



# Educational Visits and Journeys Policy

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**COMMITTEE:** Audit & Risk  
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**AUTHOR:** Shropshire Council

Signed \_\_\_\_\_  
Chair of Trust Board

Dated \_\_\_\_\_

Signed \_\_\_\_\_  
CEO

Dated \_\_\_\_\_

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## **Aims and purposes of Educational Visits**

The TrustEd Schools Alliance has a strong commitment to the added value of learning beyond the statutory school day and beyond the school premises by the use of carefully planned educational visits. It is part of the Trust's required role to provide a broad and balanced curriculum that promotes spiritual, moral, cultural, mental and physical development and prepares young people for the opportunities and experiences of adult life.

### **Introduction**

Each year our schools will arrange a number of activities that take place off the school site and/or out of school hours, which support the aims of each of our schools and which may include development of self through residential opportunities and a growing awareness of the local and global environment for all pupils.

The Trust engages with Shropshire County Council's Outdoor Education Advisory Services through an annual SLA agreement, which includes: generic risk assessments, specific risk assessment pro-formas and a range of supporting resources and documents to assist with visit planning. All visits must be planned in accordance with the most recent Local Authority (LA) and Trust advice in addition to local policies and codes of practice developed for individual schools within the Trust i.e LA local Ed visits Policy, eVisits online trip notification, National Guidance.

Where a visit involves a new venture to the establishment, visiting a developing country or remote area, an expedition, skiing or adventure activities using a new provider/company, establishments should take initial advice from the LA Outdoor Education Adviser and the Trust Office before making any financial commitment.

Local Governing Bodies have given their approval to the following types of activities being arranged in support of the educational aims of their schools:

- Out of hours Clubs (music, drama, art, science, sport, homework etc.);
- School teams away fixtures;
- Regular nearby visits (museums, libraries, shops, woodlands, place of worship, farms);
- Day visits for particular year groups;
- Transition days.

Local Governing Bodies should give formal consideration and permission before the following types of activities are arranged:

- Residential visits;
- Adventure Activities;

### **Planning**

An important principle in planning and conducting successful visits is to notify others of your plans as early as possible. This will involve notifying the Headteacher, Trust office, senior managers, the school's Educational Visits Co-ordinator (EVC) at the earliest possible stage. (In the first instance, initial contact should be made with the school's Headteacher). Early notification means that support, advice and guidance may be provided and acted

upon well before the visit takes place, should it be necessary, and an introduction to eVisits and the planning of a trip online.

It is expected that as far as is possible proposals for educational visits will be submitted during the summer term of the academic year preceding that of the visit and if not possible at least six weeks in advance of the proposed visit (one full term in advance of residential, high risk activities, adventurous and overseas visits). eVisit online notification can be worked online at any stage of the visit and saved in a draft format, completion can be done at the visit leaders discretion.

There is a general need to consider the frequency and calendar of all educational visits, events and to identify target students. We need to ensure that all are viable and do not clash or overstretch parents'/ faculties'/ school budgets or put strain upon spaces and cover. If the activity causes stress on the systems then approval may be denied or rescinded.

### **Approval Procedure and Consent**

- Each of the Trust's academies must appoint a member of staff to act as their Educational Visit Co-ordinator. This person should attend an appropriate training course (and updates) and be given sufficient time and resources to carry out the role. The Trust has delegated the consideration and approval of educational visits and other off-site activities to Trust Headteachers. Headteachers will keep their Local Governing Body aware of the Educational Visits Events & Programme via Local Governing Body meetings.
- Each school within the Trust will comply with the Trust guidelines for Educational Visits & Journeys. Copies of the LA Ed visits Policy doc, the use of eVisits and National Guidance link can be found on staffs eVisits homepage under Resource Library.
- Before a visit is advertised to parents the Headteacher must approve the initial plan. They will also approve the completed plan and risk assessments for the visit at a later date, via the online eVisits notification. Teachers and group leaders are to complete the attached form and submit it to the Headteacher as soon as practical. (See Appendix A) or submitted via eVisits to EVC.
- Where external contractors are involved in organising all or part of the visit the contract will be made with the school on behalf of the pupils. All payments for the visit will be made through the school's accounts.
- For regular out of hours clubs, school teams and nearby visits parents will be asked to sign a general letter of consent for participation in these activities when their son/daughter enters the school. (Example of consent form is located in Appendix I.) Parents will be given a letter for the activities that pupils are involved in and will be informed by phone if an activity has to be cancelled.
- For any visit lasting a day or more or involving significant travel, or adventurous activity parents will be asked to sign a letter, which consents to their son/daughter taking part. The school has a standard model letter (see Appendix J) which should be used for this purpose.

