a document can become outdated. It is therefore important to review recorded risk assessments, and a judgement must be made about when and how often to do that.

As with the initial risk assessment, a review of a recorded risk assessment should be carried out by a competent person.

A record should be made of when and by whom a review was undertaken, even if no changes were made as a result.

It is good practice to review every visit soon after its completion, and to use any lessons learned to inform and update relevant risk assessments.

### Visit-Specific Documents

It can be useful to use a visit-specific risk assessment record as the basis of the risk assessment for a similar visit in the future. This should be done with care, as circumstances may have changed since the previous visit. For example, the staff and/or participants may be different, there may have been changes at the venue, and the weather or ground conditions may be different.

The risk assessment record should be reviewed and, if necessary, updated both before and after each visit.

### Generic Documents

As with visit-specific risk assessments, generic records would ideally be reviewed both before and after every visit, but this is not usually practicable or necessary.

The following suggestions should inform your decision of when and how often to review them:

- When there has been any significant change to any of the STAGER variables that might affect the risk assessment (e.g., change of staff or external provider; different time of day or year; different activity or transport arrangements; different type of participant; unusual weather; change of venue);
- When there has been a change in relevant external guidance (e.g., from your employer; in OEAP National Guidance; from an activity's National Governing Body; from an equipment manufacturer);
- When there has been an incident or near miss, or any lesson learned from the review of a visit;
- When a particular type of visit or activity has not happened for a long time;
- At least once a year, unless there are good reasons that make this unnecessary;
- As required by your employer.

## Using Artificial Intelligence

It is possible to use artificial intelligence (AI) to write a risk assessment, and commercial AI-powered risk assessment generators exist. AI can also be used to scan generic documents (see above) and to summarise the content that is relevant to a particular situation or visit.

However, using AI for risk assessment has some potentially serious drawbacks:

- Generative AI can produce false or misleading content;
- A risk assessment for a visit requires knowledge of all the factors involved in the visit (i.e. the STAGER variables) – many of these are particular to your situation and the details of the planned visit, and unless the AI system has access to these, it cannot conduct a meaningful risk assessment;
- Risk assessment is a process, during which you come to understand in depth the risks inherent in the visit – it is unlikely that you can reach the same level of understanding by reading an assessment carried out by AI;
- Realisation of the existence of some hazards sometimes only occurs during the process of risk assessment – they may not have been known when the AI system was 'informed' about the visit;
- Risk assessment involves judgement and decision-making, weighing the risks of an activity against its benefits and deciding whether the risks are acceptable.

The use of AI therefore requires great care. It should be regarded as a tool rather than as a substitute for a human-led process. Any document produced by AI should be reviewed and revised using the same level of consideration and judgement as when conducting a risk assessment.

