

JOHN TAYLOR MULTI ACADEMY TRUST



Trust Management Arrangements for Educational Visits (Public)

Reviewed:	May 2025
Next review date:	May 2026
LGB procedures:	Yes
Owner:	M Donoghue

1. Success Indicators

- a) Each school/service has its own documented arrangements for educational visits which:
 - Outlines its expectations of how learning outside the classroom, outdoor learning and off-site visits will be managed and
 - Explains the procedural requirements, clarifies the responsibilities of all stakeholders and outlines monitoring arrangements.
- b) The trust adopts and works within the Outdoor Education Advisers' Panel (OEAP) National Guidance (NG) and staff with responsibilities in this area have access to this guidance.
- c) Each school/service has appointed an Educational Visits Coordinator who is trained according to section 5's requirements.
- d) Each school/service uses the EVOLVE system to record, approve and manage educational visits.
- e) Staff and students participating in educational visits have received suitable and sufficient information, instruction, and training appropriate for their responsibilities.
- f) Each school/service has an emergency plan in place for every educational visit, which is suitable and appropriate for the visit.
- g) Appropriate communication about the educational visit, health and safety information, and any emergency arrangements are communicated to all relevant parties, such as staff, students, parents and carers.

2. Overview

These Management Arrangements are in place for schools and services where John Taylor Multi-Academy Trust (JTMAT) is the employer.

These arrangements cover any visit that leaves the school/service grounds, whether as part of the curriculum, enrichment, during school time, or outside the normal day.

The Department for Education provide guidance for [Health and safety on educational visits](#).

3. Management Arrangements

JT MAT has formally adopted the Outdoor Education Advisers' Panel (OEAP) National Guidance (NG) as its guidance for the management of off-site visits and learning outside the classroom (LOtC). This guidance can be found on the following web site: <http://oeapng.info>

These Management Arrangements outline the main requirements for LOtC and provide links to appropriate sections of the National Guidance for additional information.

Schools/services are required to create their own educational visit arrangements in accordance with this policy. These should be specific to the establishment and include visits to the local learning area and the local area.

For further information and guidance, please refer to the NG document [5.3b How to write an establishment visit policy](#)

Guidance on Health and safety on educational visits is available from the

Department for Education (DfE) [Health and safety on educational visits - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/guidance/health-and-safety-on-educational-visits)

Where a JT MAT employee commissions a Learning Outside of the Classroom activity, they must ensure and record that such a commissioned agent has either adopted National Guidance or has systems and procedures in place where the standards are not less than those required by National Guidance.

4. Scope and Remit

JT MAT Management Arrangements applies to schools/services whose work involves any one of the following:

1. Direct supervision of young people or others:
 - undertaking experiences beyond the boundary of their normal operational base.
 - undertaking experiences that fall within the remit of Learning Outside of the Classroom.
2. Facilitating experiences for young people or others undertaking experiences beyond the boundary of their normal operational base.
3. Deploying staff that will supervise or facilitate experiences for young people or others undertaking experiences beyond the boundary of their normal operational base.

This document applies regardless of whether the activities take place within or outside of normal working hours, including weekends and holiday periods.

5. Roles and Responsibilities

The OEAP provides guidance about aspects of law that apply to outdoor learning, off-site visits, and the LOTC [Underpinning Legal Framework and Duty of Care \(Document 3.2a\)](#).

The OEAP guidance also sets out clear roles and responsibilities for specific staff within settings, including:

Education:

- Trust Management Boards and Governing Bodies.
- Headteachers and Managers.
- Educational Visits Coordinator (EVC).
- Visit and Activity Leaders.
- Assistant Leaders.
- Volunteer helpers.
- Those in a position of parental authority.

Educational Visits Coordinators (EVC)

All schools/services that carry out educational visits are required to have a trained EVC in post.

EVCs should initially attend a full 6-hour OEAP Educational Visits Coordinator training course and attend revalidation training periodically (every 3 years), or other appropriate systems should be in place to ensure EVCs stay up to date with current systems and best practices. In addition to attending a training course, an EVC should

have prior experience in leading educational visits or have support from other establishment employees who are experienced in leading LOtC.