- As part of the parents' consent they will be fully informed of the activities and arrangements for the visit. For all residential visits parents will be invited to a briefing meeting where they can ask for clarification of any aspect of the itinerary and organisation of the visit.
- The Trust has separate statements for Charging and Remissions, Diversity, Equal Opportunities and Inclusion, which apply to all educational visits. GDPR regulations are followed and are contained in the appropriate policies.
- The Headteacher and group leader must ensure that any off site learning opportunity is fully compliant with the Trust's safeguarding procedures.
- Final authorisation will be approved and signed off by the Headteacher and issued to the school prior to the planned activity on eVisits. Evists will be monitored via the Trust office for all Schools as well as the individual school.

### **Level of Approval Required**

Visits vary in terms of location, duration, regularity and purpose. Consequently, different approval arrangements are appropriate for different types of visit. For approval purposes, parental and school approval must always be in place.

### **Classification of Visit and Methods of Approval**

#### **Category 1 visits (approved by individual Headteacher and school's EVC)**

These are visits and activities that are routine events presenting low levels of risk. These events can be adequately managed through the use of generic Risk Assessments (available from the EVC) and specific establishment operating procedures (such as a school's visits policy and existing risk management procedures).

Examples of these visits:

- Local events that occur as part of your work programme and within your normal operating hours (such as core operating hours or the school day);
- Sporting activities within your locality or those that take place immediately after hours, including trips to swimming pools, leisure centres or local sports fixtures;
- Local enrichment opportunities on site, or a short journey from it, such as to a café, village hall, church, library, Supermarket;
- Work placements which are subject to separate guidance – please contact the School's Business Manager/Headteacher.

Trust schools should keep written and approved records which should be kept by each school's EVC on a trip-by-trip basis or provide approval on an annual basis evidenced by the Group Leader's signature on the Risk Assessment for the planned visit(s).

Individual management plans or support for specific needs will require additional consideration when a new cohort or pupils unfamiliar to leaders are being worked with. Parental consent for these routine activities can be obtained annually or on a termly basis

when information is provided to parents and guardians outlining the visits and activities planned for that period.

Trust schools must ensure that:

- Operational procedures for the school are known and followed by staff including all controls as indicated within the activities specific risk assessment;
- A system is in place requiring group leaders to sign out and back into school at the end of the event;
- An emergency procedure is in place. This will include the school holding details of all who are participating on the visit and ensuring that the leader has a key contact to seek additional assistance should the need occur on the visit;
- Consent is in place and that key medical information and contact details of all participants are updated as appropriate. Leaders are aware of specific support needs of all participants.

### **Category 2A visits (approved by individual Headteacher/ and school's EVC)**

These are events and activities that do not normally form part of a local or regular input. They may extend beyond normal operating hours, necessitating a late return, but do not involve an overnight stay. Examples of these visits:

- All day visits to neighbouring cities or locations of interest;
- Theme park trips;
- All day low level walks or activities;
- Sporting fixtures that involve considerable travel.

Parents/guardians must be informed of such activities and specific consent is required in writing. This may be via a letter home and tear off consent slip or via the school's portal eg: Parentpay. As these trips are likely to be more complex, existing Risk Assessments need reviewing and a Specific Risk Assessment should be produced identifying safety management procedures for the event.

Trust schools must ensure that:

- A specific risk assessment is in place for the planned event/activity;
- Written information is provided to parents and guardians regarding organisational details;
  - Effective arrangements and/or contingency plans are in place to manage an unforeseen incident if it were to occur while on the visit;
- Approval is gained via the Headteacher.

### **Category 2B visits (approved by Headteacher and LA with Trust notification)**

These are the most complex and demanding activities, where participants and staff may be involved in residential visits, adventurous activities, activities with higher than normal risks and trips to higher risk environments. Examples of these visits:

- Residential visits or activities that require an overnight stay;
- Travel outside the United Kingdom, exchange visits, expeditions or study tours;
- High risk outdoor and adventurous activities including: canoeing, caving, high ropes courses, moor land and mountain walking, rock climbing, stream scrambling, sailing activities, mountain biking, wild country camping, pony trekking and open water swimming;
- Hazardous activities and or locations e.g. motorised sports, cliff edge walks, coastal walking;
- Planned entry into water in the environment such as river study.

Specific competency may be required to lead such events and a higher level of familiarisation will be required of staff who work on these trips. This may be through a pre-visit, comparable experience or competency assessment. Outside providers may be employed to deliver part or all of the visit or activities. This will require checks being made to ensure that the provider is suitable and qualified to do so. Additional insurance cover may be required; schools should investigate the appropriate level of insurance required for their planned excursion through their Headteacher / Trust Office.

These trips will automatically be submitted to the LA for further approval and the Trust notified.

