

**WESTONBIRT SCHOOL****Educational Visits and Trips Policy**

Including safety and supervision on school journeys, boarding trips and weekend activities

|                                     |                                                                                                                                                                                                              |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Policy owner</b>                 | Assistant Head Co-Curricular / Educational Visits Coordinator (EVC)                                                                                                                                          |
| <b>Applies to</b>                   | Westonbirt School, including Senior School, Prep School, EYFS where applicable, boarding provision, co-curricular activities and all off-site visits.                                                        |
| <b>Reviewed</b>                     | September 2026                                                                                                                                                                                               |
| <b>Next review</b>                  | September 2027, or earlier following material change to legislation, statutory guidance, OEAP National Guidance or school arrangements.                                                                      |
| <b>Approval</b>                     | Head / appropriate governing or proprietor authority                                                                                                                                                         |
| <b>Operational system</b>           | EVOLVE                                                                                                                                                                                                       |
| <b>Related boarding requirement</b> | National Minimum Standards for Boarding Schools: safety and supervision on school journeys; activities and free time; staffing and supervision; required risk-assessment and off-site accommodation records. |

**September 2026 review - summary of substantive changes**

| Area                    | September 2026 change                                                                                                                                                                                             | Rationale / assurance                                                                 |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| Scope and boarding      | Made explicit that the policy applies to boarding house outings, evening and weekend activities, boarder transport and all school-arranged journeys off site.                                                     | Updated for current school practice, safeguarding, boarding and regulatory assurance. |
| Boarding trip procedure | Added a proportionate route for routine, low-risk boarding outings, while retaining full EVOLVE approval for higher-risk, unfamiliar, residential, adventurous and overseas activities.                           | Updated for current school practice, safeguarding, boarding and regulatory assurance. |
| Safety and supervision  | Strengthened effective-supervision requirements, pupil accountability, handover, remote/indirect supervision and arrangements for boarding and Sixth Form independence.                                           | Updated for current school practice, safeguarding, boarding and regulatory assurance. |
| Safeguarding            | Added a specific safeguarding planning section covering child-on-child concerns, SEND, existing safeguarding plans, overnight accommodation, rooming, missing pupils, disclosures and individual risk assessment. | Updated for current school practice, safeguarding, boarding and regulatory assurance. |
| Risk assessment         | Clarified proportionality, generic versus event-specific assessment, dynamic risk assessment and Plan B requirements.                                                                                             | Updated for current school practice, safeguarding, boarding and regulatory assurance. |
| Transport and records   | Strengthened transport assurance and specified the journey/transport records expected for inspection and boarding compliance.                                                                                     | Updated for current school practice, safeguarding, boarding and regulatory assurance. |
| Vetting and DBS         | Removed outdated 'frequent/intensive' wording and aligned the policy to KCSIE 2026 and the removal of the regulated-activity supervision exemption from 1 September 2026.                                         | Updated for current school practice, safeguarding, boarding and regulatory assurance. |
| Alcohol and substances  | Aligned pupil and staff expectations with the School's Smoking, Vaping, Alcohol and Misuse of Substances Policy and Staff Code of Conduct.                                                                        | Updated for current school practice, safeguarding, boarding and regulatory assurance. |

| Area                              | September 2026 change                                                                                                                                | Rationale / assurance                                                                 |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| Overseas visits                   | Updated FCO references to current FCDO travel advice and removed obsolete EU-transition wording.                                                     | Updated for current school practice, safeguarding, boarding and regulatory assurance. |
| Emergency arrangements            | Strengthened home-base emergency-contact requirements, particularly for out-of-hours, residential and boarding visits.                               | Updated for current school practice, safeguarding, boarding and regulatory assurance. |
| External providers                | Retained LOtC/AALA/provider assurance framework and corrected copied/outdated school references.                                                     | Updated for current school practice, safeguarding, boarding and regulatory assurance. |
| Cross-references and presentation | Updated internal policy links and restructured the policy into numbered, hierarchical sections with tabbed sub-paragraphs and fully bordered tables. | Updated for current school practice, safeguarding, boarding and regulatory assurance. |

## 1. Purpose and principles

- 1.1 Educational visits, trips, fixtures, expeditions and activities away from the School are an important part of pupils' educational and personal development. They should extend learning, promote confidence, resilience, independence and responsibility, and provide appropriate challenge.
- 1.2 The School is committed to enabling such opportunities while ensuring that risks are identified and managed proportionately and that pupils are appropriately safeguarded and supervised.
- 1.3 The purpose of this policy is to establish clear arrangements for planning, approval, risk assessment, safeguarding, staffing, supervision, transport, emergency response, recording and review.
- 1.4 The School adopts current OEAP National Guidance and uses EVOLVE as its planning, notification, approval, monitoring and communication system for off-site activities.