Where the EVC role is attached to an administrative post or is not an experienced visit leader, the EVC will require structured access to and support from a designated colleague who fits the recommended criteria and who will fulfil those aspects not covered by the post holder.

[Legal Framework & Employer Systems](#) (Document 3.4j)

Visit Leaders

Where an employee regularly leads educational visits, Visit Leader (VL) training is strongly recommended, especially for Early Career Teachers.

EVC and VL training courses are available through Entrust and delivered by the Entrust Educational Visits Advisor (EVA), or an endorsed OEAP trainer.

[Legal Framework & Employer Systems](#) (Document 3.4k)

Assessment of Leader Competence

The NG provides clear advice regarding the assessment of leader competence. All leaders and their assistants must be formally assessed as competent to undertake the responsibilities they have been assigned in line with NG. For general visits, it is the responsibility of the school/service manager, Headteacher or person delegated to approve visits to ensure that competency checks have been made to ensure the visit leaders and assistants can plan, deliver and supervise educational visits effectively and safely.

For educational visits that fall into the adventurous or additional risk activities category (see section 8 below), visit leaders should ensure that contracted provider staff have additional NGB qualifications or competence assessments to allow them to lead effectively. EVCs must be confident that visit leaders have appropriate competence to lead the visit effectively.

For further information, please refer to the NG Document Approval of leaders [Legal Framework & Employer Systems](#) (Document 3.2d)

6. Guidance and Training for Employees

As the employer, JT MAT is required to ensure that its employees are provided with guidance and information relating to LOtC and Educational Visits:

1. Guidance for the management of outdoor learning and LOtC in JT MAT is the Outdoor Education Adviser's Panel 'National Guidance' website www.oeapng.info.
2. The relevant training courses recommended in JT MAT are:
 - Educational Visits Coordinator (EVC) training, which is **mandatory** for all EVCs.
 - Visit Leader (VL) training – this course is **strongly recommended** for all those who lead LOtC activities.
3. Suitable systems and processes to keep those trained updated.
4. Access to advice, support and further training from appointed professional advisers. JT MAT has commissioned Entrust to provide an Educational Visits Advisor (EVA) to advise and guide educational visits to its schools and services.

7. Notification and Approval of Activities and Visits

JT MAT requires all schools and services to use the online system EVOLVE for notification and approval for all visits that the school may undertake. Entrust provides access to EVOLVE via their Educational Visits and Guidance SLA.

A key feature of EVOLVE is that visits and LOtC activities requiring formal EVA acknowledgement can be brought to the attention of the Entrust EVA. Those visits and activities not requiring EVA acknowledgement may also be viewed, sampled, and/or monitored.

It is the responsibility of the school/service to keep the school user accounts up to date on the Evolve System. All employees of the school should have their own Evolve account, with an associated staff email so they can be added to visit forms and enable them to access Evolve and view any visit forms they are associated with. The EVC at the school can manage this and can create, amend, or remove staff accounts as required. If the EVC or Headteacher at the school changes or there are any issues with their accounts, they must contact the Entrust EVA.

Approval of Visits

JT MAT requires headteachers/service managers to formally approve ALL offsite educational visits and LOtC activity taking place in accordance with these Management Arrangements and OEAP guidance. All visits must be approved on the Evolve system prior to the visit's departure.

The nominated visit leader and team are responsible for completing the form and the associated risk management and supervision plans as part of their visit planning. The visit Leader is also responsible for fully briefing all supervisory staff regarding the nature of the visit and their roles and responsibilities.

The approving person and the Trustees or management board are responsible for ensuring the safety and well-being of the participants in the visit.

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

- An overseas visit.
- A residential or overnight stay (at home or abroad).
- An adventurous activity.
- Any higher risk visits and activities as follows:
 - o Multi Activities (including those delivered by external providers).
 - o Abseiling.
 - o Adventure parks, Assault and Challenge Courses
 - o Air Activities (excluding commercial flying).
 - o Archery target/field/clout & other target sports.
 - o Armed Service Providers.
 - o Boating - all forms excluding commercial transport.
 - o BMX and Skateparks.
 - o Camping.