All schools within the Trust must:

- Obtain outline approval for the trip from the Headteacher and Trust Office prior to commitment of non-returnable funds;
- Brief parents and guardians fully on the proposed event and obtain specific consent
- Ensure that the school's EVC and Headteacher have considered the application for approval submitted on eVisits together with details of the proposed programme; specific risk assessment and any other relevant information and, if satisfied with the arrangements that they provide their approval;
- Ensure that submissions for approval are submitted 4-8 weeks in advance of the proposed event.
- Once approval has been granted ensure that details of the trip are submitted to Trust Offices

Adventurous activities both day/residential and both on/off site include:

Multi activities (from below)	Abseiling	Airborne: all types
Archery	Assault course	Bell boating
Bushcraft	Camping in wild country	Camping on campsites
Caving	Clay pigeon shooting	Climbing: indoor & outdoor
Coasteering	Cycling on tracks & roads	Dog sledging
Dragon boating	Field studies: natural envt.	Forest School
Free running	Go karting	Gorge walking
Ghyll scrambling	Hang gliding	Horse/pony riding
Hovercraft	Improvised rafting	Jet skiing
Kayaking	Kite surfing	Mine exploration

Motorised sports (all)	Mountain biking	Mountain boarding
Open canoeing	Orienteering	Paintballing
Paintballing	Pot-holing	Powered boats inc. safety
Ropes courses	Rowing	Sailing
Sand yachting	Scuba diving: lake & sea	Scuba diving: indoor pools
Segway	Shooting	Skateboarding
Skiing & snowboarding	Snorkelling	Surfing/body boarding
Swimming: not lifeguarded	Trampolining out of PE	Walking: hill & moorland
Walking: Lowland	Walking: Mountain	Water skiing
White-water rafting	Wind surfing/sailboarding	

### **Residential Trips Abroad**

All trips abroad require LGB Governor's permission. After permission has been granted, the Trust Office must be informed of details of the trip. At least 2 weeks prior to the trip, details must be shared with the Trust Office to include:

Details of:

- Flights/transportation details
- Location including contact details of hotel/hostel
- Details of Trip Agency used
- Number of pupils on trip
- Name and contact details of trip leaders and EVC
- Names and contact details of school staff not attending the trip who are 'on call' to support within the UK
- Insurance company details for the trip

### **Staffing**

The Trust recognises the key role of accompanying staff in ensuring the highest standards of learning, challenge and safety on a school visit.

All staff assisting and supervising during an educational visit will have been assessed competent to carry out the roles and responsibilities of a group leader.

The Trust does not normally support additional people accompanying educational visits who are not pupils at the school or part of the agreed staff complement. Exceptions may include family members accompanying visits if the Local Governing Body is satisfied that there is an educational benefit for the pupils. This must be detailed in a Pupil Specific Risk Assessment.

The appointed group leader will be fully supported in the tasks required to arrange the visit. This will include, as necessary, making time or finances available to conduct an exploratory visit, briefing teachers and other staff, accessing training courses, reviewing and evaluating the visit or identifying time when the group leader and Headteacher might work in partnership to undertake planning and risk assessments.

A sample risk assessment is attached in Appendix F.

## **Roles and Responsibilities**

### **Individual school EVC:**

- EVCs will have engaged with the one-day certified training (overseen and monitored by the Outdoor Education Adviser's Panel (OEAP));
- Check and approve all educational visits checklists and risk assessments for their school;
- Provide in-school training/briefings for all staff organising educational visits.

### **Group Leader:**

- The group leader is responsible for ensuring that all aspects of this policy are followed when organising an educational visit;
- The group leader will attend relevant meetings/training/briefings and liaise with the relevant EVC in order to ensure that the visit runs smoothly.
- Have undertaken visit leaders training to meet OEAP National Guidance for all trips (advisory) for 2b trips

### **Headteacher:**

- Ensure that all visits receive initial approval before any detailed arrangements are made;
- Ensure that all procedures in this policy are followed by appropriate staff;
- Ensure that staffing ratios and experience are appropriate for all educational visits.

### **Trust Board:**

- Receive information about residential trips abroad
- Ensure that the Trust's Educational Visits Policy is reviewed at least every Year;
- Ensure that the Trust educational policies and procedures remain up to date reflecting current Outdoor Education Advisers Panel (OEAP) guidance.

### **Chair of Governors (Local Governing Bodies):**

Scrutinise the details of any residential, adventurous or overseas educational visits before granting approval.

### **Parents:**

Parents have an important role in deciding whether any visit or off-site activity is suitable for their child. Parents should:

- a) Inform the group leader about any medical, psychological or physical condition relevant to the visit;
- b) Provide emergency contact numbers;

- c) Provide the group leader with arrangements to resume care of their child should this be necessary;
- d) Sign the consent form if in agreement.
- e) In the case of a Looked After Child, permission may need to be sought from Virtual Headteacher.

