



## Merchant Taylors' Schools, Crosby

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# Educational Visits Policy

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Policy Owner	Headteacher
Policy Author	Assistant Head Compliance
Last reviewed by Date	Assistant Head Compliance November 2025
Last approved by <u>Date</u>	Exec Team November 2025
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Circulation:	All Staff & Governors Parent Portal Senior & Sixth Pupils
Related Policies:	Health and safety policy Charging and remissions policy Code of Conduct Behaviour policy Safeguarding policy First aid policy SEND policy Equality, Diversity and Inclusion policy Accessibility plan Early Years Foundation Stage (EYFS) policy
Regulatory Body (if applicable)	DFE ISI

<p>Relevant legislation/guidelines</p>	<p>DfE, <i>Health and Safety on Educational Visits</i>, current version  Education Act 1996  Education and Inspections Act 2006  Education and Skills Act 2008  The Education (Independent School Standards) Regulations 2014, as amended  DfE, <i>The Independent School Standards: Guidance for Independent Schools</i>, current version  Equality Act 2010  Children Act 1989  Children Act 2004  Children and Social Work Act 2017  Keeping Children Safe in Education, 2025  Working Together to Safeguard Children, 2026  SEND Code of Practice: 0 to 25 years  Early Years Foundation Stage Statutory Framework for group and school-based providers  Health and Safety at Work etc. Act 1974  Management of Health and Safety at Work Regulations 1999  Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013, where applicable  DfE, <i>Behaviour in Schools</i>  DfE, <i>Searching, Screening and Confiscation</i>  DfE, <i>Mobile Phones in Schools</i>, current version, where relevant to visits  DfE, <i>Charging for School Activities</i>  OEAP National Guidance  HSE guidance on school trips and sensible, proportionate health and safety management  FCDO foreign travel advice  Adventure Activities Licensing Regulations 2004</p>
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## 1. Aims

- 1.1 This is the Educational Visits policy of Merchant Taylors' Schools, Crosby (the school)
- 1.2 Educational visits are activities arranged by, or on behalf of, our school, which require pupils to leave the school premises, having been authorised to do so by the headteacher or other designated member of staff.

Educational visits broaden students' horizons, building ambition by offering new environments in which to learn and offering real-world opportunities beyond the classroom. Trips strengthen character through challenge, teamwork, and resilience, whilst nurturing excellence by deepening understanding, curiosity, and high-quality learning. Above all, these experiences promote personal growth, helping pupils gain confidence, independence, and a richer sense of who they are and who they can become.

- 1.3 This policy sets out our approach to planning and operating educational visits, to ensure the health and safety of our pupils and staff, and to make sure that our visits are available to all pupils. It sets out the roles and responsibilities of staff, pupils and volunteers when it comes to visits.

This policy applies to activities taking place within and outside of normal school hours, including weekends and holiday periods. This includes (but is not limited to):

- Visits to places of interest in the local area
- Day visits to places such as museums and other cultural and educational institutions
- Sporting activities
- Adventurous and recreational activities
- Residential trips organised by the school
- Trips abroad organised by the school

## 2. Legislation and Guidance

- 2.1 This policy is based on the Department for Education's guidance on [health and safety on educational visits](#), and the following legislation and statutory guidance:

- [Equality Act 2010](#)
- [SEND Code of Practice](#)
- [Keeping Children Safe in Education 2025](#)

Sections of this policy are also based on the [statutory framework for the Early Years Foundation Stage](#).

We follow the National Guidance of the Outdoor Education Advisers Panel (OEAP) when planning and delivering all educational visits, ensuring our procedures meet nationally recognised expectations for safe and effective off-site learning.

### **3. Roles and Responsibilities**

#### **3.1 Headteacher**

The Headteacher retains overall responsibility for the approval and safe management of educational visits. Operational approval may be delegated to the Senior Deputy Head, EVC or other designated senior leader, but accountability remains with the Headteacher.

The Headteacher is responsible for ensuring that:

- a) educational visits are planned, approved and reviewed in accordance with this policy;
- b) staff, including the EVC and trip leads, have appropriate training, competence and support;
- c) higher-risk, adventurous, residential and overseas visits receive appropriate senior approval;
- d) all residential visits of more than 24 hours and all overseas visits are approved through the agreed senior leadership and governor approval route;
- e) governors receive appropriate assurance about the management of educational visits, including any significant incidents, risks or trends.

