



LAT Educational Visits Policy

Trust wide policy

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June 2026	1.0	New policy created
Sept	1.1	Updated policy following feedback from leaders

1. Introduction, Scope and Purpose

1.1 Introduction

Leigh Academies Trust values educational visits as a core part of a rich curriculum and a way of building cultural capital. We support visits because they strengthen learning, character, and personal development. They also help build positive relationships between pupils and staff and contribute to a strong academy culture.

Academies will take all reasonable steps to meet statutory requirements and current guidance when planning and delivering visits. This includes following recognised codes of practice and health and safety expectations for off-site activity.

Every academy will receive support, training and advice to plan and run high-quality visits. The Trust expects staff to take reasonable care for their own safety, that of others and the safety of pupils, and to work within this policy to keep everyone safe.

1.2 Policy aims

This policy sets out how academies plan, approve and manage educational visits. It explains LAT's expectations for risk assessment and outlines the roles and responsibilities involved in running safe and effective visits.

This policy aims to

- set out the Trust's planning and approval process for all visits
- describe the approach to risk assessment for every type of visit
- define responsibilities for staff, leaders and those involved in visit management.

1.3 Policy scope

The policy applies to all LAT academies and **all educational visits and trips that take place beyond the academy site**. It does not apply to

- work experience
- local routine sporting fixtures and on-site PE activities
- activities taking place within an academy boundary, which fall under the usual site policies.
- Activities taking place at another Leigh Academies Trust school.

Risk assessment for travel to fixtures must follow transport and minibus procedures. Any non-fixture visit run by a PE department or a Trust wide sporting event should be treated as a standard educational visit and must follow this policy.

This policy is informed by the Department for Education guidance, *Health and Safety on Educational Visits 2018*, and Outdoor Education Adviser Panel (OEAP) National Guidance. LAT will review the policy annually and after any changes in law or sector guidance.

1.4 Educational visit objectives

Every visit must have clear aims and curriculum links. These should support the academy's curriculum intent and be recorded in EVOLVE, the Trust's system for planning and approving visits. The Visit Leader must set out the purpose of the visit and how it contributes to learning.

2 Roles and responsibilities

This section sets out the detailed responsibilities of all parties involved in the planning, approval and delivery of educational visits across Leigh Academies Trust.

2.1 The CEO and Trust Board

- The CEO and Trust Board hold overall responsibility for health and safety under the Health and Safety at Work etc. Act 1974.
- They provide and review the LAT Educational Visits Policy and ensure it remains current and fit for purpose.
- They establish the procedures for planning, managing and approving educational visits and expect consistent application across all academies.
- They confirm that staff are trained, guided and supported so they can plan and lead safe educational visits that comply with this policy and national guidance.
- They confirm that academies are resourced to meet the requirements of this policy, including access to EVOLVE and appropriate administration support.
- They determine the Charging and Remissions Policy and confirm that academies follow appropriate financial procedures.
- They monitor compliance across the Trust and expect academies to correct any weaknesses identified in audits or monitoring reports.

2.2 The Central Services Executive Team

- The Central Services Executive Team, led by the Deputy CEO (Operations) provides operational support, quality assurance and compliance oversight to academies across the Trust on matters including educational visits.
- It confirms that staff training, development and ongoing support for Visit Leaders and Educational Visits Coordinators (EVCs) are in place.
- It confirms a clear approvals process exists for all visit categories, including default, overnight, adventurous and overseas.
- It oversees the monitoring arrangements for educational visits, including EVOLVE usage, compliance tracking, and reporting.
- It reviews visit activity, identifies patterns of concern and works with academy leaders to address these promptly.
- It holds academies to account for compliance with the policy and highlights persistent non-compliance to the CEO and Academies Directors where required.

2.3 The Principal

- The Principal has responsibility for implementing visit procedures within their academy and for ensuring that all staff follow this policy.
- The Principal appoints a competent EVC and confirms they have the training, authority and time to undertake the role.
- The Principal confirms that visit planning is completed in line with Trust procedures and that visit reviews are incorporated into academy quality assurance.
- The Principal confirms that appropriate insurance cover is in place for all visits and checks any additional insurance needed for specialist activities.
- The Principal escalates concerns to the Deputy CEO or CEO early, particularly where risk, compliance or staffing issues may affect a visit.
- The Principal confirms that planning processes consider value for money and cost transparency for parents.
- The Principal personally approves all overnight, adventurous and overseas visits submitted through EVOLVE.
- The Principal ensures emergency procedures are in place, including arrangements for contacting parents in the event of a serious incident.
- The Principal ensures the academy has a functional critical incident plan for visits and that senior staff understand their responsibilities and considers the LAT Emergency Response Plan.
- The Principal confirms that safeguarding requirements are in place for all visits and that staff understand their responsibilities in line with the LAT Safeguarding Policy.
- The Principal seeks further advice from Trust leaders or external specialists where appropriate for complex or high risk visits.

2.4 Educational Visits Coordinator (EVC)

- The EVC must hold the relevant up-to-date training certificates appropriate to the role
- The EVC confirms that proposed visits comply with LAT policy, Trust procedures and the academy's own processes.
- The EVC uses the EVOLVE system to review visit submissions, check documentation and verify whether planning aligns with the policy requirements.
- The EVC advises the Principal about any issues that may prevent a visit from being approved, including gaps in planning, risk assessment or staffing.
- The EVC approves all compliant default visits and gives initial approval for overnight, adventurous and overseas visits before passing them to the Principal for final sign off.
- The EVC assesses the competence of Visit Leaders and accompanying staff. This includes reviewing qualifications, experience and confidence in leading specific types of activity.
- The EVC confirms DBS requirements and reviews volunteer suitability.
- The EVC must check with People Services that all staff and volunteers involved in the Trip have DBS checks and request checks for volunteers where a DBS is not in place prior to the visit.
- The EVC confirms that emergency arrangements are in place for each visit, including named emergency contacts and contingency measures.
- The EVC maintains accurate records of all visits, incidents, near misses and evaluations and stores them in line with LAT data retention requirements.
- The EVC monitors academy use of EVOLVE, identifies issues, supports Visit Leaders and escalates non-compliance to the Principal.

- Each academy must designate a named Deputy EVC to act in the absence or incapacity of the EVC. The Deputy EVC must hold the appropriate training and must be clearly identified in the academy's visit management arrangements. This is particularly important for overnight and overseas visits, where a serious incident may require immediate EVC-level decision-making if the EVC is unavailable.
- The EVC confirms pre visits for higher risk activities wherever practicable and reviews the impact of these on planning.

2.5 Visit Leaders

- Every visit must have a designated Visit Leader who is competent, confident and directly employed or contracted by the academy.
- The Visit Leader plans the visit in full, including the purpose, activities, supervision, transport, staffing, medical.allergen needs and risk assessments.
- The Visit Leader completes all information on EVOLVE accurately and submits it within the required approval timelines set by LAT.
- The Visit Leader works closely with the EVC and follows their guidance throughout planning and delivery. The EVC will organise pre visit meetings for staff and volunteers to ensure they are aware of the detailed visit plan and emergency procedures
- The Visit Leader supervises the visit in line with agreed control measures and confirms that all accompanying staff understand their roles.
- The Visit Leader prepares contingency and emergency plans suitable for the visit type.
- The Visit Leader carries out dynamic risk assessments during the visit in response to changing circumstances.
- The Visit Leader records significant changes or issues and evaluates the visit to support future planning.
- The Visit Leader manages communication with parents in the lead up to the visit, working with academy office staff where needed.
- The Visit Leader reports any accidents, incidents or near misses to the EVC and H&S Compliance Team immediately to ensure that appropriate action is taken.
- The Visit Leader must ensure that a suitably trained staff member is assigned responsibility for any pupil with a known allergy who is prescribed an AAI, and that they are fully prepared to handle an emergency response.