## 2. Scope

- 2.1 This policy applies to any School-arranged activity that leaves the School grounds, whether curricular, co-curricular, pastoral, sporting, boarding-related or recreational, and whether it takes place during the school day, in the evening, at weekends or during school holidays.
- 2.2 For the avoidance of doubt, this includes:
  - curriculum visits, fieldwork, theatre, museum and cultural visits;
  - sports fixtures and tournaments away from School;
  - Duke of Edinburgh's Award and other expeditions;
  - residential, overseas and adventurous activities;
  - Sixth Form or other activities involving agreed indirect or remote supervision;
  - boarding house outings, weekend activities, evening activities and recreational trips off site;
  - transport arranged by the School in connection with any such visit or activity.
- 2.3 Routine activities within the School's defined Learning Area may be managed through established procedures where the EVC has approved those arrangements. Activities outside those arrangements must be recorded and approved through the appropriate EVOLVE route.
- 2.4 This policy should be read alongside the School's Safeguarding and Child Protection Policy, Pupil Supervision Policy, Behaviour and Discipline Policy, Countering Bullying Policy, Child-on-Child Sexual Violence and Harassment Policy, Smoking/Vaping/Alcohol/Substances Policy, First Aid and Medical policies, Missing Pupil procedures, Transport procedures and Supporting Boarders/boarding documentation.

## 3. Legal and guidance framework

- 3.1 The School has regard to applicable legislation and current guidance, including:
  - Department for Education, Health and Safety on Educational Visits;
  - Keeping Children Safe in Education 2026;
  - National Minimum Standards for Boarding Schools (May 2026), including the requirement for a policy on safety and supervision on school journeys and suitable risk assessments for boarders' activities;
  - current OEAP National Guidance;
  - Health and Safety at Work etc. Act 1974 and associated regulations;
  - Equality Act 2010 and the duty to make reasonable adjustments;
  - Adventure Activities Licensing requirements where applicable;
  - current Foreign, Commonwealth & Development Office (FCDO) travel advice for overseas visits.
- 3.2 References to external guidance in this policy mean the current version. The EVC should review material changes to guidance and update operational practice without waiting for the annual policy review where necessary.

## 4. Categories of visit and approval

- 4.1 Visits will be planned and approved proportionately to their complexity and risk.
- 4.2 Routine, low-risk visits may require only limited additional planning where they are covered by existing School procedures and generic risk controls.
- 4.3 Visits requiring fuller planning include those involving greater distance, unfamiliar environments, residential accommodation, overseas travel, adventurous activities, specialist providers, significant medical/SEND/safeguarding needs or other elevated risk.
- 4.4 Non-residential UK visits not involving adventurous activity are entered on EVOLVE by the Visit Leader and proceed through the School's established approval chain.
- 4.5 Overseas, residential and adventurous visits require EVC scrutiny and final approval by the Head, or a person formally delegated by the Head where appropriate.
- 4.6 No visit may proceed until the required approvals have been completed.

## 5. Scheduling and calendar approval

- 5.1 Proposed educational visits should be considered through the School's annual calendar-planning process before the academic year wherever practicable.
- 5.2 In considering timing, the School will take account of:
  - curricular relevance and educational value;
  - lessons missed by pupils and staff;
  - financial impact on families;
  - cover requirements;
  - other School events and staff availability;
  - the number and timing of other visits for the cohort;
  - boarding, transport and operational implications.
- 5.3 Visits arising during the year may be approved where they provide appropriate benefit and the necessary planning and staffing can be secured.
- 5.4 Overseas trips should normally be planned sufficiently far in advance to allow informed parental decision-making, provider assurance, financial planning, safeguarding review and travel documentation.

## 6. Roles and responsibilities

### 6.1 The Head

- ensures that the School has effective arrangements for educational visits and that an appropriately competent EVC is appointed;
- approves overseas, residential and adventurous visits and other visits referred for Head approval;
- ensures that visits are consistent with safeguarding, health and safety and School policy;
- ensures that sufficient staff remain on site to manage the School safely.

