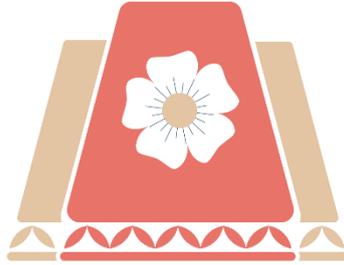




Rugeley  
John Taylor  
School

# RUGELEY JOHN TAYLOR SCHOOL



## Educational Visits Procedure

Partner school

John Taylor Multi Academy Trust



**Reviewed by Governing Body:** TBC

**Adopted:** September 2025

**Next Review:** September 2027

## Version Control

Version	Author	Date	Changes made
1.0	HB	05.06.2025	First Edition
1.1	HB	08.10.2025	Local visits map added to Appendix 1 Appendix 2 added – Educational Visits Approval Form Updated hyperlinks
1.2	HB	25.02.2026	Local Area Visits Map updated to include all JTMAT schools

This procedure is to be read in conjunction with the JTMAT Management Arrangements for Educational Visits [Educational-Visits-LOtC-2025-final.pdf](#)

It is important that the procedure outlined in the visit procedure is followed. All educational visits and trips must have approval from the Executive Headteacher.

The very first step in the process is for the trip leader to complete an ‘Educational Visit Request Form’ to accurately cost the trip (subject to the trip’s categorisation), and provide key information to assist in understanding staff requirements and calendar arrangements. The next important step is to speak to the Business and Operations Manager to discuss visit/trip finance and administration. This should be done at least six months in advance for non-residential visits/trips and for residential visits/trips, 18 months where possible.

A draft letter to parents/carers to accurately cost and confirm arrangements for the proposed visit/trip should be agreed with the Business and Operations Manager. Both the draft letter and completed trip form should be reviewed and approved by the Executive Headteacher. Upon approval, the agreed form and letter should then be handed to the Education Visits Coordinator alongside a request for cover for each member of staff going on the trip to record in the cover diary. A copy of the form and letter is also shared with the PA to Executive Headteacher, Attendance Officer and kitchen team for their ongoing actions to be completed, to support the trip arrangements.

The Business and Operations Manager is provided with a copy of the final letter for the payment account to be set up for each parent/carers. **Any unforeseen costs may have to be funded from a Department’s capitation budget.**

When making staffing arrangements, it is important to speak to the Business and Operations Manager about the potential use of casual staff to help supervise educational visits/trips. Casual staff are paid hourly and must be included in the cost of the educational visit/trip. For foreign visits, the rate is daily. The level of remuneration should be made clear to any potential trip helpers, and any queries resolved, prior to the trip being staffed.

Letters are sent to parents/carers via BROMCOM with a deadline for return of permission slip/initial payment. Places are not to be given on a “first come first served” basis. Once the deadline has elapsed, it is important that names of students interested in going on the visit/trip should be reviewed by the visit/trip leader who can then assess if there are any concerns regarding the behaviour/attendance of specific students and their potential attendance on the visit/trip.

In the event of over-subscription, names can then be drawn out of a hat by the Visit/Trip Leader in the presence of the Educational Visits Coordinator (EVC) or other member of Senior Leadership Team. Students are then informed that they have been successful or otherwise; the Trip Leader keeps a list of all students who are unsuccessful in gaining a place. They are given priority to be selected on the next available visit/trip that they express an interest in and are eligible to attend.

Disadvantaged students and those in receipt of Post-16 bursaries should be supported financially to ensure their participation in Category 1 and 2 educational visits. There may be scope to extend this to

other categories (on a case-by-case basis), and other forms of support may also be considered. We would look to ensure that disadvantaged students are represented on the trip in proportion to the % of disadvantaged within their year group.

## **EVOLVE**

Once initial approval has been given, the online EVOLVE form must then be completed for every trip by the Trip leader. This can be accessed via <https://evolve.edufocus.co.uk/>

If you go into the resources section under establishment documents you will find some extremely useful guidance documents, especially the Trips Procedure flow chart and the supplementary guidance on educational visits documents.

When the Evolve form asks if the place where you are going has public liability insurance, you do need to check this, and it should be at least £5,000,000 of cover. The form asks if you use County insurance, the answer is 'No.' Our insurance is provided under the government Risk Protection Arrangements (RPA) number 151701.