2.6 Other staff on the trip

This section applies to all staff accompanying a visit who are not acting as the Visit Leader or EVC, including teaching staff, support staff and any other employees supporting delivery.

- All staff must follow the LAT Code of Conduct and Safeguarding Policy at all times.
- All staff must read and understand the visit plan, risk assessment and their specific role before departure.
- All staff must attend pre-visit briefings and raise any concerns in advance of the visit.
- All staff must act under the direction of the Visit Leader and must not make independent decisions that affect supervision, safety or the planned itinerary.
- All staff share responsibility for the safety, welfare and behaviour of pupils and must actively supervise pupils at all times in line with agreed ratios and control measures.
- All staff must carry out dynamic risk assessment during the visit and report any concerns, hazards or incidents immediately to the Visit Leader.
- All staff must maintain clear professional boundaries with pupils and follow safeguarding expectations, including avoiding situations where they are alone with a pupil

- All staff must follow agreed procedures for medical needs, first aid and emergency response, and must only administer first aid if trained and authorised to do so.
- All staff must support behaviour management in line with Trust and academy expectations and reinforce instructions given by the Visit Leader.
- All staff must handle personal data securely and follow LAT data protection requirements when carrying or accessing pupil information.
- All staff must report any safeguarding concern, incident, accident or near miss immediately to the Visit Leader to enable appropriate escalation and recording.
- All staff must model professional conduct throughout the visit, including appropriate use of language, dress and interactions with pupils and the public.

2.7 Volunteers

- Volunteers must be DBS checked where reasonably practicable and must always be DBS checked for overnight visits.
- Where a DBS check is not practicable, a volunteer risk assessment must be completed and approved by the Principal.
- Volunteers must understand the aims of the visit and read or be briefed on the risk assessment and supervision arrangements.
- Volunteers must attend meetings and be clear about expectations, boundaries and procedures.
- Volunteers must follow staff instructions at all times and support the supervision and discipline arrangements in place.
- Volunteers must not under any circumstances take photos of children on their own mobile device.
- Volunteers must not be left in sole charge of pupils under any circumstances.
- Volunteers must raise any concerns about the safety or wellbeing of pupils with staff immediately.
- Volunteers must avoid situations that place them alone with pupils or remote from staff oversight.

3 Procedural & Approval Requirements

3.1 Visit categories

All educational visits beyond the academy site fall into one of four categories. These categories determine the level of planning, risk assessment and approval required.

The visit categories are:

- **Default visit**, which takes place in the UK, does not involve adventurous activity and does not involve an overnight stay.
- **Overnight visit**, which takes place in the UK and includes one or more nights away.
- **Adventurous visit**, which includes an adventurous activity within the UK, regardless of whether an overnight stay is involved.
- **Overseas visit**, which takes place outside the UK, whether or not it includes an overnight stay or adventurous activity.

All visits must be recorded and approved through EVOLVE. The Visit Leader must follow all policy requirements and complete full planning for every visit regardless of category.

- **Default visits** and **overnight visits** may be approved by the Principal once all documentation is complete and compliant.
- **Adventurous visits** and **Overseas visits** must be approved by the Principal once they have consulted the H&S Compliance Team at compliance@latrust.org.uk.
 - Initial review: the Compliance Managers review the location, travel and activity details against the risk assessment. The risk assessment must be submitted with the request.
 - Approval process: once due diligence is complete, the Compliance Managers either notify the Deputy Director for Compliance of their approval and confirm this with the Principal, or ask the Deputy Director for Compliance to carry out a further review before a final decision is made. Confirmation is sent via the email thread.

Where more than one academy is involved, the lead academy must coordinate joint planning. One EVOLVE record is normally sufficient, though separate submissions are permitted if preferred.

3.2 Educational Visit Checklist

- Every visit must follow the LAT Educational Visit Checklist (see appendix 1) in full.
- The Visit Leader must complete the checklist during planning and upload it to EVOLVE to evidence compliance.
- The checklist supports the Visit Leader in confirming staffing, supervision, transport, venue suitability, medical needs and risk management.
- The checklist forms part of the required audit trail and must remain attached to the visit record.

3.3 Approvals process

- All visits must follow the EVOLVE based approval structure. Visit Leaders must not advertise a visit or collect money before the visit has received formal approval on EVOLVE.
- The EVC must check all visit documents, including risk assessments, staffing plans and communications, before approving or escalating for Principal approval.
- Principals must only approve visits once planning is complete, the risk assessment is suitable and sufficient, and all required documentation has been provided.
- Approval must be evidenced on EVOLVE before the visit may depart.

3.4 Approval timelines

Visit Leaders must submit visits in accordance with the minimum lead times set out below:

- Default trips not involving overnight or adventurous visits **minimum 2 academic weeks before departure**
- Default trips with overnight and adventurous visits: **minimum 6 academic weeks** before departure.
- Overseas visits: **minimum 10 academic weeks** before departure, or earlier depending on complexity.
- These timelines enable full review, amendments, venue checks, scrutiny of risk assessments and communication with families.
- Visit Leaders who repeatedly submit visits late may require follow-up by academy leaders.
- Overseas visits may need significantly longer planning periods. EVCs must agree on appropriate timelines with Visit Leaders from the beginning of planning.

3.5 Visit emergency pack

- The Visit Leader and the deputy leader must each carry an emergency pack.
- The emergency pack must include essential pupil contact information, medical details, staff contact details and any individual risk assessments. It is advisable that a paper copy is taken in case of any issues.
- A copy of the same information must be held at the academy with the designated on call senior leader.
- Sensitive data must be stored securely during the visit, and any loss or breach must be reported immediately in line with LAT data protection requirements.

3.6 Duty of care

- Staff have a continuous duty of care for pupils throughout the entire visit.
- This duty cannot be delegated to external providers, even during provider led activities.
- The Visit Leader must confirm that all staff and volunteers understand their supervision responsibilities and that pupils understand behavioural expectations.
- Duty rosters must be created for residential visits to ensure staff receive appropriate rest.

3.7 Supervision ratios

- Supervision ratios must be determined through the risk assessment and must meet or exceed LAT minimum ratios.
- Ratios must take account of pupil age, maturity, behaviour, SEND needs, the environment, activity type and the duration of travel.
- National Governing Body ratios must be followed where an adventurous activity is regulated by a recognised body.
- Overnight and overseas visits must include at least two adults, and normally adults of more than one gender unless specific circumstances prevent this.
- The Principal may approve amended ratios where justified by the risk assessment, but this decision must be recorded.
- Pre-visits for local trips are strongly encouraged for all higher risk activities. If a pre-visit cannot be completed, the Principal must be satisfied that the Visit Leader has obtained sufficient information to manage risks appropriately.