### 6.2 Educational Visits Coordinator (EVC)

- supports and challenges Visit Leaders through the planning and approval process;
- assesses Visit Leader competence and, where applicable, technical competence;
- ensures staff understand current guidance and School procedures;
- scrutinises risk management, supervision, emergency arrangements, providers and safeguarding considerations;
- ensures an appropriate emergency contact exists for each visit;
- monitors evaluations, incidents and near misses to inform future practice and training.

### 6.3 Visit Leader

- has overall responsibility for planning and the safe conduct of the visit;
- completes EVOLVE documentation and obtains required approval;
- undertakes proportionate risk assessment and records event-specific controls where required;
- ensures appropriate staffing, supervision, safeguarding, medical, first-aid, transport, communication and emergency arrangements;
- briefs staff, pupils and, where appropriate, parents;
- maintains pupil accountability throughout the visit;
- conducts dynamic risk assessment and modifies or stops the activity if circumstances require;
- reports incidents, near misses and lessons learned and completes post-visit evaluation.

### 6.4 Accompanying staff and adults

6.4.1 All accompanying adults must understand their role, the pupils for whom they have responsibility, the risk controls and emergency arrangements, and must act under the direction of the Visit Leader.

6.4.2 Pupil leaders or prefects may support organisation but must not be counted as the responsible supervising adult.

## 7. Staff competence, vetting and volunteers

- 7.1 Staff competence is central to safe visit management. The EVC will consider relevant experience, training, knowledge of the pupils and activity, judgement, leadership and ability to manage emergencies.
- 7.2 Where specialist or adventurous activities are led by School staff, the EVC must be satisfied that the individual holds the appropriate qualification, approval or verified statement of competence required by current National Guidance or the relevant governing body.
- 7.3 Vetting and DBS requirements for staff, volunteers and other adults must be determined in accordance with KCSIE 2026, the School's Safer Recruitment arrangements and the statutory regulated-activity framework in force from 1 September 2026.
- 7.4 The removal of the regulated-activity supervision exemption from 1 September 2026 must be considered when using volunteers or other adults who teach, train, instruct, care for or supervise children often enough or overnight.
- 7.5 No assumption should be made that the presence of a member of School staff removes the need to consider the vetting status or suitability of another adult.

## 8. Staffing and effective supervision

- 8.1 Every visit must have an effective level of supervision approved through the School's arrangements. There is no single universal staffing ratio suitable for all visits.
- 8.2 The Visit Leader and EVC must make a professional judgement taking account of:
  - type, level and duration of the activity;
  - age, maturity, behaviour, SEND, medical and safeguarding needs of pupils;
  - experience and competence of staff and other adults;
  - venue, environment, time of day/year and predicted conditions;
  - transport and transition points;
  - residential or overnight arrangements;
  - contingency and emergency arrangements, including staff illness;
  - whether individual staff are allocated solely to support a particular pupil.
- 8.3 A member of staff allocated specifically to meet the individual needs of one pupil should not normally be counted as available for general group supervision unless the risk assessment establishes that this is appropriate.
- 8.4 A visit must not proceed where the Visit Leader or EVC is not satisfied that supervision is effective.

## 9. Direct, indirect and remote supervision

- 9.1 Pupils must be appropriately supervised throughout visits, although older or suitably prepared pupils may be unaccompanied for defined periods where indirect or remote supervision has been risk assessed and approved.
- 9.2 Any decision to permit indirect or remote supervision must take account of maturity, known behaviour and vulnerabilities, location, activity, preparation, staff competence, communication and emergency arrangements.
- 9.3 Where remote supervision is used, there must be a named Visit Leader and the arrangement must be recorded on EVOLVE.
- 9.4 The plan should state, as applicable:
  - geographical boundaries;
  - minimum group size;
  - rendezvous point and time;
  - communication arrangements;
  - recall system;
  - action if a pupil is late, lost or separated;
  - staff location and availability;
  - emergency procedure.