The Trip Leader is responsible for completing a risk assessment for the trip, and again risk assessment templates are available within the resources section in Evolve. If you are unsure about this, please speak to the Educational Visits Co-Ordinator.

The Educational Visits Co-ordinator is the named Emergency contact for all trips and visits and can be contacted via the school Reception on 01889 743800 or through a dedicated school mobile or personal mobile number.

On occasions the named Educational Visits Co-Ordinator may not be available to be Emergency Contact in which case they will advise another member of the Senior Leadership Team who can act as the Emergency Contact if required.

## **Adventurous Activities**

The "Adventurous Activity Provider forms (EVC1)" form must be completed by the providers of any activities that involve an element of risk (e.g., Rock climbing). Essentially, this will involve sending an electronic copy of the form to them to complete and return. An "Adventurous Activity Provider forms (EVC1)" does not need to be completed if the provider has "Learning Outside the Classroom Certification (LOtC).

If you need clarification as to whether an activity requires an "Activity Providers Checklist" to be completed, contact the school EVC. The Adventurous Activity Provider forms (EVC1)" form will need to be attached onto Evolve.

Educational visits that are classed as "Adventurous Activities" will need approval from Staffordshire County Council. Evolve for these activities must be submitted at least one month before the date of the planned activity.

Adventurous Activities include but are not limited to:

- Climbing – for example rock climbing, abseiling, ice climbing, gorge walking, ghyll scrambling, sea level traversing, high and low-level ropes courses.
- Water sports – for example canoeing, kayaking, dragon boating, wave skiing, white-water rafting, improvised rafting, sailing, sailboarding, windsurfing, surfing, including board, body board and skim board
- Boating – all forms excluding commercial transport

- Kite surfing and buggying
- Snorkelling and aqualung diving
- Swimming all forms excluding UK Public Pools
- Paddlesport activities, including stand up paddleboarding
- Coastering/Coast Scrambling/ Sea Level Traverse
- Duke of Edinburgh Award Expeditions and training (including walking, cycling, canoeing and horseriding)
- High level ropes Course and Zip Lines
- Trampolining and inflatable parks
- Fieldwork in coastal, river and upland locations
- Hill walking and mountaineering
- Underground exploration
- Caving – for example caving, potholing, mine exploitation
- Use of powered safety craft
- Horse riding and equine care
- Trekking – for example hill-walking, mountaineering, fell-running, orienteering, pony trekking, off road cycling/mountain biking, off-piste skiing.
- Open country – all activities (beyond 30 minutes of nearest refuge and above 500m)
- Shooting including air, clay, laser tag sports, paintball and airsoft
- Skiing and winter sports, including skiing indoor ad dry slope, snowboarding, tubing and sledging
- Armed Service Providers
- Air activities (Excluding commercial flying)
- Challenges and skills – for example archery, field, clout and other target sports, quad biking, assault courses, mountain boarding, initiative exercises, BMX and Skate Parks, Knife and axe throwing
- Motorsport, all forms including Karting
- Camping
- Adventure parks, Assault and Challenge courses
- Multi Activities (including those delivered by external providers)
- Any other activity which has additional risks

## Local Area Visits

All Local area visits (LAV) must be recorded on Evolve via the “Local Area Visit” module.

Local area visits do not require parental consent, but parents are to be informed in advance, via one of the school’s usual communication methods, e.g., phone calls, text, email, and paper slip sent home with students.

Local area visits that do not include residential or adventurous activities do not normally need any additional risk assessment (other than following the operating procedure below).

Any visit that requires an additional risk assessment should be entered into the full Evolve system, rather than the LAV module (please liaise with our EVC if unsure).

LAV Boundaries (**see Appendix 1**)

The boundaries of the local learning area are shown on the map in Appendix 1. This area includes, but is not limited to, the following frequently used venues:

- All JTMAT Schools
- Stafford
- Cheslyn Hay (PE Fixtures)
- Lichfield Garrick
- Lichfield Cathedral

- Cannock and District PE Association (school's fixtures)
- Local Sporting fixtures – including swimming in swimming pool

### **Transport to the Local Learning Area**

The method of transport in these areas will be limited hired or loaned minibuses being driven by MIDAS qualified staff, walking, cycling, and local taxis.