3.8 Using external providers

- External providers must be carefully assessed and selected.
- Providers holding nationally recognised accreditation, such as the LOTC Quality Badge or Adventuremark, should be given priority.
- Where accreditation is not held, the Visit Leader must request a completed provider statement and upload it to EVOLVE.
- Provider statements do not need to be completed for public access venues unless activities take place in restricted areas or involve enhanced risk.
- The Visit Leader must still write their own risk assessment covering risks to the group.

3.9 Transport providers

- When coaches or other transport are booked, a transport checklist must be completed by the company unless they have done so for another LAT academy within the last 12 months.

- The EVC must review the completed checklist and upload it to EVOLVE.
- The use of personal vehicles by staff to transport pupils on visits is not permitted.
- Sixth form students who hold a driving licence must not drive other students to or from a visit venue. A sixth form student may travel independently to a venue in their own vehicle, but only with prior written parental consent and with the approval of the Trip Leader. They must not carry other students as passengers in doing so.
- Staff must complete basic visual checks of transport on the day of travel.

3.10 Parental consent

- Parents must be informed of all educational visits in advance, regardless of when they take place.
- Written parental consent is not required for routine, low risk visits that take place within the normal academy day and form part of the curriculum, where appropriate consent arrangements are already in place.
- Written consent must be obtained for:
 - visits that take place outside normal academy hours
 - residential visits
 - overseas visits
 - adventurous or higher risk activities
 - visits involving nursery-age pupils
- Academies may use an annual or enrolment based consent process to cover routine visits, provided this is clearly communicated to parents.
- Verbal consent may be accepted in urgent circumstances but must be recorded on EVOLVE.
- Pupils without appropriate consent must remain on site and be provided with suitable supervised activities.

3.11 Consent for medical treatment

- Parental consent for emergency medical treatment must be obtained for all relevant visits, including overseas visits.
- Where consent is refused, the EVC and Principal must assess whether the pupil can safely participate and seek advice where needed.

3.12 First aid

- First aid requirements must be assessed at the planning stage and it is the expectation that a First Aider will be present on every trip.
- Higher risk, remote or early years visits require staff with appropriate first aid qualifications.
- A fully stocked first aid kit must be carried on all visits which has been checked by the EVC/trip leader prior to departure (items out of date or missing from pack)
- **Allergies:** Trip leaders must conduct risk assessments for pupils at risk of anaphylaxis on off-premises trips. Affected pupils must carry their adrenaline devices and asthma pumps, and be accompanied by staff trained to administer adrenaline (if the pupil is unable). Leaders may consider taking "spare" adrenaline devices for emergencies, provided it does not deplete the academy's on-site supply.
- **Medication:** Requirements for the custody, transport, storage and administration of pupil medication on visits, including controlled drugs, are set out in Appendix 2.

3.13 Safeguarding

- All safeguarding arrangements must follow the LAT Safeguarding Policy.
- Staff must maintain professional boundaries at all times, especially during residential visits.
- Any safeguarding disclosure or concern must be reported immediately to the academy DSL or to the on call arrangements when out of hours.
- All overnight and overseas visits must have a member of staff with delegated safeguarding responsibility for the duration of the trip. Wherever possible, this should be a trained Deputy Designated Safeguarding Lead (DDSL).
- Where it is not reasonably practicable to include a DDSL, the Principal must be satisfied that an appropriate member of staff has received enhanced safeguarding training specific to off-site visits and is competent to manage safeguarding matters. In these cases, clear arrangements must be in place for immediate access to a DSL or DDSL, including a direct contact route and escalation protocol
- Staff must not leave pupils solely in the care of provider staff unless needed in an emergency or as part of an agreed arrangement.
- Safeguarding processes must be considered when allocating rooms, planning supervision and selecting venues.

3.14 Supervision Ratios

Supervision ratios must be determined through a risk assessment and must reflect the age, needs of pupils, nature of the activity, environment and level of supervision required.

The ratios set out below are indicative benchmarks only and must not be treated as fixed requirements. Lower-risk visits, particularly those that are local, familiar and well-controlled, may operate safely at higher ratios where this is justified by the risk assessment and approved by the EVC. For higher-risk, unfamiliar or complex visits, lower ratios may be required.

The Visit Leader must record and justify the chosen ratio, and the EVC must confirm that it is appropriate before approval.

The following indicative ratios reflect practice used across large multi academy trusts and local authorities. They provide a benchmark for safe planning although higher ratios may be required in some circumstances.

Primary phase

- Nursery, Reception and Year 1 visits often require a ratio in the region of 1 to 5 due to age, supervision needs and the likelihood of increased individual support.
- Year 2 and Year 3 visits typically require a ratio in the region of 1 to 6.
- Year 4 to Year 6 visits usually require a minimum of 1 to 10 for low risk activities, increasing to 1 to 8 where the activity or environment is more demanding.

Secondary phase

- For low risk curriculum visits within the UK a ratio of around 1 to 15 is normally acceptable for Key Stage 3 and Key Stage 4 pupils.
- Where activities involve crowded locations, complex transport arrangements or extended travel, Visit Leaders may need to apply ratios closer to 1 to 10.
- For Sixth Form pupils, ratios may be wider where the risk assessment supports this, although LAT expects a minimum of 1 to 15 for most visits.

Specialist, complex or higher risk visits

- Ratios for pupils with SEND must reflect individual needs and any adjustments required for safe participation. Some pupils may require one to one supervision.
- Adventurous activities led by external instructors must follow the instructor to pupil ratios set by the relevant National Governing Body. LAT staff accompanying the group must still meet minimum expectations set out in this section.
- For residential visits a minimum of two adults is required at all times. The Principal may require a higher number depending on the group size, gender mix or needs of the pupils.
- Visits involving water based activities, coastal environments, transport hubs, large cities or unfamiliar international settings may require tighter supervision ratios. The EVC must review these ratios before approval.

Gender mix and safeguarding

Overnight and overseas visits should normally include staff of more than one gender unless specific circumstances prevent this. Where this is not possible the Principal must confirm that safeguarding arrangements remain robust.

Adjusting ratios

- Ratio decisions must be recorded in the risk assessment and approved by the EVC.
- The Principal may approve ratios outside the indicative values only where a detailed risk assessment supports the decision and records how pupil safety will be maintained.
- Ratios must be reviewed again immediately before departure if the group changes or if new information arises about pupils or planned activities.

4 Risk management and risk benefit analysis

4.1 Approach to risk management

- LAT supports the principle of balancing risk with educational benefit. The aim is not to eliminate risk but to reduce it to an acceptable level while enabling purposeful and engaging learning experiences.
- Risk management must be proportionate to the visit type. Higher risk activities require more detailed assessment, supervision and planning.
- The Visit Leader must consider both the benefits of the activity and the reasonably foreseeable risks before deciding whether it is suitable.
- If the Visit Leader is unsure about any element of risk management, they must seek guidance from the EVC. If the EVC requires further input, the Principal must be consulted.
- Any visit that cannot be made safe through appropriate control measures must not proceed.

4.2 Risk assessments

- Every visit must have a written risk assessment that is suitable and sufficient for the activities planned.
- The Visit Leader is responsible for producing the risk assessment. They may use LAT templates as a starting point but must adapt them to reflect the specific circumstances of their visit.
- Risk assessments must consider the activity, the group, the environment, weather, transport, supervision arrangements and any individual pupil needs.