## 10. Boarding, weekend and evening activities

- 10.1 Boarding house outings, weekend activities and evening activities away from the School site fall within this policy and within the School's arrangements for safety and supervision on school journeys.
- 10.2 The level of planning must be proportionate. Routine, familiar and low-risk boarding outings may operate under an EVC-approved generic framework rather than requiring a full new risk assessment on every occasion.
- 10.3 For a routine boarding outing, the responsible member of staff must ensure that the following are recorded before departure:
  - activity and destination;
  - date, departure time and expected return time;
  - names of participating pupils and responsible staff;
  - transport arrangements;
  - relevant medical, SEND, behavioural or safeguarding information;
  - staff/pupil communication arrangements;
  - emergency contact and action if the group is delayed or plans change.
- 10.4 A full EVOLVE submission and event-specific planning are required where the boarding activity is unfamiliar, higher risk, residential, adventurous, overseas, uses a specialist provider, involves significant pupil needs, or otherwise falls outside the approved routine framework.
- 10.5 Where boarders are given independent time during an outing, the arrangements in Section 9 must be applied and recorded.
- 10.6 The boarding duty system must make clear who is responsible for pupils before departure, during the activity and on return, including any handover between visit staff and boarding staff.

## 11. Risk assessment and risk management

- 11.1 Risk management must be proportionate and sensible, focusing on genuine risks rather than preventing worthwhile educational challenge.
- 11.2 The Visit Leader must consider hazards arising from the activity, environment, pupils, staffing, transport, accommodation, providers and foreseeable emergencies.
- 11.3 Existing generic assessments may be used for routine activities where they remain valid. Event-specific risks and controls must be recorded where circumstances differ or additional risks exist.

- 11.4 The assessment must consider pupils with additional medical, SEND, behavioural or safeguarding needs and whether an individual risk assessment or support plan is required.
- 11.5 A suitable Plan B should be identified where foreseeable changes in weather, staffing, venue, transport or other conditions could make the planned activity unsuitable.
- 11.6 Dynamic risk assessment must continue throughout the visit. The Visit Leader has authority to modify, postpone or terminate an activity where safety or welfare requires it.

## 12. Safeguarding on visits

- 12.1 Safeguarding arrangements remain fully applicable when pupils are away from the School site. A visit is an extension of the School's safeguarding culture and procedures.
- 12.2 Before a visit, the Visit Leader must obtain relevant pupil information and consult the DSL/appropriate safeguarding lead where there are known concerns that could affect the visit.
- 12.3 Planning should consider, where relevant:
  - existing child-protection or safeguarding plans;
  - child-on-child abuse, bullying or harmful relationship concerns;
  - SEND, communication needs and reasonable adjustments;
  - mental health, self-harm or risk-taking concerns where known and relevant;
  - risk of going missing or exploitation;
  - online/contact risks and use of devices;
  - separated-family/contact restrictions;
  - intimate care, privacy, changing and washing arrangements;
  - rooming and overnight supervision;
  - transport or handover vulnerabilities.
- 12.4 Residential visits must have clear rooming and overnight arrangements that protect privacy and dignity, provide pupils with access to staff, avoid inappropriate adult access to pupil accommodation and allow prompt response to welfare concerns.
- 12.5 If a pupil makes a safeguarding disclosure during a visit, staff must respond in accordance with the Safeguarding and Child Protection Policy, record the concern promptly and contact the DSL/DDSL or emergency safeguarding route without unnecessary delay.
- 12.6 Safeguarding information shared with visit staff must be limited to what they need to know to safeguard the pupil and managed securely.

## 13. Medical needs and first aid

- 13.1 The Visit Leader must obtain current medical information and consult the Health and Wellbeing Centre or relevant medical lead as appropriate.
- 13.2 Medication arrangements, allergies, emergency medication, care plans and any staff training required must be confirmed before departure.
- 13.3 Every visit must have access to first-aid provision appropriate to the environment and activity. A suitable first-aid kit must be carried.
- 13.4 For EYFS outings, statutory paediatric first-aid requirements must be met.
- 13.5 Where access to emergency services may be delayed, a higher level of first-aid competence may be required.

## 14. Transport and school journeys

- 14.1 Transport must be suitable for the journey, pupils and activity and must be included within visit planning and risk assessment.
- 14.2 Where the School arranges transport, the Visit Leader must liaise with the Transport Manager or other designated operational lead and ensure that relevant assurance has been obtained.