- Paddlesport Activities, including canoeing, kayaking, and standup paddleboarding.
- Coasteering / Coast Scrambling / Sea level traverse.
- Duke of Edinburgh Award Expeditions and training (including walking, cycling, canoeing and horse riding).
- High-level Ropes Courses and Zip Lines.
- Hill Walking and Mountaineering.
- Horse Riding and equine care.
- Kite surfing / buggying.
- Knife and Axe throwing.
- Motorsport, all forms including Karting and Quad trekking.
- Mountain Biking (Off road cycling).
- Open Country - all activities (beyond 30 mins of nearest refuge and above 500m.)
- Rafting/Improvised Rafting.
- River / Gorge Walk / Scramble.
- Rock Climbing including natural rock and man-made indoor or outdoor walls.
- Sailing / Windsurfing.
- Shooting including air, clay, laser tag sports, paintball and airsoft.
- Skiing and Winter sports, including skiing indoor and dry slope, snowboarding, tubing, and sledging.
- Snorkelling and aqualung diving.
- Surfing including board, body board and skim board.
- Swimming all forms excluding UK Public Pools.
- Underground exploration.
- Use of powered safety craft.
- Water skiing and wakeboarding.
- Trampoline and inflatable parks.
- Fieldwork in Coastal, River and upland locations.
- Any other activity which has additional risks.

This notification includes any activities delivered by external providers or approved competent establishment leaders, even those with the required NGB qualifications.

The Evolve system is configured to send all overseas, residential, or adventurous visits to the EVA for comment, acknowledgement, and guidance. The forms must be submitted with sufficient time for the EVA to acknowledge these visits and for schools to act upon any guidance added to them. Please see the guidance on timescales on the Evolve homepage.

The school must consider and respond to any comment, guidance and recommendations the EVA has added to the form and address them prior to the visit's departure.

Regular and Repeated Visits (Evolve Module - Local Area Visits).

Visits/activities within the 'Local Learning Area' are part of the normal curriculum and occur during the normal school day including after school clubs and PE fixtures.

These visits/activities:

- Must be recorded on EVOLVE via the Local Area Visit form.

- Do not require parental consent (although parents must be informed of the visit).
- Do not normally need any additional risk assessments/notes.

Each schools/services' Operating Procedure and Local Management Arrangements set out boundaries of the local learning area and include frequently visited locations, prohibited areas within the local area, and which methods of transport can be used.

The school/service must create an Operating Procedure that includes a generic risk assessment for the area, including information on specific hazards such as road traffic, interaction with the public, animals, etc., losing a pupil, the local landscape, and any specific issues relating to fieldwork, e.g., environmental factors, rubbish, etc.

The EVA must check this, and it should be shared with all Visit Leaders at the school /service. All staff must follow this guidance. All visits to the Local Area must be logged using this section on Evolve so the establishment has an accurate record of all visits.

This includes all after-school fixtures and PE activities, but only the journey to and from the venue is covered by OEAP guidance. The organisation of the activity itself should be as required or recommended by specialist PE guidance, such as the Association for Physical Education (AfPE).

8. Planning and Evaluation

Planning for any educational visits should ensure:

- The plan is based on establishment procedures, National Guidance, information in EVOLVE and these Management Arrangements. See also section 9. Risk Management below.
- All staff (including any adult volunteer helpers), and the people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk assessment process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required and that all details of the activity provision are accessible to the emergency contact throughout the period of the activity.

Parental Consent and Informing Parents

Guidance about when and how consent for educational visits should be obtained and what information should be provided to parents is available from:

- The DfE guidance [Health and Safety on educational visits](#)
- [OEAP National Guidance](#)

Data Protection

Whether consent is recorded electronically or paper-based, it is likely to contain personal data that is subject to data protection law.

The Evolve system does not automatically delete archived visits and so the storage and retention of personal data should follow the establishment's privacy policy and be manually deleted when appropriate.

[Information on participant information and data protection issues.](#)

For further information, refer to NG's "Good Practice" documents.

<http://oeapng.info/downloads/good-practice>

9. Risk Management

Suitable and sufficient risk management systems must be in place as part of planning for educational visits.