- Generic risk assessments may be used only if they are meaningfully adapted to the particular visit. The Visit Leader must demonstrate their understanding of the environment and activity by adding visit specific details.
- Completed risk assessments must be uploaded to EVOLVE and reviewed by the EVC before approval is granted.
- The Principal must be satisfied that the risk assessment is comprehensive before approving overnight, adventurous or overseas visits.
- Visit Leaders must brief all staff and volunteers on the risk assessment before departure.

4.3 Risk assessing pupils with SEND, disability or medical needs

- LAT expects all reasonable adjustments to be made so that pupils with SEND, disabilities or medical needs can participate in visits.
- Visit Leaders must assess the specific needs of pupils and reflect these in the risk assessment. This may include adaptations to staffing, equipment, environment, access or supervision.
- The EVC and SENCO must be consulted when planning for pupils with additional needs.
- Additional considerations may include:
 - specialist equipment required for participation
 - additional staff to support specific pupils
 - medical conditions requiring specific treatment or supervision
 - mobility needs affecting transport, venue access or emergency evacuation
 - Personal Emergency Evacuation Plans (PEEPs) where relevant.
- Pupils should only be excluded from visits in exceptional circumstances where all reasonable adjustments have been considered and participation cannot be made safe.
- For pupils with known allergies, the Visit Leader must check food provision, packed lunches, shared snacks, transport arrangements and venue catering to reduce the risk of exposure. Staff must know how to recognise an allergic reaction and how to use any prescribed medication, including auto injectors. Clear plans must be in place for safe storage, quick access and prompt use of medication, and all staff must know the emergency procedure.
- Medication requirements for visits, including controlled drugs, residential visits and international travel, are set out in Appendix 2.

4.4 Dynamic risk assessment

- Visit Leaders and accompanying staff must carry out dynamic risk assessments throughout the visit.
- Dynamic assessment involves responding to changing circumstances, including weather conditions, staff illness, behaviour issues, venue changes or unexpected hazards.
- Staff must modify or stop an activity where risks become unacceptable.
- Significant changes or decisions made during a visit must be recorded as part of the evaluation and stored on EVOLVE for future reference.

4.5 Involving pupils in risk awareness

- LAT encourages pupils to be active participants in managing risk where appropriate.
- When pupils understand the risks and control measures, they are more likely to behave safely and responsibly.

- Visit Leaders should, where appropriate, explain hazards and expectations to pupils and check their understanding before activities begin.
- Developing pupils' ability to manage risk is part of building independence and resilience.

4.6 Public health, seasonal and localised risks

- Visit Leaders must consider relevant public health risks, including any current government guidance affecting travel or group activities.
- Visit planning must take account of seasonal risks such as heat, cold, extreme weather, pollen, water conditions, insect prevalence or local health outbreaks.
- Visit Leaders must check national guidance for both the UK and destination country for overseas visits.
- Risk assessments must include contingency arrangements to manage cancellations, staff illness or altered travel restrictions.
- The EVC must verify that Visit Leaders have considered all relevant public health guidance during the planning process.
- Visit staff must remain flexible and prepared to adapt or cancel activities where public health conditions change.

5 Inclusion

5.1 Principles of inclusion

- Leigh Academies Trust is committed to offering all pupils the opportunity to participate in educational visits wherever it is reasonable and safe to do so.
- Visit Leaders must plan visits so that pupils with additional needs, disabilities or protected characteristics are not disadvantaged or excluded.
- The Equality Act 2010 requires academies to make reasonable adjustments to support participation for pupils with disabilities. These adjustments must be built into the planning process from the outset.
- Consideration of inclusion must form part of the early stages of visit planning to allow sufficient time to put any necessary arrangements in place.

5.2 Planning for pupils with SEND, disability or medical needs

- Visit Leaders must identify pupils who may require additional support and consult with the SENCO, EVC and parents where appropriate.
- Risk assessments must reflect the specific needs of pupils and describe measures required for safe participation.
- Adjustments may include altered supervision ratios, adapted transport, modified activities, use of specialist equipment or involvement of additional staff.
- Personal Emergency Evacuation Plans (PEEPs) must be reviewed to determine whether any adjustments are required for the visit environment.
- Where medication, treatment or specific interventions are needed, Visit Leaders must ensure that staff with appropriate training are available and briefed.

5.3 Communication with families

- Parents and carers must be informed early of the arrangements for the visit so they can discuss any additional needs.
- Visit Leaders must work collaboratively with families to understand the pupil's needs and agree appropriate adjustments.
- Where relevant, health professionals or external agencies working with the pupil may also be consulted during planning.

5.4 Participation and alternative arrangements

- LAT expects Visit Leaders to plan activities in ways that allow broad participation wherever possible.
- Exclusion from a visit should only occur where all reasonable adjustments have been considered and participation cannot be made safe.
- If a pupil cannot take part in all parts of the visit, Visit Leaders should consider whether partial participation is possible.
- If a pupil cannot attend the visit due to safety concerns that cannot be mitigated, the academy must provide meaningful alternative activities on site.

5.5 Staff responsibilities

- Staff must understand the needs of pupils in their group and be briefed on any additional measures required to support them.
- Staff must follow the adjustments set out in the risk assessment and seek further guidance from the Visit Leader if difficulties arise.
- The Visit Leader must confirm that all staff understand their roles before the visit departs.

6 Behaviour

6.1 Pupil behaviour expectations

- All pupils participating in educational visits must follow the LAT Behaviour and Discipline Policy and any academy specific behaviour procedures.
- Where an academy operates a written Code of Conduct for visits, the Visit Leader must ensure that pupils and parents read and sign it before the visit.
- Pupils must behave in a way that supports their own safety and the safety of others whilst off site. This includes following instructions promptly, staying with the group and respecting the authority of staff and volunteers.
- Pupils must not bring prohibited items or substances on any visit. The academy's behaviour policy applies in full during all aspects of a visit including travel, free time and accommodation.
- LAT does not permit the consumption of alcohol by pupils on any visit. The only exception may apply in specific Sixth Form contexts during overseas visits, where lawful consumption with a meal may be permitted only if agreed in advance by the Principal and parents and supervised by staff.
- Smoking or vaping is not permitted at any time.
- The possession or use of illegal drugs or unauthorised substances is strictly prohibited and will be treated as a serious disciplinary matter.

- LAT does not permit pupils to engage in any sexual activity during a visit. Staff must remain aware of existing relationships and be alert to any behaviour that breaches this rule.
- Any behaviour that compromises safety or breaches policy may result in immediate sanctions during the visit and on return to the academy.

6.2 Consequences of serious behaviour breaches

- In the event of a serious breach of behaviour expectations, the Principal may require the pupil to return home.
- Where this occurs, parents may be responsible for any associated costs including travel, accommodation or staff supervision required to facilitate the pupil's return.
- Pupils who are removed from a visit due to behaviour may be restricted from attending future visits.
- Serious incidents may result in formal disciplinary action on return to the academy, including suspension or permanent exclusion in line with Trust policy.