### **Remissions Policy**

Where non-chargeable education is provided during a residential visit, then the parents of pupils who are in receipt of the following state benefits for either the whole or part of the time spent on a visit shall receive a complete remission of any charges that would otherwise be payable in respect of board and lodgings:

- Income support;
- Family credit;
- Income based job seekers allowance;
- Disability working allowance.

Where charges are made by the Local Governing Body for optional extras, parents may apply for a remission for the whole or part of the charges set out in the school's remissions policy.

The school may ask for Voluntary Contributions. Parents should be made aware that the contribution is not compulsory, and that the children of parents who do not contribute may not be discriminated against. It is permissible to ask parents to contribute more than the minimum amount to subsidise those pupils whose parents have not contributed. In the last resort, the visit may have to be cancelled if there are not enough voluntary contributions and the shortfall cannot be made up (See Appendix J).

### **Code of Conduct - the expectations of Pupils and Parents**

Each school within the Trust has a clear code of conduct for school visits based on the schools' Behaviour Policy. This Code of Conduct will be part of the condition of booking by the parents, and include the potential of withdrawal of a pupil prior to and during the visit if such conduct would have led to a fixed term exclusion from school.

### **Emergency Procedures**

Each school will appoint a member of its senior leadership group as the emergency point of contact (EPOC) for each visit; this will usually be the school office during normal school hours and the Headteacher for out of normal school hours. All major incidents should immediately be related to this person, especially those involving injury or that might attract media attention. The Trust Executive Link should also be informed of any significant incidents.

The group leader will leave full details of all pupils and accompanying adults on the visit with the emergency point of contact via eVisits – full details can be uploaded as an excel spreadsheet, including the home contact details of parents/guardians and next-of-kin, as appropriate.

The group leader will take with them a copy of the Trust's Critical Incident/Emergency Plan.

All incidents and accidents occurring on a visit need to be reported back to the individual school's EVC, the Headteacher and the Trust Executive Link.

The Trust will have emergency funding available to support the group leader in an emergency.

The Trust has a Critical Incident Plan in place in the event of a critical incident this should be implemented immediately by the most senior member of staff available.

### **Evaluation**

The group leader with the Headteacher/EVC will evaluate all visits. A short evaluation report will be made available to the school's EVC and for the Local Governing Body on request.

The Headteacher and EVC will ensure that any risk assessments on the trip are dated as having been evaluated and/or modified and signed accordingly.

The group leader (with administrative assistance) is responsible for presenting a financial account for the visit, which will be audited as part of the Trust/school procedures.

### **Monitoring of visits as they take place**

From time to time a Trust or LA representative may attend a visit as it is occurring. This will be an opportunity to assess that visits are operating in accordance with procedures and details outlined within the approval process. Establishments will be contacted in advance of such a visit and will be informed of the format this will take and any review which will result as an outcome.

### **Visit Monitoring and Quality Assurance**

In order to comply with its obligations under health and safety law, as an employer, the Trust must monitor the delivery of its provision. This takes place via an annual programme of Quality Assurance in order that Trustees can be satisfied that all Trust schools are adhering to the statutory visit framework and guidance:

This takes three main forms:

1. Copies of all associated paperwork must be kept for each school visit;
2. For Category 2b visits and activities, the Trust and the LA will indicate approval of the information received on submissions, allowing events to proceed. For all such activities, establishments must ensure that they receive such approval prior to the visit taking place.
3. The Trust, or LA representative on invitation, may visit establishments to review planning arrangements for visits and approval systems developed on site, as well as risk assessments and other relevant systems and procedures. Trust schools will be contacted in advance of such visits and informed of the format this will take. This process is carried out by the Trust periodically and at least annually.

### **Policy Monitoring, Evaluation and Review**

The Audit & Risk Committee will review this policy at least every year and assess its implementation and effectiveness. The policy will be promoted and implemented throughout the Trust.

## Section 2

### Handbook for Group Leaders

#### Introduction

The purpose of this handbook is to provide practical information that might be helpful to group leaders and others, day to day, whilst taking part in an educational visit. It adds to and brings together in one place, the advice for group leaders that is spread throughout the Good Practice Guide "Health & Safety of Pupils on Educational Visits" (HASPEV).

The handbook is not a substitute for training. We recommend that all group leaders have access to training before taking pupils on educational visits. Recommended course is OEAP Visit Leaders – further details on courses being run can be obtained via EVC or LA Outdoor Education Advisor.

The handbook does not seek to replace local or other professional guidance or regulations.