The risk assessment of an activity should be balanced by the benefits to be gained from participating. The Health and Safety Executive (HSE) endorses this approach through its 'Principles of Sensible Risk Management' and advocates that people should be exposed to well-managed risks so that they learn how to manage risk for themselves.

Schools/services must produce their own risk assessments for any educational visits. A risk assessment should be recorded, and suitable and sufficient control measures must be identified and implemented. The results of any risk assessment must be communicated to all staff, participants, parents, and pupils as appropriate. Templates and examples of risk management materials can also be accessed through EVOLVE, and training is provided during the Entrust EVC and VL courses.

Generic risk assessments may be used, but it is the responsibility of the Visit Leader to amend them for each specific visit to make them relevant to the group, staff, activity, environment and remoteness of the actual visit.

For further information, please refer to the NG document: [Risk Management Overview \(Document 4.3c,f,g\)](#)

10. Preliminary Visits and Provider Assurances

All visits should be thoroughly researched to establish the suitability of the venue and check that the facilities and third-party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of people. It is a vital dimension of risk management.

Wherever reasonably practicable, carrying out a preliminary visit is good practice. School/service arrangements should clarify the circumstances where a preliminary visit is a requirement. If this is not possible, then the use of brochures, websites and previous knowledge from past visits or other establishments should be considered. The schools/services arrangements should clarify when preliminary visits are required along with any information required from the provider.

Visit leaders should take full advantage of the nationally accredited provider assurance schemes that are now available, thus reducing bureaucracy.

Examples of such schemes include:

- Learning Outside the Classroom (LOtC) Quality Badge.

- Adventure Activities Licensing Service (AALS) licensing.
- Adventuremark.
- National Governing Body (NGB) centre approval schemes
- (applicable where the provision is a single, specialist activity).
- AHOEC Gold Standard.

For some adventurous and additional risk activities, using non-accredited providers is possible as these activities do not fall within a recognised accreditation scheme.

If the activities being provided fall within the scope of AALS licensing, the provider must have a license.

[Legal Framework & Employer Systems](#) Document 3.2f AALA Licencing

If they do not fall within the above scheme or accreditations, the providers are required to complete an Activity Provider Checklist. This must be completed and signed by the provider and added to the EVOLVE visit form. A new Activity Providers Checklist is not required for each visit if the information on the form refers to the activity being carried out.

If the provider has not been used within 6 months, then they should be contacted to see if the information on the **Activity Providers Checklist** is still correct.

Where the provider is not a LOTC Quality Badge holder or a DofE Approved Activity Provider (Expedition Section) and is utilising residential accommodation, including campsites, used for more than one night, then the provider must complete an **Accommodation Provider Form**. The procedures in the previous paragraph apply if the venue is used on subsequent occasions.

Both the Activity Provider Checklist and Accommodation Provider form can be downloaded from the Key Resources section on the EVOLVE homepage. [Good Practice](#) – Document 4g Selecting External Providers and Facilities

Contracts and Waivers.

A school may contract with a provider to provide a range of LOTC activities for students attending their school. It is the schools' responsibility to ensure they are fully aware of the terms and conditions of the contract. Any contracts should be between the school and the provider, not the provider and the parent.

Several providers who offer additional risk activities are now providing information regarding the additional risks of participating in certain activities. Parents and carers should be informed of these as part of the informed consent process.

If a provider requests a waiver to be completed, please consider this very carefully, as it may be requesting things that are against NG and JT MAT policy.

If you are unsure of any aspect of the waiver contents, please contact Entrust EVA. Parents should not sign these forms directly on the provider's website.

[Legal Framework & Employer Systems](#) Document 3.2i Contracts and Waivers

11. Requirements to Ensure Effective Supervision

The law does not prescribe activity-specific staffing ratios (except for the Early Years Foundation Stage Framework), but it does require that the level of supervision and group management is effective.

Effective supervision should be determined by a proper consideration of:

- Age (including the developmental age) of the group.
- Gender and gender issues.
- Ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics, etc.)
- Nature and location of the activity (including the type of activity, duration, skill levels involved, as well as the time of year and prevailing conditions).
- Staff experience and competence.