#### **3.2 The educational visits co-ordinator (EVC)**

Thomas Robinson is the appointed EVC at Stanfield. Jennifer Angwin is the appointed EVC at the Senior School. Their roles are to:

- Oversee and guide other staff to arrange and organise educational visits
- Assess the ability of other staff to lead visits and designate a suitable trip lead for each visit
- Assess outside activity providers
- Advise the headteacher and governing board when they're approving trips
- Access the necessary training, advice and guidance
- Evaluate all visits once complete, from planning to the visit itself, and use this to improve future arrangements

#### **3.3 Trip lead**

Every educational visit will have 1 member of staff designated as the trip lead. The trip lead will:

- Plan the proposed visit, taking into account the health and safety risks to pupils, staff and volunteers
- Assign staff and volunteer roles, as needed
- Make sure the school has accurate and up-to-date information about the trip destination, to be used in risk assessments

- Ensure the needs of all participants are considered, including medical, dietary, SEND, pastoral and behavioural requirements, as well as any mobility, cultural, safeguarding or mental-health considerations. Advice should be sought, where appropriate, from the Head of Division, School Nurse and Safeguarding Lead, and the trip lead must coordinate any additional support or adjustments necessary to enable safe and inclusive participation.
- Make sure parents and carers are given accurate information about educational visits, including any costs or necessary equipment not supplied by the school or a third party
- Communicate key details about the visit and all locations to staff, pupils and parents/carers, including roles and responsibilities and expected behaviour
- Make sure staff are capable and able to fulfil their roles at all times while responsible for pupils and others

### **3.4 Staff**

Staff have a responsibility to make sure all pupils and staff who take part in visits are kept safe and understand the proper way to prepare for trips, as well as how to act while taking part. All staff are responsible for safeguarding and must follow the same procedures off-site as they would on the school site, reporting any concerns about a pupil immediately.

Staff will:

- Read and contribute to all risk assessments, understanding their role in implementing control measures to mitigate against risk and work with the trip lead
- Log all incidents on the trip log and communicate with parents and carers to make sure trips are inclusive of all pupils' needs
- Look out for the health and safety of themselves and those around them
- Help manage pupil behaviour and discipline as required while on the visit
- Share any concerns or worries with the trip lead and others, as appropriate

### **3.5 Parents and carers**

By agreeing that pupils can take part in educational visits, parents/carers agree that they will:

- Provide all information required, such as emergency contact details and health/medicine information if applicable
- Sign and return consent forms and any other documentation required in a timely manner
- Share any concerns or information about the pupil that may affect or impact their ability to safely take part in the trip

### **3.6 Volunteers**

Volunteers attending school trips, including parent volunteers, agree to:

- Follow the directions of staff and act accordingly
- Behave appropriately and model good behaviour for pupils
- Report any concerns to the trip lead or other staff present as soon as possible
- Make sure pupils under their supervision are acting safely and appropriately, and raise any issues with staff as soon as possible

### **3.7 Pupils**

Our school behaviour policy also applies to all educational visits. This includes the expectation that pupils will:

- Follow instructions given to them while on the trip
- Dress and behave as expected for the length of the trip
- Take responsibility for their own safety and the safety of others, reporting any concerns to a staff member or trip supervisor
- Sign and agree to a behaviour contract for all residential trips

Pupils will always be reminded of our behaviour expectations before going off-site for a visit, and will be expected to uphold the school's behaviour policy at all times.

## **4. Planning and preparation**

4.1 The decision on whether or not a visit will take place will be made by the Senior Deputy Head and the EVC, and will be based on factors including:

- Cost (including any potential cost to parents/carers)
- Timing in the school year and any potential clashes
- Educational purpose and value
- Disruption to the normal running of the school
- Health and safety considerations
- Staff-to-pupil ratio
- Inclusion and accessibility
- Where demand is likely to exceed the number of available places, expressions of interest will be collected using the Evolve Platform. Places will be allocated randomly, witnessed by two members of the Senior Leadership Team. Details of how random selection takes place is given in Appendix 4

4.2 As part of the planning stage, information will be gathered by staff proposing the visit, including:

- Location and travel distance
- Travel plans or options

- Full cost breakdown, including multiple options where available
- Resources, including staffing, volunteers, and physical supplies
- Accommodation options, where needed
- Insurance detailed, where needed
- Risk assessment plans and first aid provision
- What safety measures can be put in place in order to reduce any risks
- Any additional minimum standards influenced by the age of the children, including appropriate supervision ratios, activity suitability, behaviour and communication needs, levels of independence, medical or personal-care support, travel logistics, and age-specific safeguarding considerations.