The handbook includes advice on supervision, ongoing risk assessment, emergency procedures, and some specific types of visit.

#### Ratio Guidelines

Generally, ratios need to be higher off-site than they are in the classroom and supervision levels should be established via a risk assessment process. A minimum number of two teachers/adults of proven experience per group (or visit) is a good safeguard and in many circumstances essential.

Maximum ratios below are taken from the LA Visits Guidance Document and will be adhered to by all Trust schools:

**Nursery: ratio: 1 to 2** – one member of staff to every two participants

**Reception: ratio: 1 to 4** – one member of staff to every four participants

**School years 1 to 3 (ages 4 - 8 yrs.) ratio: 1 to 6 (overnight minimum 1 to 8)** - one member of staff or adult for every six participants (under-fives need higher ratios established via a risk assessment process) For overnights one member of staff to every eight participants

**School years 4 to 6 (ages 8 - 11yrs.) ratio: 1 to 15 (overnight minimum 1 to 10)** - one member of staff or adult for every 15 participants. For overnights one member of staff to every ten participants

**School year 7 onwards (ages 12 years and above) ratio 1 to 15** (overnight minimum 1 to 10) - one member of staff or adult for every 15 participants. For overnights one member of staff to every ten participants

**Residential visits – as for day visits plus a minimum of two members of staff are required on residential visits** - one professionally qualified member of staff or adult for every 10 participants. Mixed gender groups should have at least one male and one female member of staff.

**Visits abroad – as for day visits plus:** - a minimum of two professionally qualified members of staff

- one professionally qualified member of staff or adult for every 10 participants
- mixed gender groups should have at least one male and one female member of staff.

In many instances higher ratios of, for example, one teacher/adult to 10/12 pupils or less, will be appropriate. For young and special needs pupils, very high ratios through the support of parents and other adults is usually necessary and should be considered via a risk assessment process. If you are in any doubt, please contact the School EVC for advice.

The use of parents and volunteers can be considered as part of the staffing ratio for an off-site activity only when they have been adequately risk assessed and DBS obtained. All regular parents and volunteers must be DBS checked and inducted in relation to safeguarding. Check with the EVC prior to the off-site activity taking place.

### **Staffing**

On residential visits it is recommended that both male and female adults accompany any mixed party, although this can be waived with post-16 students as long as the parents are informed. Educational visits should be accompanied by a minimum of two adults, of which at least half must be employees of the school. Pupils cannot be included as adult escorts.

All visits involving an overnight stay should have at least one accompanying adult of the same gender as the students. Adults employed by the venue or an agency must not be counted when calculating adult pupil ratio.

It is good practice for female and male adult supervisors to accompany mixed groups of young people, and for overnight trips to be supervised by at least two adults to match the gender mix of the students. An improvement on these basic adult/pupil ratios and staffing may be required dependent upon the:

- Nature and location of the activity;
- Gender, ages, attitudes, disability, behaviour and competence of the group members;
- Duration of the activity;
- Weather conditions;
- Availability of prompt outside assistance;
- Type of accommodation;
- Experience and competence of the staff. (Inexperienced staff should be counted as group members).

The longer an activity or visit lasts, the more essential it is to have an adequate staffing ratio, and this should be considered when the risk assessment is prepared. This means that arrangements for supervision, including staff/pupil ratios, must take into account the nature of a group and the individuals in it. It is therefore important that, when planning a repeat visit or a series of activities, the previous plan (no matter how well it worked in the past) is reviewed to ensure it meets current group needs.

The use of non-teaching staff to supervise participants on visits must be based on their competence and eligibility to do so, the appropriateness of their inclusion and the level of responsibility that this may incur with regard to their contract of employment.

Supervision for the visit should be planned in advance and teachers and other adults who are supervising made aware of their role and responsibilities.

When appropriate, pupil lists should be provided for group leaders, if requested, however this information will be provided on the eVisits notification form online. Whilst rotas for those on duty may be established, all supervisors share responsibility for supervision throughout the visit and must accept at all times that their prime duty is to the pupils in the party. Pupils should not, routinely, travel to or from the place of a visit, or any point en route, unaccompanied by an adult, save in exceptional circumstances and only then with written parental consent and prior consent from the EVC.

Particular consideration should be given to arrangements for pupils return home at the end of a visit, particularly if this is after dark.

### **Transport**

When hiring coaches and minibuses, only to use reputable companies with vehicles fitted with appropriate seatbelts and to insist that all those participating in the visit wear them. A seat should be allowed for each member of the party. Pupils will not be transported in private cars, by either staff or parents.

Anyone driving a minibus for the school must meet the required standards. Minibuses should, ideally, have an adult supervisor in addition to the driver. For longer journeys, two drivers are recommended.