The following are potentially significant issues/hazards within our Local Learning Area:

- Road traffic
- Other people / members of the public / animals.
- Losing a student
- Uneven surfaces and slips, trips, and falls
- Weather conditions
- Activity specific issues when doing fieldwork (Nettles, brambles, rubbish, etc.)

These are managed by a combination of the following:

- The Executive Headteacher, Deputy or EVC must give verbal approval before a group leaves.
- Only staff judged competent to supervise groups in the environment are approved.
- Parents have access to the Educational Visits Policy.
- There will normally be a minimum of two adults, except for sporting fixtures or for small groups where one adult is deemed appropriate, unless travelling in school minibus, where two adults required, as a minimum.
- Staff are familiar with the area and have appropriate experience or group management techniques.
- Students have been trained and have practiced standard techniques for road crossings in a group.
- Where appropriate, students are fully briefed on what to do if they become separated from the group.
- All remotely supervised work in the Local Learning Area is done in "buddy" pairs as a minimum.
- Students' clothing and footwear is checked for appropriateness prior to leaving school.
- Staff are aware of any relevant student medical information and ensure that any required medication is available.
- Staff will either record the activity on Evolve within the Local Area Visits or if this is not available, they will have completed a signing out sheet with Reception.
- A mobile phone is taken with each group and the number retained by Reception.
- Appropriate personal protective equipment is taken when needed (e.g., gloves)

### **Residential Activities**

Planning an educational visit that is residential then an "Accommodation Providers Assessment form (EVC2)" must be completed and attached onto your Evolve application. If the provider, you are using has LoTC then they do not have to complete an "Accommodation Providers Assessment form (EVC2)".

If an Accommodation Providers Assessment form (EVC2)" needs to be completed, then the educational visit leader will need to send the form to the provider for them to complete.

Although approval is delegated, establishments MUST additionally notify Entrust's Educational Visits Advisor (EVA) in advance of any higher-risk visits and activities planned (preferably before booking) which involve any of the following:

“Activity Providers Checklist” and Accommodation Providers Assessment form (EVC2)” forms can be downloaded from the visit forms section of the resource area on Evolve. When Evolve has been completed press submit and the system will then request the EVC to check and send on for final / further approval.

If you are working on Evolve it will automatically save a draft copy. If you have any queries whilst you are in the draft stage, please contact the EVC for assistance.