4.3 STAFF: See **appendix 1** for our trip information form for the planning and approval of a visit.

- 4.3.1 In cases where a newly introduced trip involves activities for more than 24 hours, an overnight stay and/or travel overseas, a presentation must be prepared and reviewed by members of the Executive Team. If approved, the headteacher will seek approval of the governing board.
- 4.3.2 Once the risk assessment has been approved by the headteacher, and the governing board where relevant, staff will communicate with parents/carers and provide trip information.
- 4.3.3 Written parental consent will be required for trips that take place outside of normal school hours, and for any trips requiring a higher-than-normal level of risk assessment.
- 4.3.4 We will evaluate each visit after its conclusion, from the planning through to the visit itself, to continually improve the planning and experience of our future visits.

#### 4.4. Inclusion

All pupils, regardless of background or abilities, should be able to take part in every aspect of school life, including visits.

**4.4.1 SEND** - If a pupil with a disability or an education, health and care (EHC) plan, or any other specific needs (e.g. medical conditions including allergies) is participating in the visit, they will have the same support that is available to them during the school day. We will adjust the trip programme where necessary, working with parents/carers to provide additional support, making reasonable adjustments to itineraries, providing additional support staff, and other adjustments as appropriate. Additional risk assessments may be carried out to ensure the safety of all staff and pupils.

#### 4.4.2 Behaviour, safety and individual risk assessment

A pupil will not be excluded from an educational visit solely because of SEND, disability, medical need, pastoral need or previous behaviour. Where there are concerns about whether a pupil can participate safely, the School will

consider reasonable adjustments and additional support, which may include adapting the itinerary, increasing staffing, providing individual supervision, adjusting transport or accommodation arrangements, or seeking specialist advice.

Where, following individual assessment and consultation with relevant staff and parents/carers, the School concludes that participation would present an unmanageable risk to the pupil, other pupils, staff or members of the public, the Headteacher or Senior Deputy Head may decide that the pupil cannot safely attend that visit. The reasons for this decision, the adjustments considered and any alternative arrangements will be recorded.

## **5. Risk assessment**

The School will complete a proportionate, visit-specific risk assessment for all educational visits. Risk assessment should begin as early as possible in the planning process and must be completed, reviewed and approved before the visit takes place. Low-risk local or day visits should normally be submitted at least two weeks in advance; residential, adventurous or overseas visits will require a longer planning period. The EVC may require earlier submission where the nature, location, activity, age of pupils, staffing, transport, safeguarding or medical needs make this necessary.5.1 Documentation

- 5.1.1 The Risk Assessment will be completed using the school's risk assessment template. A blank risk assessment can be found in the Operational Folder on the school's shared folder and in **appendix 2**.
- 5.1.2 All Risk Assessments must be reviewed and approved by the EVC.
- 5.1.3 Existing generic risk assessments can be found on the MTS shared drive. These can be used by staff to support the process of writing Risk Assessments, but must be personalised and specific to each trip.
- 5.1.4 Risk Assessments provided by the destination itself should be used alongside the Risk Assessment prepared by school, but never instead of.
- 5.1.5 The Risk Assessment will include any specific medical issues and allergies (for staff and pupils), the role of additional support on the visit, specified activities to be carried out, as well as risks associated with transport to and from the destination.
- 5.1.6 Where practical, staff may make a preliminary visit to the trip destination as part of the planning and risk assessment process, but this is not mandatory.
- 5.1.7 Trip leads will raise any concerns or questions about potential risks and safety measures with the headteacher and, where appropriate, third party vendors.
- 5.1.8 Every risk assessment will be approved by the headteacher, and a copy taken on the visit and another copy left with the EVC.

### **5.2 Staff ratios, supervision and first aid**

Safe supervision levels will be determined by risk assessment and will take account

of the age, number, needs and behaviour of pupils; the nature and location of the visit; transport arrangements; activities undertaken; medical needs; SEND; safeguarding considerations; staff competence; and the availability of support from the venue or provider.

The School does not rely on fixed ratios alone. Ratios must be sufficient to enable safe supervision, effective headcounts, pastoral support, emergency response and appropriate management of any pupil with additional needs.