On coaches, there should be at least two adults, in addition to the driver. The staffing ratios should be used as a guide only, as the risk assessment will determine the ratios required.

School Staff are not permitted to use their own cars to transport children on visits unless prior approval is given by the Headteacher and they meet insurance regulations.

### **Inclusion**

The group leader will make every effort to ensure that **all** children are included on visits and journeys, including those with special educational needs, disabilities or other special conditions or circumstances. This may require additional adult support, increased staff to pupil ratio, adult training for specific medical conditions etc. The group leader will take all reasonable steps to ensure inclusion for all.

### **Funding and requesting parental contributions**

Funding for off-site activities is provided mainly by parental contributions (voluntary except in the case of residential visits). This must be made clear to parents in all correspondence about an educational visit at the planning stage. Further detail can be found in the School Charging and Remissions Policy. No child may be excluded from a visit taking place in school time because of the unwillingness or inability of the parent to make a contribution.

There are two types of financial contributions for which parents can be asked in relation to educational activities:

- Voluntary contributions;
- Permitted charges.

They have different limitations as set out overleaf.

### ***Voluntary Contributions***

There is no upper limit to the level of voluntary contribution that may be asked for or any restriction on the way in which it is used. Additional voluntary contributions above what are asked for by the school are welcomed. However, where a voluntary contribution is requested it will be equal to or less than the cost of the activity. Letters requesting a voluntary contribution for an activity must indicate that there is no obligation to contribute and that pupils will not be treated differently according to whether or not their parents have made any contribution in response to the request or invitation.

### ***Permitted Charges***

Permitted charges are a direct request to cover certain costs involved with a school activity or visit. No charge can be made in respect of education provided during school hours (which excludes the midday break). Furthermore, no charge can be made for any education provided outside of school hours if this forms part of the syllabus for a public exam, or as part of the National Curriculum or religious education (non-chargeable education).

A charge may be made however for board and lodgings on any residential educational visit as per the Trust's Charges and Remissions Policy.

### ***Costs***

The costing of off-site activities should include any of the following that apply:

- Transport;
- Entrance fees;
- Insurance;
- Provision of any special resources or equipment;
- Costs related to adult helpers;
- Food and refreshments;
- Accommodation;
- External providers;
- Additional administration costs.

The Trust follows all legal requirements about charging for visits. Where the visit takes place in school time, no charge will be made to parents, but they will be asked for a voluntary contribution. If the visit is not viable for financial reasons, it will not run and any money collected will be repaid. Where a visit takes place mostly out of school time, parents will be asked to pay.

## **Refunds**

All trips cancelled by the Trust/school will result in an automatic refund in respect of contributions received from pupils.

In the case of a student withdrawing from a trip, only valid insurance claims will be considered. A percentage refund may be offered in some cases (the % refunded decreasing as the departure date draws closer) when stated within the original letter as signed by the participating student's parent / carer.

## **Communication and Information to Parents/Carers**

Parents should be fully informed of arrangements and their written consent obtained. Pupils should be given comprehensive briefing and guidance and, in the case of on-going programmes, regular monitoring should take place.

When all the essential details of a visit are known it will be necessary to write to parents giving full information of the purpose and organisation of the visit to include:

- Dates and times
- Purpose and nature of activity
- Accommodation - address and telephone number
- Transport arrangements
- Emergency contacts and the procedure to be followed
- Staff and supervision
- Itinerary
- Insurance

## **Parental consent for educational visits**

The parents/carers of pupils taking part in an off-site activity will be provided with all appropriate information about the intended visit to make an informed decision.

Parents and carers should be informed of any educational visit in advance. Parental consent must be obtained each time a student takes part in a visit beyond a walking locality. **If no consent has been received, the pupil may not go on the visit.** Pupils who do not go on a visit should still attend school that day and be placed in another class. Trust schools will ask parents to sign a consent form (see Appendix I) when their child starts at the School that covers the following visits:

- Visits in the local area.
- Visits that do not involve travel by coach or public transport.

## **Parents' Meetings**

It is recommended that for most residential visits or visits of an unusual nature a parents' meeting should be arranged at an early stage to provide an opportunity to enlarge on the information given in writing and to answer questions. The meeting should precede the request for consent. This is considered good practice and is an opportunity for parents to meet adults accompanying the visit and to exchange information pertaining to the visit and the accompanying students.

Expectations of behaviour and codes of conduct will be explained to parents. This will include the need to meet the cost and make arrangements for collecting students in certain circumstances.

During residential visits, arrangements should be made for parents to contact the party in an emergency. Similarly, arrangements for afterhours contact from the party to the Headteacher or a representative of the senior management team should be agreed.