14.3 The visit record should include, as applicable:

- transport provider and mode of transport;
- departure, collection and return arrangements;
- pupil/passenger list and responsible staff;
- driver/licence/insurance assurance where School or private vehicles are used;
- provider insurance and appropriate vehicle safety arrangements;
- seat-belt arrangements where applicable;
- emergency contact and contingency arrangements;
- arrangements for pupils with medical, SEND or safeguarding needs;
- handover arrangements, particularly for boarders and out-of-hours returns.

14.4 Where pupils use their own cars or lift-share as part of a School-arranged visit, the EVC must be consulted and appropriate parental permission and insurance/licensing considerations addressed.

14.5 When using transport overseas, the Visit Leader must assess whether local standards are suitable. Any material difference from standards reasonably expected in the UK must be considered in the risk assessment and communicated to parents where relevant.

14.6 School minibuses used abroad require specific approval and confirmation of insurance, driver entitlement and any country-specific requirements.

## 15. Residential accommodation

15.1 Accommodation must be assessed as suitable for the group, taking account of security, fire and emergency arrangements, rooming, staff access, pupil privacy, safeguarding, medical needs and supervision.

15.2 Where practicable, the Visit Leader should have prior knowledge of the accommodation or obtain sufficient reliable information to make an informed assessment.

15.3 Residential arrangements must identify:

- room allocation and pupil groupings;
- staff accommodation and overnight duty arrangements;
- how pupils contact staff at night;
- security, locking and emergency evacuation;
- toilets, showers and changing privacy;
- missing-pupil response;
- arrangements for illness or isolation;
- any swimming pool or other leisure facility risks.

## 16. Overseas visits

16.1 Overseas visits require additional planning, sufficient lead time and Head approval.

16.2 The Visit Leader must consult current FCDO travel advice and keep relevant advice under review up to and during the visit.

16.3 Planning must consider entry requirements, passports/visas, health advice, insurance, culture and local law, accommodation, transport, communications, emergency assistance, political/security conditions and any material difference in safety standards.

16.4 Parents must receive sufficient information to give informed consent and understand material risks, arrangements and insurance limitations.

## 17. Adventurous activities and specialist providers

17.1 Adventurous activities require the approval route specified by EVOLVE and current National Guidance.

- 17.2 Where an external provider is responsible for technical instruction or activity safety, the School retains its pastoral and safeguarding duty of care.
- 17.3 The Visit Leader must establish that the provider is suitable. Normally this will be demonstrated by a current LOTC Quality Badge or by satisfactory completion of the School/EVOLVE Provider Form and any additional checks required.
- 17.4 Where the Adventure Activities Licensing regime applies, appropriate licensing must be verified.
- 17.5 Where School staff lead specialist activities, their competence and approval must be recorded before the activity takes place.

## 18. Water activities and swimming

- 18.1 All planned swimming and water-based activity must be included in the visit plan and appropriate lifeguarding, supervision and rescue arrangements established in advance.
- 18.2 Swimming in non-lifeguarded pools, open water or other water-based adventurous activity requires specific risk assessment and appropriate competence/approval.
- 18.3 Hotel pools must not be treated as automatically safe. The Visit Leader must establish the lifeguarding position and control access accordingly.
- 18.4 Water-margin activities must be managed in accordance with current National Guidance and staff must understand the relevant hazards and boundaries of the activity.