First-aid provision will be proportionate to the visit. The risk assessment must identify the first-aid arrangements, first-aid equipment, medication arrangements, access to emergency medical treatment and any pupils or staff with known medical needs. For EYFS visits, at least one member of staff with a current paediatric first-aid certificate must accompany the visit.

For residential, adventurous, remote, overseas or higher-risk visits, at least one accompanying adult should normally hold an appropriate first-aid qualification, unless the EVC has approved alternative arrangements based on the risk assessment and provider provision.

Before departure, the trip lead will confirm that pupils who carry essential medication, including inhalers and adrenaline auto-injectors, have it with them. Where medication is held by staff, this must be recorded, securely carried and administered in accordance with the School's medical and first-aid procedures.

Risk assessments for each visit will ascertain the safe level of supervision required. On all educational visits, we will make sure:

- 5.2.1 On residential trips, at least 1 male and 1 female supervising adult is present (for mixed pupil groups)
- 5.2.2 At least 1 supervising adult able to administer first aid is present on all trips that are longer than 24 hours. For day trips, if no first aider is present, access to first aid and medical provision at the venue will be detailed in the risk assessment.
- 5.2.3 For EYFS at least 1 qualified paediatric first aider is present on all trips
- 5.2.4 Appropriate first aid equipment will be taken on all trips, in accordance with the school's first aid and health and safety policies.
- 5.2.5 All supervising adults will be made aware of any medical issues or allergies at the before the trip. At the start of the trip those pupils who carry their own medication, including inhalers for asthma and epipens for allergies will be checked to ensure they have those medications on them.
- 5.2.6 Adults without a DBS check will not be left alone with pupils at any time
- 5.2.7 The trip lead will take regular headcounts and/or rollcalls

### **5.3 Transport**

- 5.3.1 Transportation for trips will be organised by the school, in line with our safety procedures. We will make sure pupils, staff and volunteers are transported safely and efficiently, with the required first aid provision.
- 5.3.2 School minibuses are only to be driven by those staff who are on the approved driver list.
- 5.3.3 Unless previously agreed and communicated with parents, transport for visits will leave from, and return to, the school site.
- 5.3.4 For trips where pupils meet and depart from a location other than school, those pupils in Year 11 and below must be accompanied by a parent or guardian.
- 5.3.5 For trips where pupils meet and depart from a location other than school, Sixth Form pupils may arrive and leave independently, but this must be indicated on the consent form for that trip.

#### **5.4 Use of external organisations**

- 5.4.1 As part of the risk assessment process, we will check that any external organisations providing an activity have appropriate safety standards and liability insurance. This includes checking that organisations hold the Learning Outside the Classroom (LOtC) Quality Badge. Where an organisation does not, we will check additional details as outlined in the DfE's guidance on [health and safety on educational visits](#) to make sure it is an appropriate organisation to use.
- 5.4.2 We will have a written agreement in place with each external organisation outlining what everyone is responsible for during the activity.

## **6. Volunteers**

Where appropriate, parents and carers may be asked to volunteer to attend and supervise pupils alongside staff members on trips. Where more parents/carers volunteer than required on the visit, those invited to attend will be selected as fairly and transparently as possible, whilst taking into consideration:

- The needs of the pupils going on the trip
- The setting and circumstances of the trip
- Volunteers' skills, attitude and past behaviour, including previous volunteer experience

- 6.1 Parents/carers selected to volunteer will be informed at least 2 weeks ahead of the visit, and asked to confirm their attendance in writing. They will also be asked to confirm they agree with the expected behaviour. See **appendix 3** for our volunteer code of conduct for educational visits.

- 6.2 Volunteers will receive a full induction from staff members on the day of the visit, prior to departure, including a briefing on their responsibilities, expected behaviour, the process for raising concerns, emergency procedures and contact details, and the expected timetable of the trip.
- 6.3 Where practical and as required by the nature of visits (i.e. when volunteers may be left with children without staff members present), volunteers may be asked or required to undergo safeguarding checks, including DBS checks.
- 6.4 At no point will volunteers on whom no safeguarding checks have been carried out be left alone with pupils or given sole responsibility for the care of a pupil.

## **7. Communication and consent**

We will contact the parents and carers of pupils invited to take part in an educational visit at least 1 month before the proposed date of the trip. Communication will be via email and by MyEvolve, and information provided will include the date, travel times, destination, purpose of the visit, and the size of the group attending.