### **Pupil Briefing**

Pupils should understand the purpose of the visit which, by linking into the school curriculum, should have adequate curriculum preparation. Pupils and their parents should receive in writing necessary guidance regarding clothing, equipment, times and other practical matters.

All pupils should be appropriately briefed regarding safety, particularly in relation to any potential hazards associated with the venture and the standard of behaviour expected of them.

In a large party, each pupil should know which teacher is responsible for his or her group.

During residential visits it may be appropriate that each pupil carries the address and telephone number of the Centre, hostel or hotel at which they are staying

### **Equipment and Personnel for Visits**

The following items should be taken on all visits:

- A qualified First Aider if cover can be arranged;
- First Aid Equipment;
- Asthma inhalers;
- Prescribed medication;
- Sick bags;
- Mobile phone;
- Contact list for emergencies;
- Contact list for all students and adults in the party;
- A copy of the Critical Incident Policy;
- For residential visits, Calpol for children with permission slips.

***(Parental consent required before administering)***

Group leaders should conduct a final check, before departure, to ensure that all pupils have the necessary emergency contact telephone numbers, clothing, equipment, food and other essentials.

### **Mobile Phones**

Many leaders now carry a mobile phone to save time in the event of an emergency. While it may be a useful item of additional equipment, technical difficulties arise easily especially in mountainous areas and when batteries cannot be recharged. Their use, therefore, should complement and not replace traditional safety and communication procedures. It is also likely that many young people will carry mobile phones, teachers will need to include

in their briefing their expectations around mobile phone usage in accordance with their destination.

## **Risk Assessments**

A comprehensive risk assessment (including specific risk assessments for pupils with additional needs) must be carried out before the proposed visit, adding detail to the generic documents. This must assess risk which might be encountered on the visit and should indicate measures to prevent or reduce them. The assessment must be based on the following considerations:

- What are the hazards?
- Who might be affected by them?
- What safety measures are needed to reduce the risks to an acceptable level?
- Can the safety measures be put into place?
- What steps will be take in an emergency?

A preliminary visits to the venue should be taken where possible, in order to carry out an on-site assessment. It is important to take into account the probable weather conditions at the time of the year and a careful account of the facilities available, with due regard to the proposed number of students participating in the activity. It is important to assess any Health & Safety or security issues and take measure to eliminate or reduce them

***Visits will not be allowed to go ahead without a completed, written Risk Assessment.***

Copies of risk assessments are kept by the school's EVC on file for reference and must be signed and dated by the group leader. The risk assessment must be signed by the school's EVC as acceptance that they have checked and approved the visit risk assessment detail.

On conclusion of the visit, the risk assessment should be reviewed and, if necessary, amended for future reference.

The group leader must complete these assessments along with the staff team. The assessments relate to the hazards associated with the event or site and the nature of the children and young people in the party. This may require a site visit in order to fully appreciate how to write the risk assessment.

Blank risk assessment forms and guidance on their completion can be requested from the EVC (see Appendix H).

***Important Note: It is important that generic risk assessments, associated checklists and protocols are used carefully. There must be evidence that those undertaking the visit have read them and applied them appropriately to the visit. Whenever they are used, the EVC should check and sign to this effect.***

## **Third Party Providers**

Other people and organisations provide many aspects of educational visits for schools. Examples include outdoor centres, transport providers, voluntary organisations and

museums. It is the responsibility of these organisations to assess the risks of their provision.

***Important note: It is not necessary to copy or scrutinise all providers' risk assessments, just a verification that they do exist for the agreed visit. This at its simplest will be a written confirmation:***

***"Can you confirm that you have assessed the risks for our programme?" and "How can you verify this?" The answer to the latter could be "they are published on our website "; "they are available to you in the visitors' handbook". They must be accessible to the school.***

## **Contact Arrangements and Information required for School**

### **Emergency Point of Contact**

**For visits during the school day the group leader must ensure that:**

- A list of all staff/students on the visit is given to the office for lesson monitor to be completed;
- Alternative arrangements have been made for those pupils not going on the visit;
- A mobile telephone (switched on where practical) is with the group leader and the number is left with the school office.
- They hold emergency contact details for all staff/students.

**For visits out of school time the group leader must ensure that:**

- A list of all staff/students on the visit is with a named contact person;
- A procedure for emergency contact is approved by the EVC and Headteacher;
- They hold emergency contact details for all staff/students;
- A list containing all staff mobile telephone numbers are available for the Senior Leadership Group contact;
- A mobile telephone number is available for the senior leadership group contact.

### **Insurance Cover and Student Contributions**

All Trust schools are members of the Risk Protection Agency (RPA). Staff organising visits will need to check with the school or EVC that school insurance fully covers activities being carried out as part of each visit planned. All trips within the United Kingdom are covered by the Risk Protection Insurance Policy.