6.3 Staff expectations and conduct

- All staff participating in visits must comply with the LAT Code of Conduct.
- Staff must act professionally at all times, maintain appropriate boundaries and apply academy behaviour policies consistently.
- During residential visits, staff have a 24 hour responsibility for pupil welfare, although they must not be on duty continuously. Duty rotas must therefore be followed and ensure that a rota clearly shows the designated staff member is on duty at all times.
- Staff may consume alcohol in moderation during residential visits when off duty but must remain within UK drink driving limits. At least one member of staff must be entirely alcohol free at all times.
- The Visit Leader may impose a complete ban on alcohol for staff where the nature of the visit or activity requires it.
- Staff must follow supervision and safeguarding expectations at all times, including ensuring that pupils are not left unsupervised or in situations where they may be at risk.
- Staff must report any behaviour concerns or incidents promptly to the Visit Leader.
- Any safeguarding concern, low level concern or allegation arising during a visit must be reported immediately to the Visit Leader who will escalate in line with the LAT Code of Conduct and Safeguarding Policy.

6.4 Volunteer expectations and conduct

- Volunteers must follow the same standards of conduct expected of LAT staff when supporting educational visits. They act under the direction of the Visit Leader and must uphold the values, safeguarding requirements and behaviour expectations of the academy.
- Volunteers must behave in a calm, professional and respectful manner at all times. They must support staff in supervising pupils and contribute positively to the safety and wellbeing of the group.
- Volunteers must maintain appropriate boundaries with pupils. They must avoid physical contact that is not required for care or safety, avoid unaccompanied situations with individual pupils and avoid conversations or behaviour that could be interpreted as inappropriate.
- Volunteers must not use foul, aggressive or inappropriate language. They must model the behaviour expected from pupils and must reinforce instructions given by staff.

- Volunteers must remain with the group at all times unless given permission by the Visit Leader. They must not make independent decisions about supervision, group movement or pupil management.
- Volunteers must not consume alcohol, smoke or vape at any point during a visit. They must not use any substances that impair judgement.
- Volunteers must not administer first aid unless they have appropriate training and have been asked to do so by the Visit Leader. Any medical concern must be reported immediately to staff.
- Volunteers must follow all safeguarding procedures, including reporting any concern about a pupil's welfare to staff as soon as possible. Volunteers must not investigate or respond to disclosures themselves.
- Volunteers must respect confidentiality. They must not share information about pupils, staff or incidents during the visit with other parents, members of the public or on social media.
- Volunteers must follow all instructions from the Visit Leader and staff, including directions relating to behaviour management, safety controls, movement around venues, transport arrangements and emergency procedures.
- Where a volunteer behaves in a way that does not meet expectations, the Visit Leader or Principal may ask the volunteer to withdraw from the visit. Serious concerns will be escalated through LAT safeguarding or conduct procedures as appropriate.

7 Monitoring and Compliance

7.1 Quality assurance and oversight

- Leigh Academies Trust expects consistent and compliant use of the EVOLVE system across all academies.
- The EVC must monitor visit practice within their academy and provide guidance to staff as required. This includes ensuring correct approval routes, complete documentation and suitably prepared Visit Leaders.
- Principals must maintain oversight of all visits submitted through EVOLVE and review compliance patterns over time.
- The Operations Excellence Team will receive periodic summaries of visit activity from across the Trust, highlighting trends in compliance, approval timelines, visit volume and any concerns requiring escalation.
- The Operations Excellence Team may request additional assurance from academies where patterns of late submissions, incomplete documentation or inconsistent practice are identified.
- Academies must act promptly on any identified weaknesses in visit planning, risk assessment or staff training.

7.2 Internal monitoring within academies

- Following each overseas visit the Trip Leader must complete a What Went Well / Even Better If (WWW/EBI) evaluation and submit it to the EVC within ten working days of the visit taking place. The evaluation should cover the educational outcomes, logistics, safeguarding, supervision, and any issues encountered.
- EVCs must conduct regular reviews of EVOLVE records to confirm that risk assessments, approval routes, staff qualifications and safeguarding considerations meet policy expectations.

- EVCs must carry out post visit evaluations, reviewing feedback from Visit Leaders, staff and pupils where appropriate.
- Evaluations must be stored on EVOLVE and must highlight any issues that need to be addressed before future visits of the same type take place.
- The Principal must review evaluation outcomes periodically to identify themes relating to safety, behaviour, logistics or staffing.
- Any incident, accident or near miss must be recorded on EVOLVE and then reported in line with LAT's incident reporting procedures. If no incidents have occurred this should be recorded also.

7.3 External monitoring and assurance

- LAT may conduct desktop reviews of EVOLVE visit records to confirm consistent application of policy across academies.
- LAT may also carry out in person reviews of visits, focusing on supervision, staff conduct, risk mitigation and adherence to approved plans.
- Findings from monitoring activities will be shared with Principals and EVCs, along with any required actions.
- Where compliance concerns persist, the Operations Excellence Team may recommend additional training or revise local procedures.

7.4 Legal compliance and raising concerns

- All staff have a responsibility to raise concerns about unsafe practice, unmanageable risks or systemic issues that could compromise safety during visits.
- If a staff member believes an activity cannot be delivered safely, they must stop the activity and notify the Visit Leader immediately.
- Staff have the right to withdraw from an activity if they believe it is unsafe. In such circumstances, the Visit Leader must make alternative arrangements to maintain pupil safety.
- EVCs and Principals must respond appropriately to any concerns raised and investigate them promptly.
- The Operations Excellence Team may intervene if an academy fails to manage concerns appropriately or where incidents indicate repeated non-compliance.

8 Finance and insurance

8.1 Financial planning and approval

- Financial planning must begin at the outset of visit preparation. Visit Leaders must complete an **Educational Visit Finance Form** and submit it to the academy's Finance Manager for review and approval before uploading it to EVOLVE as part of the trip approval process.
- The Finance Form must include detailed costing for all elements of the visit, including accommodation, travel, entry fees, food, equipment, insurance, staff cover costs and contingency funding if any.
- The Finance Manager must review and approve the Finance Form before it is submitted to EVOLVE.
- The EVC must then check that the Finance Form is complete and has been approved by the Finance Manager before approving a visit or escalating it to the Principal.

- No visit may be publicised or opened to parents until the financial arrangements have been approved through EVOLVE.
- If a pupil is eligible for PPG and the cost of their place on the trip is being subsidised, this should be agreed as part of the initial costing.
- Once the Educational Visit Finance Form has been approved by the Finance Manager and EVC, Visit Leaders must raise purchase orders through the academy's normal purchasing workflow for all trip-related expenditure. Purchase orders must reference the approved Finance Form and should be raised before any commitments or bookings are confirmed with suppliers. All invoices must be processed through the academy finance office in line with standard financial procedures.

8.2 Charging for visits

- All academies must comply with the LAT Charging and Remissions Policy.
- The Charging and Remissions Policy outlines what academies may charge for, including optional visits outside the academy day, and what must be provided free of charge.
- Parents must be informed clearly of the costs, payment schedule and any voluntary contributions where applicable.
- Schools must not discriminate against pupils whose parents are unwilling or unable to make voluntary contributions.
- Where a pupil is entitled to remissions or support, the academy must apply this in accordance with Trust policy.
- Academies must not ask parents to pay payment directly to any third party as this will void our insurance cover.

