

# A Staff Guide to Planning

## An Educational Trip or Visit

January 2026

EXCELLENCE AND EQUITY WITH INTEGRITY

Date of Approval:	January 2026
Approved by:	Zoe Levitt-Executive Director of Education
Date of next Review:	January 2028



## Educational Visit /Trip 'TO DO' LIST

All visits require a minimum of 2 weeks' notice to all concerned (unless the trip falls within the criteria for a pre-authorisation form to be completed and approved).

- Choose a date
- Choose a place

**Before any further steps are taken SLT approval must be gained via the completion of a calendar request or be pre-calendared.**

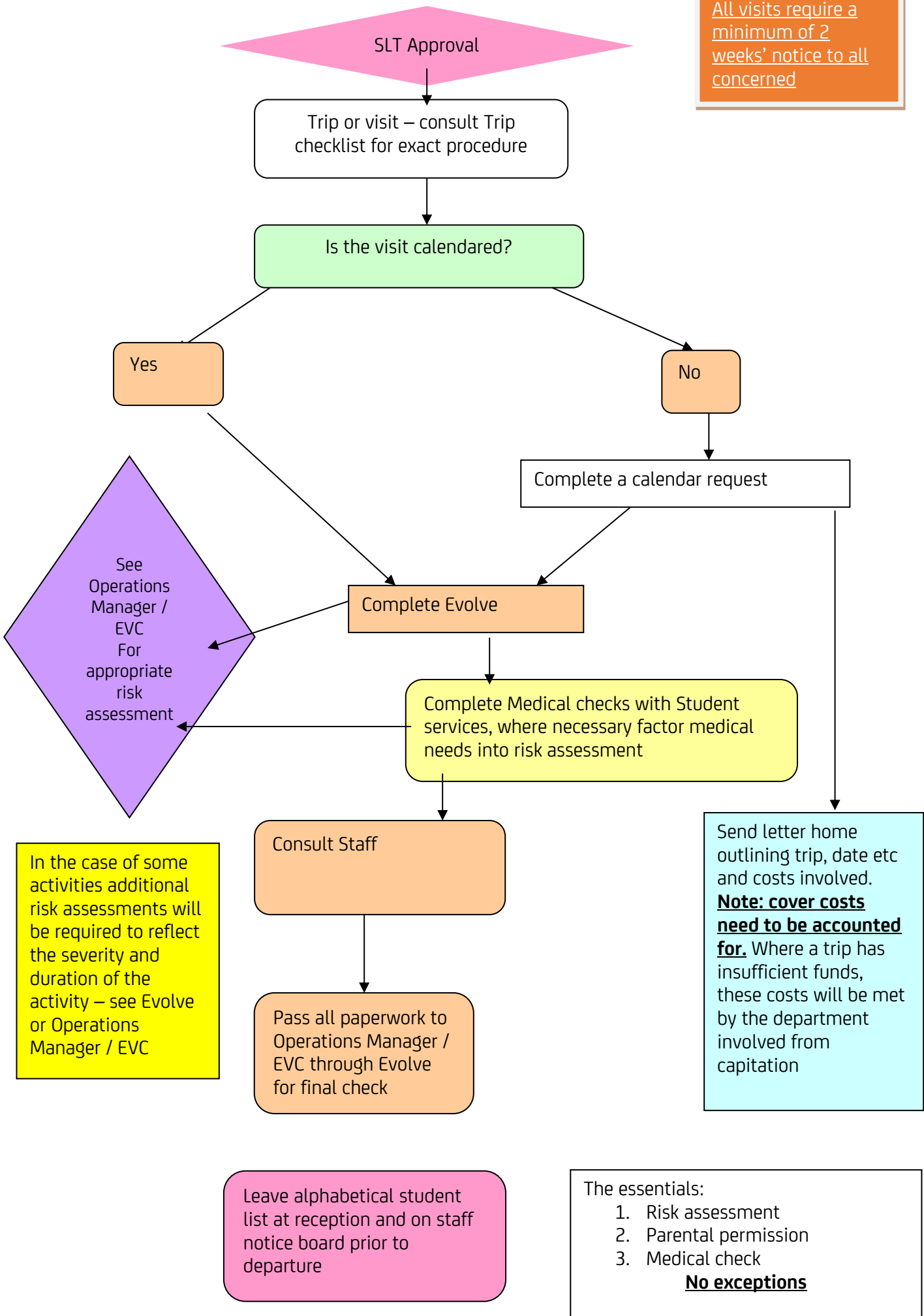
- Put visit on calendar with SLT agreement via calendar request - check against assessment and exams calendar for any clashes.
- Consult departments affected by trip.
- Contact the place and provisionally book. If the activity is of the adventurous type, approval from SLT and Trust will need to be gained.
- Decide on number of students.
- Decide on number of staff required – notify Cover Manager & Operations Manager for cover and factor in any cost implications (see Operations Manager for up-to-date costings, this needs to be a consideration).
- Provisionally book a coach company with finance.
- Compose and send letter home with students – give as much notice as possible, particularly if there is a significant financial cost. This should be printed on headed paper and proofread. Office staff can support you with this.
- Inform students how and when to respond etc.
- Inform finance office of trip and number of slips/monies to be dealt with etc.
- Complete EVOLVE.
- Contact necessary staff and 'invite' them to go – letting them know of any special requirements, i.e. special dress requirements/food etc. Staff should be selected based on equality of opportunity, availability and minimising impact on learning.
- Complete risk assessment and upload onto Evolve – see EVC if unsure of risk assessment involved. Ensure that risk assessments are adjusted accordingly and that a plan B is documented within it.
- Do a medical check with student services. For foreign trips medical checks are required with parents (see additional forms). Ensure that all students with specific medical concerns are identified and procedures in place for dealing with any possible issues e.g. diabetes and commented on in Evolve.
- Book medical bag/s for the period of the trip.
- Get approval of Learning Leader/HOD for departments affected.

- Get signature of Progress Leader for year group affected.
- Pass completed process through Evolve to Operations Manager / EVC.
- Confirm booking with venue.
- Confirm transport with the coach company or other transport through finance.
- Inform the academy food service of trip dates and number of pupils out.
- Inform Operations Manager / Cover Manager of staff accompanying trip – e-mail.
- Circulate a list of students to staff via email.
- If applicable - Provide Office Manager with a list of any remnant groups, numbers and register.
- If applicable - Arrange with Office Manager / Cover Manager what the remnant group will be doing and if it is necessary to set work.
- Remind academy food service the day before the visit about number of students out.
- If applicable - Arrange staff and student seating for the journey.
- Organise any necessary copies of registers/ medical lists for accompanying staff as necessary.
- Put notice in the bulletin reminding students who will be on the visit, times, location etc

#### ON DAY OF VISIT /TRIP

- Collect medical bag/s.
- Check that you have the medical list and any medication necessary.
- Register students before you leave, photocopy list and give completed copy to reception.
- If applicable - Confirm emergency telephone numbers.
- Enjoy the trip!

All visits require a minimum of 2 weeks' notice to all concerned



In the case of some activities additional risk assessments will be required to reflect the severity and duration of the activity – see Evolve or Operations Manager / EVC

Send letter home outlining trip, date etc and costs involved. **Note: cover costs need to be accounted for.** Where a trip has insufficient funds, these costs will be met by the department involved from capitation

Leave alphabetical student list at reception and on staff notice board prior to departure

The essentials:  
1. Risk assessment  
2. Parental permission  
3. Medical check  
**No exceptions**