## 19. Behaviour, alcohol, vaping and substances

- 19.1 The School's Behaviour and Discipline Policy and Smoking, Vaping, Alcohol and Misuse of Substances Policy apply throughout educational visits and boarding outings.
- 19.2 Pupils must be briefed on expected conduct and on any visit-specific rules or sanctions before departure.
- 19.3 The School's **Smartphone-Free and Mobile Phones in School Policy** applies to pupils participating in educational visits and trips, subject to any specific arrangements approved by the Visit Leader:
  - 19.3.1 Pupils must not assume that participation in an off-site visit permits access to or use of a smartphone during periods when such use would otherwise be prohibited by School policy.
  - 19.3.2 Where the nature of a visit, residential stay, overseas trip, boarding activity or travel arrangements makes access to a mobile phone or smartphone appropriate for **safety, communication, travel, navigation or contact with home**, the Visit Leader will determine and communicate the arrangements for its possession and use as part of the visit planning and risk assessment.
  - 19.3.3 Any permitted use must be **proportionate, purposeful and consistent with safeguarding expectations**, including appropriate restrictions on photography, video or audio recording, social media, messaging, location sharing and the recording of other pupils or staff.
  - 19.3.4 Pupils remain subject to the School's Behaviour and Discipline Policy and Smartphone-Free and Mobile Phones in School Policy throughout the visit, and unauthorised or inappropriate use may result in the device being confiscated and/or other sanctions being applied in accordance with those policies.
  - 19.3.5 For boarders participating in evening, weekend or residential activities, the School recognises that access to a smartphone may form part of the agreed arrangements for communication with home and personal time. Such access will be managed in accordance with the boarding provisions of the Smartphone-Free and Mobile Phones in School Policy and any additional arrangements specified by the Visit Leader or boarding staff.
- 19.4 Alcohol may only be provided to a pupil where this is expressly permitted under School policy and specifically authorised for the visit. No pupil may consume alcohol before or during an activity where doing so could affect safety, supervision, judgement or participation.
- 19.5 Staff must remain fit to discharge their professional and safeguarding responsibilities. On residential and overseas visits, the Visit Leader must ensure that a sufficient number of adults remain entirely alcohol-free and capable of responding to any reasonable emergency at all times.

19.6 Vaping, smoking, illegal drugs and misuse of substances will be managed in accordance with School policy and may result in a pupil being removed from the visit where necessary to protect welfare or safety.

## 20. Parental information and consent

- 20.1 Parents should receive sufficient information about visits to understand the nature, purpose, arrangements and any significant risks.
- 20.2 Consent requirements will follow current DfE/OEAP guidance and School procedures. Specific consent will normally be obtained for residential, overseas, adventurous or other visits requiring a higher level of planning or risk assessment.
- 20.3 Parents must provide accurate and current emergency, medical and other relevant information and notify the School of material changes before departure.

## 21. Inclusion and reasonable adjustments

- 21.1 The School will plan visits inclusively and make reasonable adjustments for disabled pupils and pupils with additional needs in accordance with the Equality Act 2010.
- 21.2 Inclusion does not require the School to expose a pupil, staff member or group to an unreasonable level of risk. Decisions must be individual, evidence-based and documented where participation needs adaptation or cannot safely proceed.

## 22. Emergency and critical incident arrangements

- 22.1 Every visit must have appropriate emergency arrangements. Staff must know what to do in the event of accident, illness, safeguarding concern, missing pupil, transport failure, major incident or other emergency.
- 22.2 Residential, overseas, adventurous and out-of-hours visits, including boarding weekend/evening visits where appropriate, must identify an appropriately briefed home-base emergency contact who is not participating in the visit.
- 22.3 The home contact must have access to the information reasonably necessary to support an emergency response, including participant and staff lists, contact details, itinerary and EVOLVE information.
- 22.4 Critical incidents must be managed in accordance with the School's emergency/critical-incident plan and reported to senior leadership and safeguarding leads as appropriate.
- 22.5 The School should periodically test educational-visit emergency arrangements and review them following a significant incident or material staffing change.

## 23. Insurance and finance

- 23.1 The Visit Leader must ensure that the visit is appropriately insured and should consult Finance where cover is uncertain, particularly for overseas, hazardous or specialist activities and pupils with relevant medical conditions.
- 23.2 Where a tour operator or specialist provider is used, relevant insurance should be checked as part of provider assurance.
- 23.3 Financial arrangements and cancellation terms should be made clear to parents before significant commitments are entered into.

## 24. Records, monitoring and retention

- 24.1 EVOLVE is the principal record of visit planning and approval. The School must be able to evidence the arrangements for safety and supervision on school journeys.
- 24.2 The record set should include, where applicable:
  - EVOLVE submission and approvals;
  - risk assessments and event-specific notes;
  - pupil and staff lists;
  - relevant medical, safeguarding and support information;
  - parental consent where required;
  - provider, licensing and insurance checks;

- transport records;
- emergency contact arrangements;
- accommodation checks;
- incident, accident and near-miss records;
- post-visit evaluation and actions.

24.3 Boarding records must support the National Minimum Standards requirement to maintain and monitor risk assessments and action taken in response, parental permission for high-risk activities, checks on relevant adventure-activity licensing and assessments of off-site accommodation.