8.3 Costing of visits

- The Visit Leader is responsible for identifying all costs linked to the visit and confirming they are accurate and complete. Costs to be included, where applicable, are:
 - Accommodation
 - travel and transfers
 - Meals
 - entry fees or tickets
 - specialist activities
 - staffing cover required for absent staff
 - administration and planning costs
 - Insurance
 - contingency funding.
- A contingency allowance of up to 5% may be included in the total trip cost, applied at the discretion of the Visit Leader based on the nature and specification of the trip. Factors such as overseas travel, potential exchange rate movements or variable activity costs should be taken into account when determining the appropriate level of contingency required.
- Visit Leaders must work with the academy finance team to check that payment arrangements, deadlines and accounting processes align with LAT financial regulations.

8.4 Accounting and record keeping

- A full, accurate record of all income and expenditure must be kept for every visit.

- All financial activity relating to the visit must be processed through the academy finance office. Staff must not use personal bank accounts under any circumstances.
- Receipts, invoices and payment records must be retained for six years and must be available for audit on request.
- If petty cash is required for a visit, this must be agreed in advance with the academy's Finance Manager and handled in line with Trust financial procedures.
- When a pupil withdraws from a visit, the academy may retain sufficient funds to cover any irrecoverable costs incurred on their behalf.

8.5 Insurance

- Each academy must confirm that suitable insurance is in place for all educational visits. LAT academies are covered by the Department for Education [Risk Protection Arrangement \(RPA\)](#).
- RPA cover includes employer liability, public liability and overseas travel.
- The Visit Leader, EVC and Principal must check that RPA or any additional insurance covers all activities planned.
- Certain adventurous or specialist activities may not be covered under RPA. In such cases, the Principal must arrange additional insurance and inform parents of the cover provided.
- If the visit is booked through a tour operator, the Visit Leader must confirm whether additional insurance has been included and ensure it aligns with the Trust's requirements.
- Where overseas travel is involved, parents must be informed of the insurance arrangements and asked to confirm acceptance of these through the consent process.
- If a pupil withdraws from an overseas visit and cancellation is covered by the insurance policy, the academy must notify the insurer and operator promptly to minimise any cost.

9 Data protection and GDPR

9.1 Data protection responsibilities

- All staff (including volunteers) involved in planning or supervising educational visits must comply with the LAT Data Protection Policy and UK GDPR requirements.
- Educational visits require the collection and use of personal data, including sensitive medical information. This data must be handled securely at every stage of planning and delivery.
- Leigh Academies Trust is the Data Controller for all personal data processed in connection with educational visits. The Principal acts as the Information Asset Owner for visit-related data within their academy. The Principal is responsible for making sure that staff handle this data in line with LAT policies and that it is processed lawfully, securely and only for legitimate purposes.

9.2 Handling personal data during planning

- Visit Leaders must only collect personal data that is necessary for the safe planning and supervision of the visit.
- Personal data used for visits may include pupil and staff contact details, medical information, dietary requirements, passport information, emergency contact details and relevant behavioural information.
- All such data must be kept securely and uploaded to EVOLVE where possible so it is held in a secure system accessible to authorised staff only.

- Where external providers require personal data, such as accommodation, airlines or activity centres, the Visit Leader must confirm that these organisations are compliant with data protection requirements and will store data appropriately.

9.3 Data storage and transfer

- Staff must avoid using personal devices for storing visit data unless approved by the academy and encrypted.
- Any paper based documents containing personal data must be kept secure and not left unattended at any point. For example, keeping the paper data in a locked away when not in use.
- Emergency packs carried during visits must include essential personal data, but staff must take suitable steps to protect this information from unauthorised access, loss or damage.
- Any loss or potential breach of personal data must be reported immediately to the Principal and processed under LAT data breach procedures.

9.4 Use of third party providers

- When a visit involves third party organisations collecting personal data, such as travel companies, hotels or specialist activity providers, the Visit Leader must confirm that the provider uses the data strictly for the purposes of the visit.
- Providers must not retain personal data for longer than required or use it for purposes other than delivering the service requested.
- Where providers operate overseas, the Visit Leader must confirm that any transfer of personal data is carried out lawfully. This may include the UK International Data Transfer Agreement, the UK Addendum to the EU Standard Contractual Clauses, or an Adequacy Regulation

9.5 Data retention and deletion

- Visit Leaders must ensure that personal data is retained only for the period specified in [LAT's Data Retention Schedule](#).
- Data such as contact details, risk assessments and evaluations must be stored in accordance with Trust retention periods and then securely deleted.
- Where external providers hold data temporarily, the Visit Leader must confirm that the provider deletes the data once it is no longer required.

9.6 Photography during visits

- Photography on educational visits must follow LAT safeguarding and data protection expectations. Only the dedicated academy trip phone may be used to take photographs or video recordings during a visit.
- Staff must not use personal devices for photography under any circumstances. Images must only be taken for legitimate educational purposes linked to the visit and must be stored and transferred securely in line with academy procedures.
- Pupils must not be permitted to take photographs of other pupils during a visit. This includes on mobile phones, tablets or any other device. Pupils may take photographs of landscapes or exhibits where permitted, provided no other pupils are captured in the image.
- The Visit Leader must brief staff, volunteers, providers and pupils on the photography rules before departure and must monitor compliance throughout the visit.

- All photographs must be transferred to the academy's secure system promptly on return and deleted from the trip phone once the transfer has been confirmed. Photographs must not be shared on personal accounts or devices.
- If a venue or activity provider proposes to take photographs, the Visit Leader must check parental consents and confirm that the provider will handle images securely.

10 Emergency procedures and incident reporting

10.1 General expectations

- Every visit must have clear, pre planned emergency procedures that all staff understand before departure.
- The safety and wellbeing of pupils and staff must be the overriding priority in any emergency.
- Visit Leaders must brief all accompanying staff on emergency protocols, communication arrangements and individual responsibilities.
- Emergency procedures must be proportionate to the nature of the visit, including the location, duration, group composition and risks involved.

10.2 Emergency contact arrangements

- Every visit listed on EVOLVE must name a senior leader of the academy as the designated emergency contact for the duration of the visit.
- The designated senior leader must:
 - have access to EVOLVE and all visit documents
 - be available during the period of the visit 24 hours a day
 - hold contact information for all members of the group
 - understand the academy's critical incident procedures.
- Visit Leaders must carry emergency contact numbers for:
 - the academy's designated senior leader
 - the academy Principal
 - academy based administrative support where relevant
 - emergency services local to the visit location.
 - Risk Protection Arrangements (RPA)
- For Default and adventurous trips the Trip leader should be assigned a dedicated mobile phone. For residential and overseas visits, the Visit Leader must confirm communication arrangements including ensuring that two dedicated trip mobile phones are assigned and checked to ensure they have roaming capability and local emergency service numbers.

10.3 During an emergency

- The Visit Leader is responsible for managing the immediate response to any emergency until local emergency services or senior academy staff take over. An adult member of staff should remain with any injured party until parent/other is able to take responsibility
- In the event of an emergency, the Visit Leader must:

- take immediate action to safeguard pupils and staff
 - contact emergency services where required
 - administer first aid if trained and safe to do so and inform the academy's designated emergency contact as soon as possible
 - record key information including time, location, nature of incident and people involved.
 - Secure the contact details for the venue's point of contact regarding the incident.
- Staff must follow the Visit Leader's instructions and support the management of the situation.
 - Pupils must be kept together and supervised at all times.