- 7.1 We will also communicate:
  - Times and details of travel, including drop-off and pick-up times and location
  - Pupil-to-staff ratios and staff qualifications, where relevant
  - Clothing and equipment required, and whether this is provided by the school
  - Expected behaviour and consequences of pupils' failure to meet these standards
- 7.2 Where required, parents/carers will be asked to provide written consent for educational visits by signing and dating a form to be returned to the school.
- 7.3 Because most visits during the school day will be part of the curriculum, we will not always need written consent. However, we will always inform parents/carers as above about any off-site visits, and give an opportunity for them to withdraw their child.
- 7.4 We will always get written consent before taking nursery-age children off-site.
- 7.5 Parents/carers will also be asked to provide current and relevant medical information and dietary requirements, as well as emergency contact numbers where they can be reached.
- 7.6 In the case of overseas trips, pupils will be asked to provide passport information and European Health Insurance Card or UK Global Health Insurance Card information, if available.

## 8. Emergency procedures and incident reporting

Generally, emergency planning will be defined as planning for:

- Serious and unexpected risk
- Serious and life-threatening injury
- Individuals going missing
- A serious breach of safeguarding expectations

8.1 The trip leader will be familiar with these plans for each visit.

8.2 In the case of an emergency, the trip leader or other supervising adult will contact the member of the Senior Leadership Team who is Base Contact. Either the Base Contact or the school office will then contact parents/carers as required, and inform them of changes to plans or cancellations of trips and/or alternative travel plans. This will form part of a wider communication plan that covers how routine communications should be handled in such situations.

8.3 A member of staff will always accompany a pupil seeking medical treatment.

8.4 If a pupil is missing or unaccounted for, the trip lead will act immediately. The activity should be paused where safe to do so, remaining pupils must be supervised securely, and an immediate headcount and local search must be undertaken. The trip lead will contact venue staff, security, the Base Contact and/or emergency services without delay, according to the level of risk and circumstances.

Police must be contacted immediately where there is any concern that the pupil may be at risk of harm, may have left the agreed area, may be vulnerable, may be near water, traffic or other hazards, may have been abducted or coerced, or where the location, time, weather, crowding or other circumstances increase risk.

Parents/carers will normally be contacted by the Base Contact or a senior member of staff once key facts are established, unless emergency services advise otherwise. A written record of actions, timings, decisions and communications must be kept.

8.5 All accidents, incidents, near misses, safeguarding concerns and significant behaviour incidents must be recorded and reported in line with the School's Health and Safety Policy, Safeguarding Policy, First Aid Policy and incident-reporting procedures.

The School will make any external notifications required by law or statutory guidance. This may include reporting to the HSE under RIDDOR where an incident is reportable; contacting children's social care, the LADO, police or other safeguarding partners where safeguarding thresholds are met; and notifying the relevant inspectorate, regulator or local authority where required, including in relation to EYFS provision. Significant incidents will also be reported to SLT and governors through the appropriate governance route.

- 8.6 Smaller incidents, accidents or near misses that do not require external reporting will still be covered by an internal report, to include steps that can be taken in the future to avoid similar incidents.
- 8.7 All trip leads will meet with the school's EVC, evaluating all visits and trips once they have been concluded from the planning through to the visit itself. This will help with evaluating whether planning worked and to learn from any incidents that took place.

## **9. Charging and insurance**

- 9.1 The school may charge for educational visits, but will always seek to ensure value for money and transparent costings.
- 9.2 Where pupils are in receipt of bursaries, the school will review whether bursary support can contribute to the cost of the trip and whether participation affects the overall bursary allocation.
- 9.3 For optional, non-curricular visits, the School may defer confirmation of a place where there are unresolved financial matters, following individual consideration and discussion with parents/carers. This will not be applied to compulsory curriculum visits, assessed course requirements or visits that form an essential part of the pupil's education without appropriate senior review. Decisions will be made fairly, proportionately and in line with the School's parent contract, Charging and Remissions Policy, bursary arrangements and equality duties.
- 9.4 We will make sure adequate insurance is in place for all trips, including, but not limited to: cancellation insurance for contracts with external providers, travel insurance, accident and medical cover, and loss of luggage and other personal items.

## **10. Residential visits**

The headteacher, together with the governing board, will approve all residential trips longer than 24 hours.