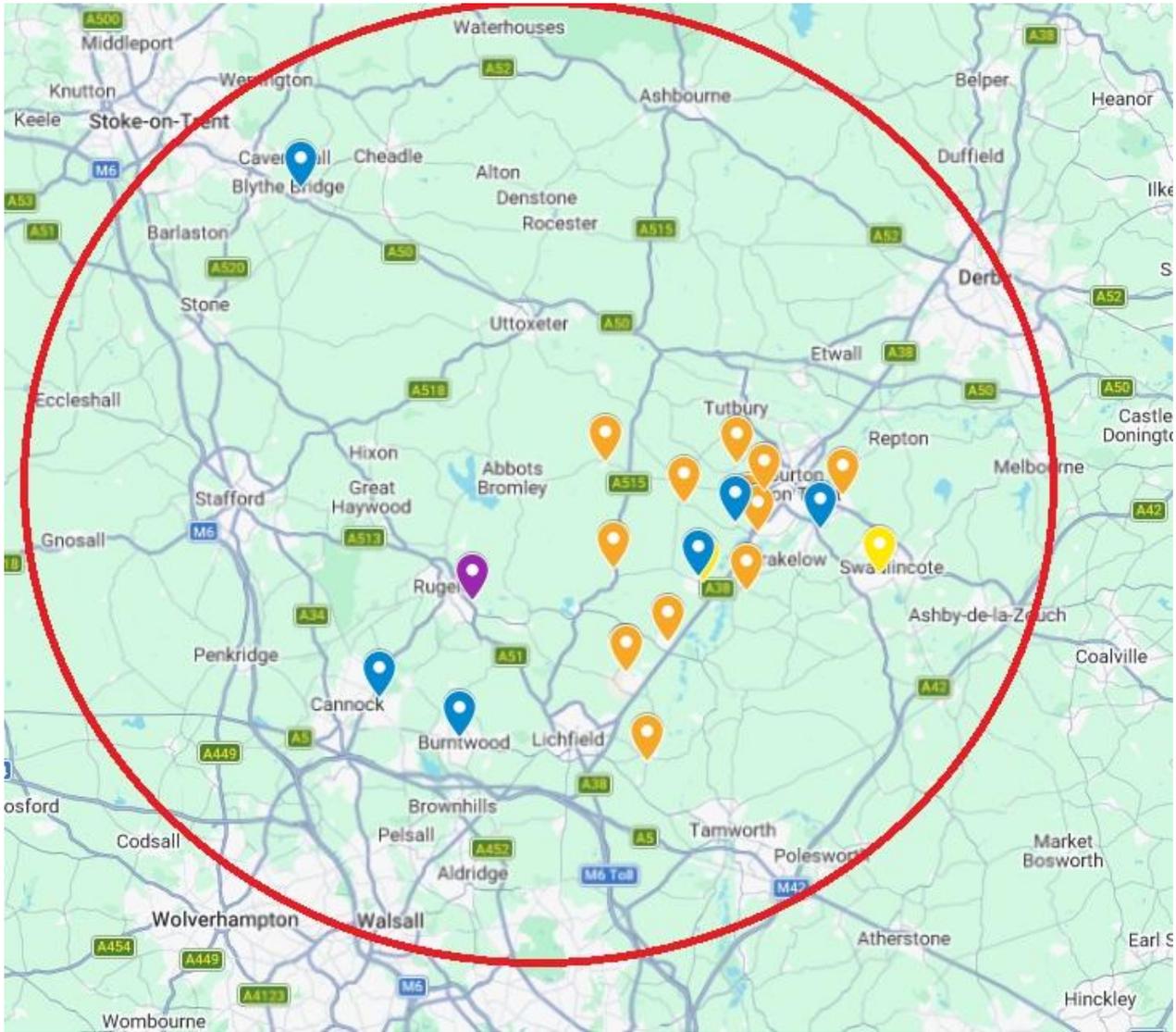
When the educational visit has been given final approval, you will receive an email confirming it has been approved. If you have not received this, contact the EVC who can chase this up.

**If in any doubt whatsoever about how to proceed with any of the above guidelines and procedures, consult the EVC before taking any further action.**

**MOST IMPORTANT - It is recognised that occasionally an opportunity arises to take students on a trip with very little notice – this does not mean you cannot go. Please talk to the EVC or the Headteacher.**

This policy should be read in conjunction with our Equality policy and Safeguarding policy which seeks to promote equality of opportunity and good relations across all aspects of school life.

Appendix 1



## Appendix 2 EVO Form

### Educational Visits and School Trips - Request for Executive Headteacher approval in principle.

Use this form to seek provisional approval for the off-site visit to take place **at least 4 working weeks** before the visit is due to take place.

Once this form has been signed by the Executive Headteacher, please start to record the details of your visit to the EVOLVE System.

If you need assistance with this process, please ask Business and Operations Manager - Education Visits Coordinator (EVC).

For overseas and residential visits to be approved by the Local Authority - EVOLVE documentation must be submitted **at least 6 working weeks** before the visit will take place.

Name of Visit Leader:	
<b>Where?</b> Destination, please include all stop off points enroute.	
<b>What?</b> What is the activity? What hazards/risks will need to be managed?	
<b>When?</b> Is there a set date, is there a range of optional dates, is it a seasonal activity? Are there multiple events on different dates?	
<b>Why?</b> What is the educational aim or outcome that it supports?	
<b>Who?</b> Who will go on the trip, how many students will be involved and which Year groups, <b>which staff</b> , other adults, young people?	Please <b>name</b> the staff you plan to ask to go. Have they got school commitments? Have you calculated this cost/Supply cover costs?

**Visit Leaders** should tick any of the boxes below that are applicable, agree a target date for Evolve form submission and sign to confirm the statement below.

