



Educational Visits Guidance Sheet

Depending upon what type of trip you are planning the documentation will be slightly different. Essentially, the more complicated the trip the more paperwork will be needed. There are 4 categories of trip:

- Category 1 – Day trip in school time less than 50 miles
- Category 2 – Day trip leaving and/or arriving out of school hours and/or over 50 miles
- Category 3 – Residential trip in mainland UK
- Category 4 – Overseas residential trip

STEP BY STEP GUIDE

Step 1 – Initial Approval

All trips must get initial approval by completing an **Educational Visit Approval Form**. This must be completed prior to a trip being organised. This includes a STAGER Planner and agreed costings (further info below). Check the diary to see if any other trips are already timetabled. Except in rare circumstances only one educational visit will be allowed on any given day so the quicker you get your form in the better.

- For Category 1 & 2 the **Educational Visit Approval Form** should be submitted no later than one month prior to the visit.
- For Category 3 & 4 the **Educational Visit Approval Form** must be submitted at least three months prior to the visit. Prior to completing this form, you should write a letter to the Chair of Governor's to ask permission for any residential and overseas visit.
- Trips should also be in the diary. If they are not in the diary then you must have a conversation with the Headteacher to get verbal approval before filling in this form.
- Once completed please share, with editing rights, with BEOTrips@blessededward.co.uk

Please do not begin to organise or advertise your visit until all 3 signatures have been added.

Step 2 – Collecting Payments & Consent

Once the trip has been approved, please send your parental letter to Kayleigh, in the Finance Office, including who they should go to. The ParentPay account will be set up and the letter attached. There is no longer any need for a paper consent form. Parents will fill this in on ParentPay when they pay for the trip. If the trip is free, it still needs to go on ParentPay. Once the trip is filled, Kayleigh will send you a spreadsheet with contact details and medical info for each student.

Please be aware that Pupil Premium students must be given advanced access to the visit at the agreed discounted rate. This will require two separate letters to be produced with the different costs. Please do not send letters home until you have agreed when Parent Pay will be available. Letters should state when Parent Pay will go live so they have advanced warning. You will need to speak to Kayleigh Williams to discuss this. We should aim to ensure that 20% of participants are PP.

July 2025



Educational Visits Guidance Sheet

Step 3 - Planning

For Category 1 visits the Visit Leader must share the following with BEOTrips@blessededward.co.uk:

- **Category 1 Visit Checklist**
- **Risk Assessments**
- **Emergency Contact Crib Card**
- **Medical & Contact details**

For Category 2 visits Visit Leader must share the following with BEOTrips@blessededward.co.uk:

- **Category 2 Visit Checklist**
- **Risk Assessments**
- **Emergency Contact Crib Card**
- **Medical & Contact details**

For Category 3 visits Visit Leader must share the following with BEOTrips@blessededward.co.uk:

- **Category 3 Visit Checklist**
- **Risk Assessments**
- **Emergency Contact Crib CardM**
- **Medical & Contact details**

For Category 4 visits Visit Leader must share the following with BEOTrips@blessededward.co.uk:

- **Category 4 Visit Checklist**
- **Risk Assessments**
- **Emergency Contact Crib Card**
- **Medical & Contact details**

For Category 2, 3 & 4 these should also be shared with the relevant SLT emergency contacts for the trip.

Step 4 - Evaluation

On return, please complete a **Visit Evaluation Form** and share it with the headteacher and EVC. Without this any future trips will not be approved. Please make sure to include comments on all of the sections. This should be completed no later than one month after the visit.



Educational Visits Guidance Sheet

STAGER PLANNER

This should be completed to show that you have considered everything you need to do to plan a trip. For advice on how to do this please speak to the EVC or follow this link for national guidance on how to plan and lead your visit: <https://oeapng.info/>

Staff – you need to say how many staff you will be taking but also the experience of those staff. Have you run the trip before – if so, how many times? If the trip involves adventurous activities are the staff trained to deliver them if needed?

Timing – you can start with the duration of the trip, but you also need to think about the time of year and how this might affect the trip. If it is a day trip, is it within school hours or do you leave or return before and after school? This info is important as it will help the EVC to determine what steps need to be added to the planning process.

Activity – obviously, the nature of the activity will have a significant impact on the planning process. The EVC will need to decide whether they feel the activity will be safe and appropriate. Please include as much detail as you can as it may involve an EVOLVE form being filled in. The EVC may see you to discuss this further.

Group – you are not expected to identify exact numbers or names of participants, but a general idea of total numbers and year groups is needed. You will also need to consider your staffing ratio. Even though there are no prescribed ratios, the EVC will look at your staffing and group numbers as well as the activity to determine whether you have enough staff for the visit.

Environment - you will need to include some information about how the environment might affect the trip. This could include weather conditions, terrain, rural or urban. Could changes to the environment affect the viability of the trip. If residential you will need to give details of the accommodation that will be used.

Remoteness - you will need to comment on travel distance & time to get to your destination. If it is an overseas visit you need to be aware of what the procedures for dealing with an emergency are. If students are not going to be supervised directly during the visit the leaders and student's need to know how to contact each other.



Educational Visits Guidance Sheet

COSTINGS

Before you plan a visit, you must make sure that it is economically viable, and all costs are included. However, even Maths teachers get stuff wrong so it's important that we get our costings checked and verified before we start asking parents for money. Obviously, some trips are more complicated than others, but you do need to consider the following:

- Cover - For the first two members of staff you do not need to charge for cover, however, for each additional member of staff you will need to add £200 for cover costs. If your trip takes a significant proportion of a year group, then you will be expected to organise for the timetable to be collapsed in order to reduce the need for cover.
- Transport - costs could include a coach, train tickets or school minibus.
- External Provider – payments to organisers such as NST, or just entrance to museums, etc.
- Additional Costs – anything not covered in the other 3 sections
- ParentPay – you need to add 2.4% on top to cover ParentPay fees
- Pupil Premium – you need to find out what the discount is for each trip. The percentage is different depending on the trip/visit. Remember we should aim to ensure that 20% of participants are PP.

The trip organiser must have discussed the costs with Kayleigh Williams, Finance Assistant, in the Finance Office. Kayleigh will only sign the approval form if this conversation has happened, and the information provided on the form matches what was discussed.

If you experience any issues or worries when planning a trip, please come and see the EVC who will be happy to talk you through the process. A one-to-one conversation is often better than a string of emails!!