When calculating ratios for groups, the establishment must ensure that sufficient competent staff is available to effectively supervise the group during all aspects of the visit.

Staff from external visit providers should not be included in the supervision ratios as they may not be present for the whole visit. When using external providers, they are responsible for delivering the activity and ensuring its safe delivery. School/service visit leaders are required to supervise in a pastoral capacity during these periods.

For periods such as downtime, during transport and any other periods when the provider does not directly instruct the students, the direct supervision of the students becomes the responsibility of the school/service visit leaders so clear and effective supervision plans must be in place and understood by all parties.

The school's/service's responsibility is to devise and implement a procedure regarding alcohol consumption by staff and/or students. This procedure must be written down and shared with all parties, such as the school, staff, providers, students, parents and carers. All parties should agree to it.

It is essential that staff can always maintain effective supervision and that the laws regarding alcohol consumption in the country visited are followed.

[Good Practice](#) – Document 4.2a Group Management and Supervision
Document 4.2b Ratios and Effective Supervision

12. Vetting and Disclosure and Barring Service (DBS) Checks. Employees who frequently or intensively work with or have regular access to young people or vulnerable adults must undergo an enhanced DBS check as part of their recruitment process.

For the purposes of these Management Arrangements:

- Frequently is defined as once a week or more.
- Intensively is defined as four days or more or overnight.

However, it must be clearly understood that a DBS check (or other vetting procedure) is no guarantee of an adult's suitability to work with any given group of young or vulnerable people.

In addition, any safeguarding policies and procedures at the school/service must be followed. These may include specific local procedures but also those supported by JT MAT for maintained schools/services.

[Good Practice Document 4.3e Safeguarding](#)

13. Inclusion and Equality

Every effort should be made to ensure that Educational Visits and LoTC activities are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender, or religion. If a visit needs to cater to people with special needs, every reasonable effort should be made to find a venue/activity that is both suitable and accessible and that enables the whole group to participate fully.

Schools/services should take all reasonably practicable measures to include all young people. The principles of inclusion should be promoted and addressed for all visits and reflected in local policies, thus ensuring an aspiration towards:

- An entitlement to participate.
- Accessibility through direct or realistic adaptation or modification. - Integration through participation with peers.

[Legal Framework & Employer Systems](#) (Document 3.2e)

14. Transport

Providing transport for off-site activities and educational visits must be an integral part of the planning process. The Visit Leader should ensure that coaches and buses are hired from a reputable company.

The DVLA provides clear guidance on operating such vehicles, and it is recommended that operators familiarise themselves with this guidance and the relevant law.

Minibus drivers must have the correct driving licence requirements and be competent to drive the vehicle safely. It is a requirement for drivers who want to carry passengers on a minibus they must successfully complete a Minibus Driver Training Scheme such as MIDAS.

A section 19 permit must be obtained before the driver of the minibus can commence the Minibus Training Scheme.

This training only applies when the driver is carrying passengers, e.g., not when taking a minibus for a service. As evidence, this should be logged on the Evolve system in the user's awards profile.

Transporting people in private cars must form part of the planning and risk assessment process, and where this occurs, procedures should be recorded. If there is potential for the need to use private cars it is the school's/service's responsibility to ensure that the appropriate checks have been made on both the driver's experience and qualifications and that the vehicle to be used has the appropriate level of insurance, road tax and a valid MOT.

The level of supervision on any transport should be considered as part of the risk assessment process when planning the journey.

[Good Practice](#) – section 4.5

15. Emergency Planning and Critical Incident Support

All schools/services must have a clear Emergency Plan in place to deal with Critical Incidents. Please refer to the NG document which discusses all aspects which should be considered when devising this plan. [Good Practice](#) (Emergencies).

A critical incident includes where any member of a group undertaking an offsite activity has:

- Suffered a life-threatening injury or fatality.
- Is at serious risk.
- Been missing for a significant and unacceptable period.

All members of the school/service including visit staff, leadership team and Trustees should be aware of this plan and how to implement it.

Action to take when a critical incident occurs.