24.4 Records must be retained securely in accordance with the School's records-retention and safeguarding requirements.

## **25. Evaluation, incidents and lessons learned**

25.1 Visit Leaders must review significant or complex visits after return and report accidents, safeguarding matters, near misses and material deviations from plan.

25.2 The EVC should use evaluation and incident information to identify recurring themes, amend generic risk controls, improve staff training and inform future approvals.

25.3 Serious incidents or significant safeguarding concerns should trigger a documented lessons-learned review involving appropriate senior leaders.

## **26. Policy monitoring and review**

26.1 The EVC will monitor implementation through EVOLVE records, visit evaluations, incidents, staff feedback and periodic sampling.

26.2 Boarding leadership should periodically sample weekend/evening trip records to confirm that the proportionate routine-outing process is operating effectively.

26.3 This policy will be reviewed at least annually and earlier if there is a significant change to law, statutory guidance, OEAP National Guidance, boarding standards, School structure or operational practice.

## Appendix 1 - Boarding and Weekend Activities Checklist

This checklist is intended for routine, familiar, low-risk boarding outings operating within an EVC-approved generic framework. It does not replace EVOLVE where a full submission is required.

| Check | Requirement                                                                                                                 | Record / detail | Completed                |
|-------|-----------------------------------------------------------------------------------------------------------------------------|-----------------|--------------------------|
| 1     | Activity/destination is routine, familiar and within the approved low-risk framework.                                       |                 | <input type="checkbox"/> |
| 2     | Date, departure time and expected return time recorded.                                                                     |                 | <input type="checkbox"/> |
| 3     | Named responsible member of staff and accompanying adults recorded.                                                         |                 | <input type="checkbox"/> |
| 4     | Accurate pupil list recorded before departure.                                                                              |                 | <input type="checkbox"/> |
| 5     | Relevant medical, SEND, behaviour and safeguarding information checked.                                                     |                 | <input type="checkbox"/> |
| 6     | Supervision level is appropriate for the pupils, activity, location and time.                                               |                 | <input type="checkbox"/> |
| 7     | Any independent/remote-supervision arrangements are defined and understood.                                                 |                 | <input type="checkbox"/> |
| 8     | Transport arrangements are suitable and recorded.                                                                           |                 | <input type="checkbox"/> |
| 9     | Staff and pupils know communication, rendezvous and recall arrangements.                                                    |                 | <input type="checkbox"/> |
| 10    | Home/boarding emergency contact is known and has necessary information.                                                     |                 | <input type="checkbox"/> |
| 11    | Weather/conditions and any material change to risk have been considered.                                                    |                 | <input type="checkbox"/> |
| 12    | On return, all pupils are accounted for and handed back into the boarding duty system.                                      |                 | <input type="checkbox"/> |
| 13    | Any incident, near miss, safeguarding concern or significant change is recorded and escalated.                              |                 | <input type="checkbox"/> |
| 14    | If the activity has become higher risk or falls outside the generic framework, a full EVOLVE submission has been completed. |                 | <input type="checkbox"/> |

## Appendix 2 - Educational Visits Record Set / Inspection Evidence

| Record                                 | When expected                                                 | Evidence location / note |
|----------------------------------------|---------------------------------------------------------------|--------------------------|
| EVOLVE approval                        | All visits requiring EVOLVE approval                          |                          |
| Risk assessment / event-specific notes | As required by risk and complexity                            |                          |
| Participant and staff lists            | All visits                                                    |                          |
| Medical / safeguarding information     | As relevant                                                   |                          |
| Parental consent                       | Where required                                                |                          |
| Provider / LOTC / AALA assurance       | Where an external/specialist provider is used                 |                          |
| Transport assurance                    | Where School-arranged transport is used                       |                          |
| Accommodation assessment               | Residential visits                                            |                          |
| Emergency/home contact arrangements    | Out-of-hours, residential, overseas and as otherwise required |                          |
| Incident / near-miss report            | Where applicable                                              |                          |
| Post-visit evaluation                  | Significant, complex or repeat visits and where lessons arise |                          |

## Appendix 3 - Key external guidance

- Department for Education: Health and Safety on Educational Visits.
- Keeping Children Safe in Education 2026.
- Department for Education: National Minimum Standards for Boarding Schools, May 2026.
- OEAP National Guidance.
- Foreign, Commonwealth & Development Office travel advice.
- Disclosure and Barring Service / Department for Education guidance on regulated activity with children from 1 September 2026.