Adventurous activity                       Overseas or residential visit                       Joint visit with another school

**As visit leader I understand the extent of my responsibility under the school Educational Visits policy.**

Target Date for Evolve form to be submitted: \_\_\_\_\_ N/A \_\_\_\_\_

Name of Leader: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**How will this be funded?** (Tick one box)

School Funded -the total cost for this trip is expected to be £ \_\_\_\_\_

All or part home funded – Contribution amount anticipated £ \_\_\_\_\_ per student.

To be determined – Please add explanation for this. \_\_\_\_\_

Executive Headteacher Approval: Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Hand to EVC once signed by Executive Headteacher.**

[Free School Trips & Bursary Places \(planmyschooltrip.co.uk\)](http://planmyschooltrip.co.uk)

How to cost the trip – read the Charging and Remission Policy

Complete a Trip Cost Calculator

## Guidance for Visit Leaders

Contrary to popular belief, for the majority of trips the process of planning a safe visit and managing the impact of staff and students being out of school is a relatively simple process. For a low-risk activity, involving students and staff from Paulet who are travelling to and from a venue in mainland Britain on the same day the only approval necessary is that of the Headteacher.

For more complex visits, others may also have to approve the trip prior to travel and extra time should be allowed when planning to take account of this.

For visits involving students from another school, the Headteacher of that other school also needs to approve the visit.

For overseas trips, trips that include overnight stays and trips that include adventurous activities, the Local Authority must also approve the visit.

**Remember, if you commit some of your budget before you have gained approval, you may lose some or all your money if the trip is not approved.**

The following step by step guidance is provided to help visit leaders to plan and conduct successful educational visits. Further advice for visit leaders is available from your line manager, the school Educational Visits Coordinator, the Headteacher and by referencing National Guidance from the Outdoor Education Advisors Panel which is available online at [oeapng.info](http://oeapng.info)

- 1) Get approval in principle of the visit and the staffing you need.
  - EVO form and draft parental letter to the Executive Headteacher
- 2) Pass copy of the approved **EVO** to the School Business Manager.
- 3) Do detailed planning and record in the EVOLVE system (including the **EVO** and letter from step 1) **before** submitting for final approval.
- 4) Submit it for approval and then order your transport, tickets etc. **once approved**. Please speak to School Business and Operations Manager for approved suppliers, including transport, etc.

**Step 1.** Get Executive Headteacher's approval in principle for the planned visit.

**How:** Complete the EVO form and draft your letter to parents. We have created the EVO form to capture the information needed for approval. You should also include a draft of your letter to parents with the EVO form for approval. A template letter that you can edit to fit your particular visit is available in the 'Establishment Documents' section of the EVOLVE system.

**When:**

- At least 4 weeks before you plan to travel, but the sooner the better; and
- before you spend your budget; and
- before you write to parents; and
- Also, for visits that need approval of the Entrust, remember you need to submit the EVOLVE record at least 6 weeks before you intend to travel, so allow for this in your planning.

**Step 2:**

Pass copy of the approved EVO and your draft letter to parents to Business and Operations Manager who is also the Educational Visits Coordinator (EVC).

**How:**

Email or pass paper copies of the approved EVO form and your draft letter to parents to the EVC.

At this point, the EVC will be able to assist you in planning the risk management and financial aspects of your visit. It pays to think about these things well in advance.

### **Step 3:**

Complete your detailed planning and record the details of the visit to the EVOLVE system:

[www.entrust-ed.co.uk/evolve-system](http://www.entrust-ed.co.uk/evolve-system)

#### **How:**

- Refer to the trust Educational visits/trips [Educational-Visits-LOtC-2025-final.pdf](#)
- Refer to the National Guidance (see web address above or use the link inside the EVOLVE system).
- If you need help with the budgeting or financial planning of your visit, please ask the School Business Manager.
- Complete risk assessments guidance can be found in the OEAP National Guidance section under Resources section, Guidance, Policies and Documents (Pink logo) on EVOLVE

### **Step 4:**

Submit your visit for approval in EVOLVE.

In all cases the EVOLVE record will be sent to the school Education Visits Coordinator who will check it and confirm that the planning and risk management has been checked and approved according to the current Off-Site Activities guidance document (the National Guidance).

It is then passed to the Executive Headteacher for final approval within school. Further approvals are automatically sought if the visit requires them.