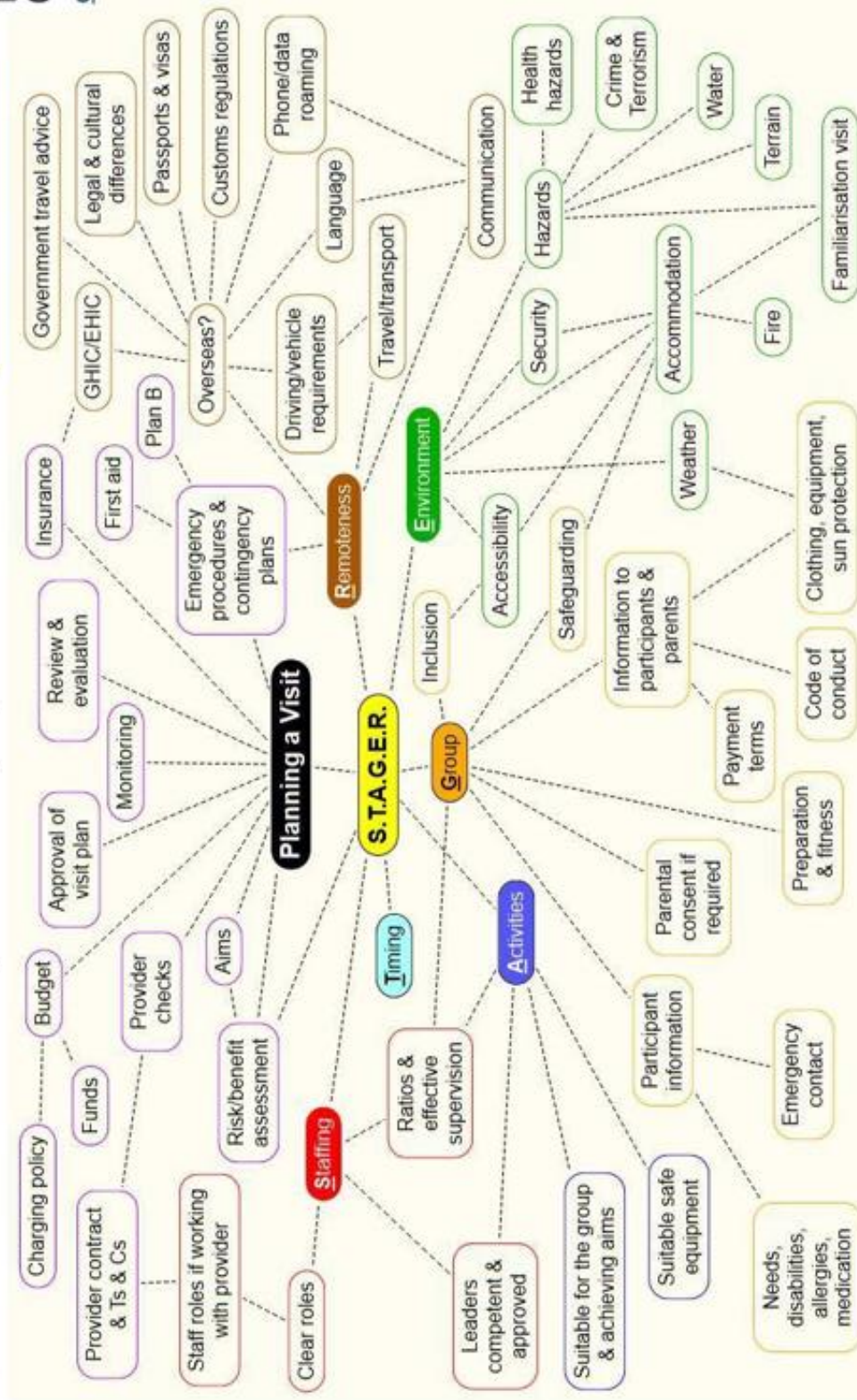
Similarly, if AI is used for other purposes, such as to scan recorded risk assessments to produce information for leaders, participants, parents or others, the results should be reviewed carefully before use.

## Visit Planning Mindmap

For links to guidance about the points, see National Guidance document 3.3e "[Checklist – Visit Planning](#)".



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## Visit Planning Flowchart

Is this a Standard visit or an Enhanced visit? See NG document [1b "Foundations"](#).

### Standard visit

Follow the establishment's standard operating procedures, making any necessary changes if there is anything non-standard about the group or the circumstances.