- 10.1 The planning and preparation laid out in this policy will apply to residential visits as well as 1-day visits. In addition, the trip lead will make sure:
- Staff have received any necessary training
  - All necessary permissions and medical forms are obtained at least 1 month before the start of the trip
  - All adults, including volunteers, have had adequate safeguarding checks. Where appropriate – e.g. if the volunteer will be in direct unsupervised contact with pupils – this will include relevant DBS checks
  - The trip lead must ensure that safeguarding arrangements for residential visits are clearly planned and communicated. This includes arrangements for accommodation, rooming, supervision, staff and pupil boundaries, overnight checks, use of mobile phones and devices, photography, medication, intimate or personal care where relevant, reporting concerns, low-level concerns or allegations, and contact with the DSL or Base

Contact. Staff must follow the School's Safeguarding Policy and Staff Code of Conduct throughout the visit.

10.2 Parents and carers will be given information about the visit and asked for permission at least 2 months before the first day of the visit. Information shared with parents will include:

- The dates and time of departure and return to school
- The full address and contact details of the destination
- Planned activities and options
- Meal provision
- Costs and optional charges, including deposits and the date by which this must be received, in line with our charging and remissions policy (this will include information about exemptions)
- Clothing and equipment provided, and what pupils must bring themselves
- Public health requirements, including any required vaccinations
- Accommodation options and arrangements
- The names of staff attending

10.3 For visits abroad, the School will follow FCDO foreign travel advice before and during the visit. The trip lead and EVC will ensure that overseas visits include appropriate checks on passport validity, visa or entry requirements, insurance, medical cover, vaccinations or public health requirements, emergency contacts, accommodation, transport, provider safety, safeguarding arrangements and communication plans.

Where external travel providers are used, the School will check relevant financial protection, such as ATOL or ABTA where applicable, public liability insurance and emergency support arrangements. Where adventurous activities are included, the School will check relevant local accreditation, provider competence and safety standards.

Pupils may be asked to provide passport information and GHIC/EHIC information where relevant and available.

## **11. Review**

This policy will be reviewed every two years by the school's EVC. At every review, the policy will be shared with the Executive Team.

## **12. Links with other policies**

This policy links with the following policies and procedures:

- Health and safety policy

- Charging and remissions policy
- Behaviour policy
- Child protection policy
- First aid policy
- Supporting pupils with medical conditions policy
- Special educational needs (SEN) policy
- Equality, Diversity and Inclusion policy
- Accessibility plan
- Early Years Foundation Stage (EYFS) policy

## Appendix 1: proposed visit planning steps

Please follow the steps below if you would like to add a trip to the school calendar.

- Day trips should be added to the calendar at least the term before it is due to happen
- Residential trips should be added to the calendar at the start of the academic year
- Overseas residential trip should be added to the calendar at least by the previous academic year. Overseas trips need to be approved by the EXEC team in addition to EVC/Head approval.

The EVC and SMT reserve the right to refuse any trips that are planned outside of this time frame, please discuss with the EVC (Jen Angwin).

### 1. Initial Proposal

Staff member submits initial trip idea to line manager and/or EVC. Includes: objectives, proposed dates, venue, year group(s), estimated cost. Proposed new residential trips need to be formally presented to the Exec Team. Trips required as part of the curriculum (e.g. field trips, visits to sites of Geographical interest etc) must be planned by the HoD by the start of the academic year and placed in the calendar to allow consideration of clashes.

### 2. Preliminary Approval

EVC gives in-principle approval. Checks for calendar clashes, educational value, cost to parents and value for money, impact on other academic subjects.

### 3. Risk Assessment Drafted

Visit leader drafts trip-specific risk assessment. Generic risk assessments are available in SharePoint > MTS Cross Schools > 1.Operational > EVOLVE > Trip Risk Assessments. Liaise with venue for provider for their risk assessments and insurance.

### 4. Visit Form Completed & EVC Reviews

Visit leader completes Educational Visit Form. Includes staffing, itinerary, safeguarding, costs. EVC reviews documentation and gives outline approval. Once approved, trip is added to SOCS by staff member.

### 5. Publish Trip Details & Request Interest (EVC Booking Meeting)

Information letter to parents is drafted, checked by EVC, and sent to parents with an Expression of Interest request. EOI responses are sent to Finance. If oversubscribed, places are allocated randomly, witnessed by SMT.