1. The school/service should refer to its Critical Incident Plan in the first instance.
2. If the level of incident is beyond the coping mechanisms of the above plans, then schools/services should contact JT MAT.

The 24-hour Emergency number for the CEO is [REDACTED]. In the unlikely event that the CEO does not get back to you within a reasonable time period, then contact should be made with the Chief Operating Officer.

In addition to the school/service contact numbers, leaders should always carry these numbers during off-site activities beyond normal office hours or on weekends. In the first instance, staff should contact their school/service emergency contact numbers, and then their staff should use the above numbers if required.

These numbers should not be given to young people/service users or to their parents or guardians under any circumstances.

16. First Aid and Accident Reporting

There is no legal requirement that all visits have a fully trained first aider on the visit leader team, but this should be considered good practice.

First aid training should be appropriate for the activity and environment the group is operating in. Staff who lead adventurous and additional-risk activities must have valid and relevant first aid training, which is also required to validate any National Governing Body (NGB) qualifications they may hold.

When using a provider, checks should be made regarding the level of first aid provision.

For visits either abroad or some distance from the establishment, visit leaders must ensure they know the location of additional first aid assistance and how to summon it if required. This must be part of the planning and emergency procedures process.

If an attendee has a specific medical requirement, staff must be trained as required to enable them to assist the attendee to manage their medical requirements.

<https://oeapng.info/download/1148/> Document 4.4e First Aid

DfE guidance – [Supporting pupils at school with medical conditions](#) page 22

All incidents involving anyone—employees, pupils, service users, contractors, or members of the public—when engaged in JT MAT activities are to be recorded, investigated, and reported in accordance with the JT MAT Accident Management Arrangements.

17. Monitoring

JT MAT will receive management information from Entrust regarding compliance with the use of EVOLVE and the monitoring and implementation of these Management Arrangements.

Employers must ensure that any procedures in place to manage educational visits and LOtC are effectively monitored. JT MAT will check that off-site visit arrangements are in place through specific staff (including EVC) and joint training opportunities and network meetings, however, the main monitoring role within schools/services is delegated to Headteachers/managers and their EVCs.

Schools/services and their EVCs should ensure that appropriate systems are in place for monitoring offsite visits. Monitoring should include checks on procedures, training, reviews following visits, and sampling (field observation) to ensure that procedures are followed during visits. Records of any monitoring, including field monitoring carried out by the school/service, should be entered into Evolve.

Further information on monitoring is available in the National Guidance documents:

<http://oeapng.info/downloads/legal-framework-and-employersystems>

(document3.2b)

As part of the Educational Visits Advisory Service provided by Entrust, the EVA may undertake sample monitoring of visits, which can include field monitoring. If possible, schools will be informed of the planned monitoring before the visit. If the EVA carries out a monitoring visit, they will provide the school with feedback including a monitoring report.

18. Insurance for Off-Site Activities and Visits

Employer's Liability insurance and Public Liability insurance are statutory requirements, and all establishments must have appropriate insurance in place, which includes appropriate indemnities for both employees and non-employees.

When providers are used, they should hold Public Liability insurance cover with a minimum limit of indemnity of £5 million. If the Public Liability insurance cover in place is less than the suggested £5 million minimum limit then the EVC of the school

must agree appropriate cover is in place for the nature of the visit and potential risks involved.

For further information on cover for specific activities or issues contact your insurer. The DfE have provided public sector schools with access to the risk protection arrangement (RPA) as an alternative to commercial insurance.

19. Charges for Off-Site Activities and Visits

Trustees, Headteachers, Managers, EVCs and Visit Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449462 of the Education Act 1996.

For further information, please refer to NG document: Charging for School Activities.

<http://oeapng.info/downloads/legal-framework-and-employer-systems>
(document3.2c)

20. JT MAT Supporting Information

Management Arrangements and guidance for:

- Risk Assessment
- Accident and Incident Management
- Driving Licence & Permit Requirements for Minibuses
- Business Continuity Planning
- Entrust Evolve site entrust-ed.co.uk/evolve-system

Version	Date	Reason	Approved
1	March 2025	Development of JT MAT Trust Policy with partners Capita Entrust - EVA Team	
2			