10.4 Activation of academy and Trust critical incident procedures

- The designated senior leader will decide, in consultation with the Principal, whether the academy's critical incident plan should be activated.
- If required, the Principal will coordinate the academy's critical incident response, in line with the LAT Emergency Response Plan including:
 - communication with parents
 - liaison with emergency services
 - coordination with the Gold/Silver/Bronze command structure as set out in the LAT Emergency Response Plan
 - media handling in consultation with the Trust Communications team
 - ensuring appropriate support for staff and pupils.
 - Trust leaders may take responsibility for wider stakeholder communications depending on the scale of the incident.

10.5 Communication with parents and carers

- Parents must be informed promptly where a serious incident affects the safety or wellbeing of their child.
- Communication must be coordinated through the academy to avoid conflicting information.
- Visit staff must not share unverified information with parents via personal devices.
- For minor incidents where pupils remain safe and the visit continues, the Visit Leader may update parents through the academy's agreed communication channels.

10.6 Incident, accident and near miss reporting

- All incidents should be immediately reported to the EVC and Principal
- All incidents, accidents and near misses must be recorded on EVOLVE as part of the visit record and also added to Bromcom, this includes any incidents or near misses involving allergic reactions. A no incident comment added to Evolve at end of visit for clarity
- The Visit Leader must complete a factual and accurate report as soon as possible after the event.
- Serious incidents must also be reported to LAT's H&S Compliance team.
- The Principal must review all incident reports and ensure follow up actions are completed.
- The EVC must review patterns of incidents as part of ongoing monitoring and feed these into future planning and staff training.

10.7 Post-incident support

- Staff and pupils involved in traumatic or stressful incidents must be offered appropriate support.
- The Principal will assess the level of support required and may engage external professionals where needed.
- The academy may also carry out a debrief with staff and pupils to reflect on the incident and identify learning for future practice.
- Appropriate action shall be taken in circumstances when risk control measures have not been complied with or otherwise failed, including where this resulted in an adverse event.
- Where necessary, a proportionate investigation shall be conducted by the H&S Compliance Team to determine immediate, underlying and root causes

Appendix 1

Educational Visit Checklist

Academy		Date(s)	
Visit Leader		Destination	
EVC		Visit type	
Number of pupils		Number of staff	

How to use this checklist

The Visit Leader must complete this checklist during the planning stage and upload it to EVOLVE as part of the visit approval record. Tick each item once you have confirmed it is in place. Mark N/A only where the item is not applicable to this visit type. Items marked N/A must be justifiable. This checklist does not replace the risk assessment or other required documentation; it supports the audit trail alongside those records.

Items marked N/A are relevant only to specific visit types (for example, overnight, adventurous or overseas visits). Where an item is not applicable, mark N/A and note the reason in EVOLVE if helpful.

Requirement	✓	N/A
Section 1: Visit Planning and Purpose		
The visit has clear aims and curriculum links recorded on EVOLVE.	☐	N/A
The visit category has been correctly identified (default, overnight, adventurous or overseas).	☐	N/A
The visit has been submitted on EVOLVE within the required lead time: minimum 6 academic weeks for default, overnight and adventurous visits; minimum 10 academic weeks for overseas visits.	☐	N/A
The visit has not been advertised or opened to parental payment before EVOLVE approval has been granted.	☐	N/A
A pre-visit has been completed for higher risk activities, or the Principal is satisfied that sufficient information has been obtained.	☐	N/A
Pre visit meetings arranged for staff	☐	N/A
Section 2: Staffing and Roles		
A designated Visit Leader has been identified. The Visit Leader is directly employed or contracted by the academy.	☐	N/A
The EVC has reviewed the visit submission and confirmed compliance with policy requirements.	☐	N/A
The competence, qualifications and experience of the Visit Leader and accompanying staff have been assessed by the EVC.	☐	N/A
Supervision ratios have been determined through the risk assessment and meet or exceed LAT minimum ratios.	☐	N/A
A Deputy EVC has been identified and is available to act if the EVC is unavailable.	☐	N/A
For overnight and overseas visits, adults of more than one gender are included, or the Principal has confirmed that safeguarding arrangements remain robust.	☐	N/A
A duty roster has been created for residential visits.	☐	N/A
Section 3: DBS Checks and Safeguarding		
DBS checks have been confirmed for all staff through People Services.	☐	N/A

DBS checks have been confirmed for all volunteers, or a volunteer risk assessment has been completed and approved by the Principal.	☐	N/A
For overnight and overseas visits, all volunteers hold a current DBS check.	☐	N/A
A member of staff with delegated safeguarding responsibility (ideally a trained DDSL) has been identified for overnight and overseas visits.	☐	N/A
Where a DDSL cannot be included, clear arrangements are in place for immediate access to a DSL or DDSL, including a direct contact route and escalation protocol.	☐	N/A
Staff and volunteers have been briefed on safeguarding expectations, professional boundaries and their responsibilities during the visit.	☐	N/A
Room allocation and supervision arrangements have been reviewed to reflect safeguarding requirements for residential visits.	☐	N/A
Section 4: Risk Assessment		
A written risk assessment has been completed that is specific to this visit.	☐	N/A
The risk assessment covers the activity, group, environment, weather, transport, supervision arrangements and individual pupil needs including all pupils with known allergies	☐	N/A
Generic risk assessments, if used, have been adapted to reflect the specific visit.	☐	N/A
The risk assessment has been uploaded to EVOLVE and reviewed by the EVC.	☐	N/A
The risk assessment has been reviewed and approved by the Principal for overnight, adventurous and overseas visits.	☐	N/A
All staff and volunteers have been briefed on the risk assessment before departure.	☐	N/A
Individual risk assessments have been completed for pupils with SEND, disabilities or medical needs.	☐	N/A
Public health, seasonal and localised risks have been considered and reflected in the risk assessment.	☐	N/A
A Personal Emergency Evacuation Plan (PEEP) has been reviewed for any pupil with mobility needs.	☐	N/A
Pre visit meetings arranged for parents (overseas etc)	☐	N/A
Section 5: Medical Needs and First Aid		
First aid requirements have been assessed. A first aider will be present on the visit.	☐	N/A
Staff with appropriate first aid qualifications are included for higher risk, remote or early years visits.	☐	N/A
A fully stocked first aid kit will be carried throughout the visit.	☐	N/A
Medical needs, allergies and prescribed medication have been identified for all pupils.	☐	N/A
Staff have been briefed on medical needs and know how to administer any prescribed medication, including auto injectors where relevant.	☐	N/A
Clear plans are in place for the safe storage, access and use of any medication during the visit.	☐	N/A
Parental consent for emergency medical treatment has been obtained.	☐	N/A
Section 6: Transport		
A transport checklist has been completed by the provider, or confirmed as completed for another LAT academy within the last 12 months.	☐	N/A