## 6. Complete Trip Form (EVC Planning Meeting)

Complete consent forms, payment schedule and send out payment requests. Complete Evolve form and arrange safeguarding briefing with DSL.

## 7. EVC Approval (EVC Sign-Off Meeting)

EVC reviews trip form, risk assessment, and financial viability. EVC sign-off given. Trip leader shares Trip pack with accompanying staff. Trip lead and accompanying staff complete Microsoft Form to register that they have read, agree to and understand their responsibilities as stated in the risk assessment. For residential trips, EVC shares a trip log with all accompanying staff to document any incidents or communications sent during the trip.

## 8. Final Preparation

Confirm bookings, staff briefing, safeguarding checks. Share medical info, risk assessment, emergency contacts. Parent information evening if required. Request Trip phone, organize first aid kits.

## 9. Trip Goes Ahead

Trip takes place. Carry all documentation. Trip lead has paper pack, all other staff accompanying the trip have access to the digital trips pack, held in the school's secure cloud. Follow safeguarding protocols. Debrief and log any incidents.

## 10. Evaluation meeting with EVC

Post trip, Trip lead debriefs with EVC. Any Accidents or Near Misses are logged. Recurring trips are added onto next year's calendar (or in the next five years for international trips).

## Appendix 2: risk assessment template

Generic Risk Assessment templates are available in the School's sharepoint, and are signposted in the Evolve system. These include generic risk assessments for travel, off-site activities and on-site activities.

Staff who are planning a trip may use these as a starting point, but must edit, personalise and make the RA specific to that particular trip, even if the same trip has run previously. Columns f,g and h, ad if necessary k.l and m must be colour coded depending on the score given for the likelihood and impact level.

All members of staff who are on the trip must read, agree to and sign that they understand their role in implementing the control measures put in place for each trip.

**A Hazard is anything that may cause harm, e.g. working at height on a ladder.**  
**Risk is the chance that someone or something could be harmed by the hazard, measured by combining (multiplying) the likelihood of it happening with its probability (severity). For example, there may be a possible (likelihood) that someone that is not competent could fall from a ladder (3 rating – see right) combined with a 'moderate' impact of multiple injuries (2 rating), which creates a score of 6 (low risk). However, the risk should be reduced to as low as reasonably practicable (ALARP) through the implementation of control measures, such as ensuring that only trained people climb the ladder.**

Likelihood (L)	Impact (I)
1 – Remote / Rare	1 – Minor
2 – Unlikely	2 – Moderate
3 – Possible	3 – Major
4 – Probable	4 – Severe
5 – Highly Probable (Almost Certain)	5 – Critical

Note: impact number is unlikely to change with control measures

Risk Score Calculation					
	1	2	3	4	5
IMPACT	5	5	10	15	25
	4	4	8	12	16
	3	3	6	9	12
	2	2	4	6	8
	1	1	2	3	4
LIKELIHOOD					

5 Step Process
Step 1 – Identify the hazards
Step 2 – Decide who might be harmed and how
Step 3 – Evaluate the risks and decide on precautions (control measures)
Step 4 – Record your significant findings and implement control measures
Step 5 – Review your risk assessment and update as necessary

Location:		Assessor:
Activity / Exercise:		Assessor's signature:
Generic or Specific Risk Assessment:	GENERIC – please use sections in your own personalised and amend and add in any additional considerations	Assessment Date:
		Review Date:

NOTES

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(l)	(m)	(n)
Ref	Activity / Exercise / Process (Step 1a)	Hazards identified (Step 1b)	Who or what might be harmed and how, e.g. Staff / Pupils - injury Visitor - injury Contractors - injury General public - injury Environment - spill / release of chemicals (Step 2)	Existing control measures (Step 3a)	Assessment with existing controls L (1 to 5) (Step 3b) I (1 to 5) (Step 3c) Score (L x I) (Step 3d)	Is residual risk acceptable in the context of risk appetite for the activity? (Yes / No) – Refer to Risk Score Calculation above. If Yes, move to column (n). If No, identify additional controls (Step 3e)	Reasonable additional controls that can be implemented to reduce risk to ALARP (Step 3f)	Reassessment with additional control measures L (1 to 5) (Step 3g) I (1 to 5) (Step 3h) Score (L x I) (Step 3i)	List required action(s) to investigate controls (Step 3j)	Definition	Definition (Health Safety and Environment)	2 Moderate	1 Minor

**Step 5 - Review the generic risk assessment and update if necessary - All generic risk assessments should be regularly reviewed at a frequency proportional to the risk prior to any controls being proposed. In practice generic risk assessments should be reviewed at least annually, or more frequently:**

- where required by local instructions / procedures;
- if the safe execution of the activity relies on stringent supervision and/or adherence to a safety system of work;
- if there is reason to doubt the effectiveness of the assessment;
- following an accident or near miss;
- following significant changes to the task, process, procedure, equipment, personnel or management;
- following the introduction of more vulnerable personnel (e.g. persons under 18 or pregnant persons).