### Enhanced visit

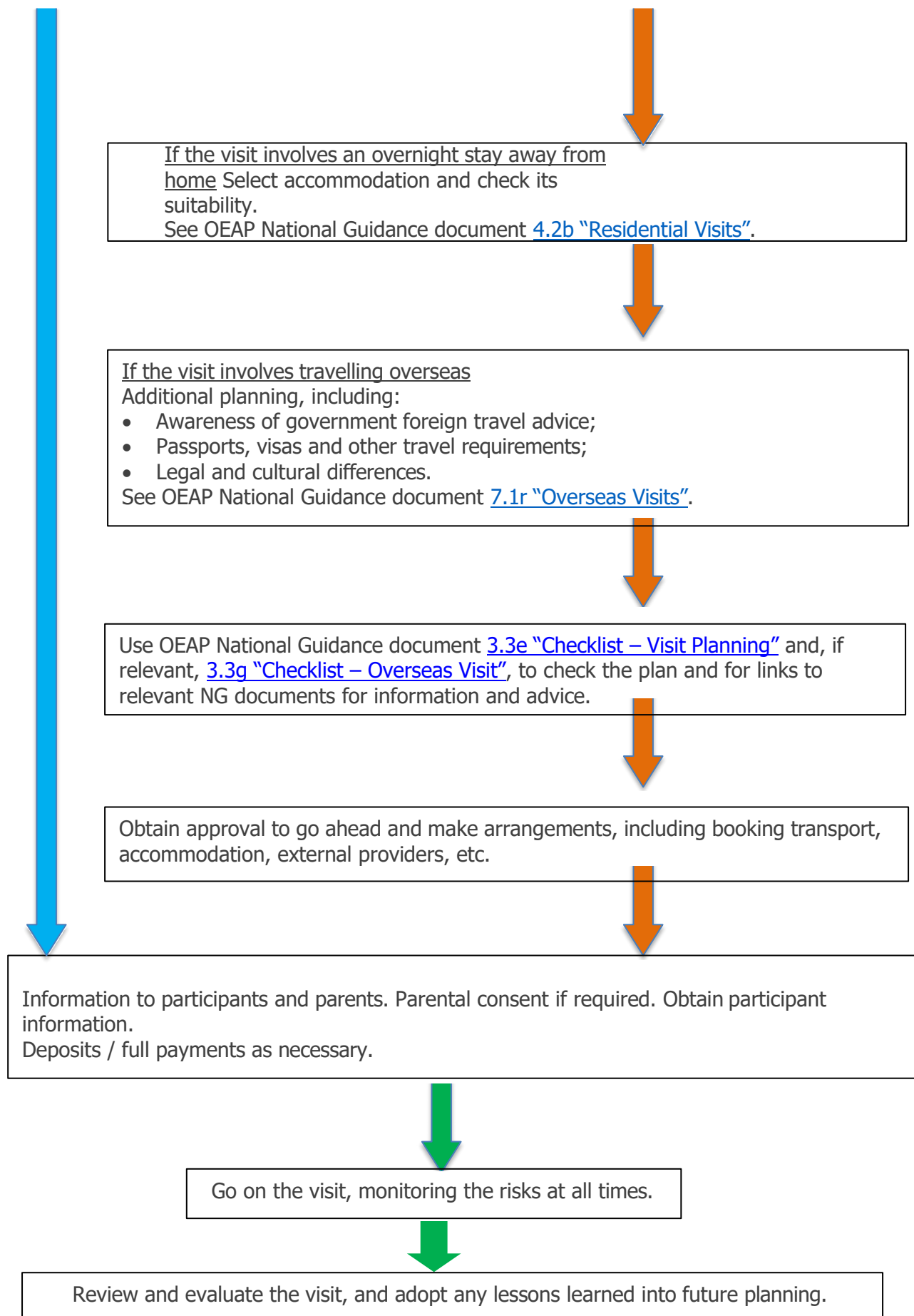
Outline Proposal, to be agreed in principle by head/manager if necessary. The proposal might include:

- WHO will be the participants;
- WHY the visit will take place – its aims;
- WHEN the visit will take place;
- WHERE the visit will go;
- WHAT activities will take place;
- WHO will staff the visit;
- Details of any external providers;
- Resources/funding needed.

### Detailed planning, following employer policies and procedures

This should consider the STAGER factors (Staffing, Timing, Activities, Group, Environment, Remoteness) and may include decisions about:

- Inclusion of participants with special needs or disabilities;
- Suitability of the venue, which might require an exploratory visit;
- Transport;
- Who will lead the visit, who will help supervise, and their competence;
- Suitability of any external providers, and their contract terms and conditions;
- The health, safety and safeguarding risks and how they will be managed;
- Insurance;
- First aid and emergency procedures;
- Costs, and who pays;
- Whether parental consent is needed.



#### iv. Planning Checklist



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### Checklist – Visit Planning

This list is designed to be a prompt for visit planning, and a final check. The relevance of each point, and the complexity of the responses, depends on the nature of the visit. Information about good practice can be found elsewhere in OEAP National Guidance (the numbers in brackets refer to some relevant documents).

For overseas visits, this checklist should be used in conjunction with OEAP National Guidance document [3.3q "Checklist – Overseas Visit"](#)

**Name of establishment** Shirley Manor Primary Academy

**Brief description of visit**

Click or tap here to enter text.

**Date(s) of visit** Click or tap here to enter text.

**Name of Visit Leader completing the checklist**

Click or tap here to enter text.

**Date**

Click or tap here to enter text.

#### General

- ☐ The intent of the visit is clear, integral to the establishment's curriculum/programme, and focuses on the learning and development of the participants ([4.3a](#)).
- ☐ The risks of all aspects of the visit have been considered and it is clear what leaders need to do to manage the risks ([4.3c](#)).
- ☐ There is access to first aid appropriate to the planned activities, the group, the environment and the remoteness of visit/activity locations. ([4.4b](#)).
- ☐ Suitable insurance is in place ([4.4c](#)).
- ☐ There are alternative options (a 'Plan B') as necessary ([4.1a](#)).
- ☐ There are emergency procedures for which leaders and emergency contacts have been prepared, and which are appropriate to the planned activities, the group, the environment and the remoteness of visit/activity locations ([4.1c](#), [4.1g](#)).