The completed transport checklist has been uploaded to EVOLVE.	☐	N/A
Staff will carry out basic visual checks of transport on the day of travel.	☐	N/A
Personal vehicles will not be used to transport pupils.	☐	N/A
No sixth form students will drive other students to or from the visit venue.	☐	N/A
Section 7: Parental Consent and Communication		
Parents have been informed of the visit in advance.	☐	N/A
Written parental consent has been obtained where required: visits outside normal academy hours, residential visits, overseas visits, adventurous activities or nursery-age pupils.	☐	N/A
Verbal consent, if accepted in urgent circumstances, has been recorded on EVOLVE.	☐	N/A
Pupils without appropriate consent will remain on site with suitable supervised activities.	☐	N/A
Parents have been clearly informed of all costs, payment schedules and any voluntary contribution arrangements.	☐	N/A
Section 8: External Providers		
The external provider holds nationally recognised accreditation (e.g. LOTC Quality Badge or Adventuremark).	☐	N/A
Where accreditation is not held, a completed provider statement has been requested and uploaded to EVOLVE.	☐	N/A
The Visit Leader has written their own risk assessment covering risks to the group.	☐	N/A
Data protection compliance has been confirmed for any provider that will hold personal data.	☐	N/A
Section 9: Emergency Pack and Contact Arrangements		
The Visit Leader carries an emergency pack containing pupil contact details, medical information, staff contacts and individual risk assessments.	☐	N/A
The deputy leader carries a second emergency pack.	☐	N/A
A copy of the same information is held at the academy with the designated on-call senior leader.	☐	N/A
A senior leader has been named as the designated emergency contact on EVOLVE and is available throughout the visit.	☐	N/A
For default and adventurous trips, the Visit Leader has been assigned a dedicated mobile phone.	☐	N/A
For residential and overseas visits, two dedicated trip mobile phones have been assigned and checked for roaming capability and local emergency service numbers.	☐	N/A
The Visit Leader holds contact numbers for: the designated senior leader, Principal, administrative support and local emergency services.	☐	N/A
Emergency contact numbers for the DfE Risk Protection Arrangement (RPA) are included in the emergency pack.	☐	N/A
Sensitive data will be stored securely during the visit. Any loss or breach will be reported immediately to the Principal.	☐	N/A
Section 10: Finance and Insurance		
An Educational Visit Finance Form has been completed and approved by the academy Finance Manager before submission to EVOLVE.	☐	N/A

The Finance Form includes all costs: accommodation, travel, meals, entry fees, activities, staffing cover, administration, insurance and contingency.	☐	N/A
A contingency allowance of up to 5% has been included where appropriate.	☐	N/A
PPG subsidy arrangements have been agreed as part of the initial costing, where applicable.	☐	N/A
The visit has not been publicised or opened to parents before financial arrangements have been approved through EVOLVE.	☐	N/A
Parents have not been asked to pay any third party directly.	☐	N/A
Insurance cover under the DfE Risk Protection Arrangement (RPA) has been confirmed as suitable for all activities planned.	☐	N/A
Additional insurance has been arranged and parents informed where RPA does not cover specific adventurous or specialist activities.	☐	N/A
For overseas visits, parents have been informed of insurance arrangements and asked to confirm acceptance through the consent process.	☐	N/A
Section 11: Data Protection		
Only personal data necessary for the visit has been collected and stored on EVOLVE.	☐	N/A
Personal data will not be stored on personal devices unless approved and encrypted.	☐	N/A
Paper documents containing personal data will be kept secure and not left unattended.	☐	N/A
Only the dedicated academy trip phone will be used for photography. Staff will not use personal devices.	☐	N/A
Pupils have been briefed on photography rules before departure.	☐	N/A
Photographs will be transferred to the academy secure system promptly on return and deleted from the trip phone.	☐	N/A
Any provider intending to take photographs has had parental consents checked and image handling confirmed.	☐	N/A
Section 12: Behaviour		
Pupils have read and signed the academy Code of Conduct for visits, where applicable.	☐	N/A
Pupils have been briefed on behaviour expectations, including rules on prohibited items, substances, alcohol and prohibited activities.	☐	N/A
Staff have been reminded of conduct expectations, including the alcohol and safeguarding rules that apply during residential visits.	☐	N/A
Volunteers have been briefed on conduct expectations, including professional boundaries, photography restrictions and reporting responsibilities.	☐	N/A
Section 13: Approvals		
The EVC has reviewed and approved the visit (default visits).	☐	N/A
The EVC has given initial approval and passed the visit to the Principal (overnight, adventurous and overseas visits).	☐	N/A
The H&S Compliance Team has been consulted and has confirmed approval before the Principal approves the visit (adventurous and overseas visits).	☐	N/A
The Principal has given final approval on EVOLVE before the visit departs.	☐	N/A
Approval is evidenced on EVOLVE. The visit has not departed without this confirmation.	☐	N/A

Section 14: Post-Visit Requirements		
All incidents, accidents and near misses have been recorded on EVOLVE and reported to the EVC and Principal.	☐	N/A
Serious incidents have been reported to the LAT H&S Compliance Team and added to Bromcom.	☐	N/A
A WWW/EBI evaluation has been completed for all overseas visits within ten working days of return.	☐	N/A
Evaluation outcomes have been stored on EVOLVE and any issues identified for future planning.	☐	N/A
Photographs have been transferred to the academy secure system and deleted from the trip phone.	☐	N/A
Personal data is being retained in line with the LAT Data Retention Schedule.	☐	N/A

Declaration

I confirm that I have completed this checklist accurately and that all applicable requirements have been addressed or noted. I understand that this checklist forms part of the required audit trail for this visit.

Visit Leader name		Date
Visit Leader signature		
EVC name		Date
EVC signature		
Principal name		Date
Principal signature		

This completed checklist must be uploaded to EVOLVE and retained as part of the visit record.

Appendix 2

Medication requirements for educational visits

This appendix applies to all LAT academies. It sets out the minimum requirements for managing pupil medication on educational visits. It must be read alongside section 3.11 on consent for medical treatment, section 3.12 on first aid and section 4.3 on risk assessing pupils with SEND, disability or medical needs.

Risk assessments must cover medical requirements, the management of regular and controlled medication, and individualised behaviour support. Pupils with significant medical or behavioural needs must receive support that matches or exceeds the provision they receive during a standard academy day, as set out in their EHCP and their individual health and behaviour plans. Staffing must be planned on that basis and recorded in the risk assessment. Supervision ratios are set out in sections 3.7 and 3.14.

A2.1 Day visits, off site activities and work experience

Where controlled drugs are required, the visit must be accompanied by at least two staff who are trained and signed off as competent to administer medication, or to witness its administration.

A designated responsible person must oversee the secure custody of each pupil's medication and Individual Health Plan (IHP). The IHP must contain up to date parental contact details.

Regular medication must be transported in a locked orange medical pack. Emergency medication, emergency plans and related records, such as seizure logs, must be carried in orange bags.

Staff must pack any equipment needed for administration, such as spacers or syringes, and must include when required medicines, such as paracetamol, where the risk assessment identifies a need. Any controlled drugs must be formally signed out of the register by two members of staff.

A2.2 Residential visits and international travel

The following handover protocol must be followed.

1. All medication must be transported in a sealed envelope signed across the seal by the family.
2. On receipt at the academy, the sealed envelope must be locked in the medical room medication cupboard or a designated medication lockbox for the duration of the residential.
3. On return, any remaining medication must be handed directly to the designated responsible adult.
4. Where a residential involves international travel, specific advice on medication, including controlled drugs, must be obtained in advance from the Home Office or the embassy of the destination country.
5. Where medication is in liquid form, the airline must be contacted in advance to confirm its protocols for carrying liquids and to make sure the required documentation is prepared.

A2.3 Requirements during the visit

The visit team must include a designated First Aider. Where controlled medication may need to be given during the visit, the team must also include two staff trained to administer medication. Travelling first aid kits and individual pupil medication must be carried at all times.