Risk Management		
Risk Rating	Authorisation	How Risk should be managed
1-3 (Very Low)	None	Review periodically to ensure conditions have not changed and working within ALARP and risk appetite.
4-9 (Low)	Line / Department Manager	Good risk mitigations to ensure that the impact remains ALARP and tolerable. Re-assess frequently to ensure conditions remain the same.
10-14 (Medium)	Line / Departmental Manager / HOD	Requires active management – review of desired outcome with additional resources or change to output requirements.
15-19** (Medium to High)	HOD / Senior Deputy Head / Directors	Contingency plans may suffice together with limited risk mitigations to achieve risk ALARP and tolerable.
20** (High)	Exec Head / Exec Team	Operational capability where the required outcome impacts on the School's operational capabilities.
25** (Very High)	Executive Head / Governors	Operational capability where the required outcome impacts on the School's operational capabilities.

\*\* Any risk with a rating score of 14+ once additional control measures have been implemented, must NOT proceed without prior approval from the named approvers above. Failure to seek the appropriate approvals may lead to formal investigation of the individual/s ignoring the findings of the risk assessment.

### Appendix 3: volunteer behaviour and code of conduct

This code of conduct sets out the expected behaviour for volunteers attending school trips. Volunteers should read and sign this form, showing that they understand and agree to follow this code while acting on behalf of the school. If you feel you cannot agree with this code, please speak to Thomas Robinson or Jennifer Angwin at the earliest opportunity and withdraw from the trip.

A copy of this form will be kept in the school office, and you may ask for a photocopy to keep for yourself.

Volunteers agree to:

- Remain professional and respectful with staff and pupils at all times
- Listen to and act on instructions from staff
- Dress appropriately for the trip
- Arrive at the agreed time and remain until the trip is concluded and they are told they may leave by staff
- Pay attention to potential dangers and raise concerns with staff
- Act responsibly and demonstrate good behaviour to pupils
- Report any concerns about the safety or wellbeing of a pupil to staff as soon as possible

Volunteers agree **not** to:

- Exchange contact details with pupils unless told to by a member of staff
- Engage in physical contact with pupils unless appropriate or required
- Share inappropriate personal information (i.e. personal beliefs, religious views, relationship status)
- Use demeaning, offensive, abusive or insensitive language
- Smoke, drink alcohol, or use drugs (other than those required for medical reasons) or be under the influence of alcohol or drugs (other than those required for medical reasons) for the duration of the visit
- Allow themselves to be left alone with a pupil unless previously agreed with staff
- Take photographs or record pupils without the permission of pupils and staff

As a volunteer, I have read and agree to this code of conduct, and will follow the rules set out above.

**Signed:**

**Date:**

#### **Appendix 4 - Procedure for oversubscribed trips**

When a trip is expected to be oversubscribed, the school will use a fair and transparent process to allocate places. Parents will receive outline details of the visit, including the location, dates and expected cost, and will be given a minimum of 72 hours in which to express interest.

Where oversubscription occurs:

- A4.1 Priority will be given to pupils who previously applied for the same trip but were unsuccessful, or who were unsuccessful in securing a place on a comparable trip in an earlier cycle. A list of comparable trips that will be considered would be communicated at the time of
- A4.2 Remaining places will be allocated through a random selection process, witnessed by two members of the Senior Leadership Team to ensure fairness and transparency.
- A4.3 For certain trips, a specified number of places may be reserved by gender, year group, or for pupils who take a particular academic subject or are part of a relevant co-curricular group (e.g., choir, sports team, CCF). Any such criteria will be clearly communicated to parents at the point of expressing interest.
- A4.4 Places will be secured only on receipt of the initial deposit by the stated deadline. If the deposit is not paid on time, the place will be offered to the next pupil on the waiting list.

This process ensures equitable access to high-quality educational visits while maintaining clarity for families and staff.