- ☐ The budget for the visit has been agreed and the Visit Leader has access to sufficient funds.
- ☐ If this is a visit organised by a school in school time, any charges meet legal requirements ([3.2c](#)).
- ☐ External providers and facilities meet expected standards ([4.4g](#)).
- ☐ Any contract with a provider is satisfactory and has been agreed by an authorised person in my establishment ([3.2i](#)).
- ☐ The visit meets the requirements of the employer and establishment.
- ☐ Evaluation and review arrangements have been agreed ([4.2c](#), [5.1d](#)).

### Staffing

- ☐ The Visit Leader is clearly identified and approved, and is aware of their responsibilities ([3.4k](#)).
- ☐ All leaders and helpers are clear about their roles, can fulfil them competently, and have been approved ([3.2d](#), [4.2a](#)).
- ☐ There are sufficient leaders and helpers to ensure effective supervision and deal with incidents and emergencies ([4.3b](#)).
- ☐ If the visit involves an external provider, there is clarity about the respective roles of provider staff and establishment staff ([4.4h](#)).
- ☐ Leaders and helpers have received all relevant information about the visit and the group, and are clear about any risks and their role in managing them.
- ☐ If accompanying leaders are taking a family member on the visit, there are arrangements to ensure that this will not compromise group management.
- ☐ The establishment's Educational Visits Coordinator (EVC) has been kept informed during the planning process.

### Timing

- ☐ The timing of the visit is appropriate ([1b](#)).

### Activities

- ☐ The programme of activities is designed to achieve the visit's intent, and is appropriate to the nature of the participants.
- ☐ The risks involved in specific activities have been considered ([7.1a to 7.1z](#)).
- ☐ The Visit Leadership Team includes leaders competent in the planned activities, or a suitable provider has been contracted to lead the activities.
- ☐ There is sufficient equipment available, which has been checked for suitability and safety.

**Group**

- ☐ Parents have been fully informed about the visit and have given their consent if this is required ([4.3d](#)).
- ☐ There are clear agreements with participants/parents about any requirements such as charges. If necessary, these are aligned with the terms and conditions of any contracts with providers ([3.2c](#), [3.2i](#)).
- ☐ Up to date contact details, medical and allergy information, dietary requirements and information about special needs are available and shared appropriately with the Visit Leadership Team and any provider ([4.4j](#), [6o](#)).
- ☐ If food is provided, it meets the requirements of 'Natasha's Law' ([6o](#)).
- ☐ Where appropriate, participants have been involved in planning, including identifying and deciding how to manage risks.
- ☐ Plans for the visit comply with current guidance about epidemics (such as coronavirus [4.4k](#)).
- ☐ Participants have been well informed about what is expected of them, and – if it is appropriate – have agreed to a code of conduct ([8.1i](#)).
- ☐ Participants are physically fit for the planned activities, and have received any necessary training.
- ☐ Participants have appropriate clothing, footwear and, if necessary, sun protection cream, sunhat and sunglasses (or these are provided as necessary).
- ☐ Participants are aware of the need to look after their own property, and adequate arrangements are in place for the security of property during the visit.
- ☐ The group will be managed and supervised appropriately ([4.2a](#)).
- ☐ Safeguarding issues are addressed ([4.3e](#)).
- ☐ Inclusion issues are addressed ([3.2e](#), [4.4i](#)).
- ☐ Medication issues are addressed ([4.4d](#)).
- ☐ Dietary issues are addressed.

**Environment**

- ☐ Environmental factors (e.g. weather, water levels, natural and man-made hazards) have been considered ([7.2i](#), [7.2j](#)).
- ☐ Accessibility issues are addressed ([4.4i](#)).
- ☐ The visit has been planned to minimise its impact on the environment and countryside ([4.4p](#), [7.1i](#)).
- ☐ The Visit Leader has undertaken a preliminary visit, or is already familiar with the venue and any provider, or has sufficient information from other sources ([4.4g](#)).
- ☐ Where remote supervision will be used, the environment is suitable ([4.2a](#)).



- ☐ Any accommodation is safe and suitable ([4.2b](#)).
- ☐ Security is addressed, especially for residential and overseas visits ([4.2b](#), [7.1r](#)).
- ☐ The risk of terrorism has been considered ([4.4e](#)).

**Remoteness**

- ☐ Travel/transport arrangements are appropriate ([4.5a](#)).
- ☐ Routine and emergency communication arrangements are appropriate to the location of the visit and all planned activities (e.g. if remote from a mobile signal).
- ☐ If the visit involves travel overseas, the checklist and guidance for overseas visits have been consulted ([3.3g](#), [7.1r](#)).

**Finally**

- ☐ My decision is that this visit is well prepared and should take place.
- ☐ The visit plan has been approved by the establishment's Head/Manager and by the employer if such approval is required.

**Notes**

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