It is expected that in calculating the cost of a trip a contribution is included towards this policy, this being 50p non-residential and £1 residential per pupil, per visit.

The group leader must carry a copy of this policy during the trip (obtained from Trust Office).

Parents/guardians must inform the school immediately if their child is unable to travel on medical grounds.

The Trust Office must be notified of all insurance claims.

## **Health & Safety, First-Aid and Administration of Prescribed Drugs**

All leaders should have a working knowledge of first-aid, and one person accompanying the visit must have a valid first aid certificate relevant to the trip (unless otherwise advised to parents). They should carry a first aid kit appropriate to the activity and all staff should be aware of its contents and how they should be used. Staff on more advanced outdoor activities or those in remote areas will need to consider whether they are appropriately qualified and equipped to deal with emergencies.

Teachers and staff should be aware that no drugs, other than those prescribed by a physician, may be administered to a pupil. During visits, safe arrangements should be made for the control and administration of prescribed drugs to pupils, on the basis of written instructions from parents and agreement on appropriate action by the staff responsible for pupils. Please refer to the Trust/School Health and Safety Policy and ascertain the school's procedure for administering medicines.

## **Emergency Procedures and Reporting of Accidents**

Group leaders should be prepared for emergencies and be able to make an on-the-spot response to accidents. In the event of a serious accident, leaders should:

***Take charge of the situation – ensure safety and well-being of the whole group. Make sure that all members of the party are accounted for.***

### **In the event of an accident:**

- Attempt to park in a safe place;
- Keep the passengers in the vehicle unless they are at risk by doing so. On a motorway students should be taken away from the road;
- Note the precise location;
- Assess the situation and report the details to school as soon as possible;
- An adult must stay with the students at all times;
- All educational visit staff must carry a copy of the procedure to be followed in the event of a disaster on an educational visit.

On return to the school, the group leader must comply with the Trust's normal accident reporting procedures.

## **Injuries**

- Assess the injured without injury to yourself;
- Only attempt First Aid if qualified;
- Reassure and protect the casualty from further harm;
- Send for help - dial 999 and give the following information:

**The location**

**Details of casualties, age, condition**

**Phone number**

## **Delays**

If delayed contact the school at the earliest possible opportunity and proceed at a safe speed.

## **Group Leader's Final Check**

Group Leaders are advised to complete a mental or written checklist before departure. This checklist will form part of the monitoring and quality assurance process. The following may be included.

1. List of pupils
2. Weather forecast
3. Final numbers check
4. Curriculum work
5. Plans for visit, route cards etc.
6. Clothing and equipment
7. Consent forms
8. Emergency contact numbers
9. Money, tickets, accommodation details etc.
10. Catering supplies, food and drink
11. First Aid kits
12. Insurance document details.

## **Returning Staff to Work**

Staff planning on returning to work fewer than 8 hours post trip to liaise with the Headteacher and EVC as to return to work time.

## **Post Trip Evaluation**

All group leaders must complete a post trip evaluation (including accidents, incidents, near misses, medications dispensed, changes to accommodation or sleeping arrangements and unsupervised access to children by adults).

The Educational Visits and Journeys Policy has been adopted by the Board of TrustEd Schools Alliance

**Educational Visits Proposal**

<b>Faculty</b>	<b>Visit Organiser</b>	<b>Proposed Date of Visit (give month if not available at this stage)</b>	<b>Year Group(s)</b>	<b>Number of Expected Pupils</b>	<b>Did this visit run last year YES / NO*</b> <small>*Please delete as appropriate</small>	<b>Proposed Staff Numbers</b>	
<b>Subject (if different)</b>						<b>Teachers</b>	<b>Support Staff</b>
<b>Please outline details of visit (where, why, cost (indicate whether from parental contributions/faculty capitation or request for school subsidy) etc.):</b>  <div style="border: 1px solid black; height: 150px; margin-top: 5px;"></div>							
<b>Headteacher's Comments:</b>  <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <span><b>Approved in Principle: Yes / No</b></span> <span><b>Signed:</b></span> <span><b>Date:</b></span> </div>							

**Visits directly linked to the curriculum must be open to all students.**

**Educational Visits Form for Approved Visits**

Please complete this form for all school visits or off-site activities and return this to the Educational Visits Co-ordinator at least six weeks before a one day trip and at least one full term in advance of a residential/overseas trip.

**Please attach a copy of the relevant Risk Assessment(s)**

Name of Visit Organiser:		School:	
		Date form submitted:	
Date of Visit:	Departure Time:	Return Time:	
Visit to:			
Year Group:	Faculty/Subject :		
Is this trip a: Local one day visit / Adventurous / Residential / Overseas visit *Delete as applicable			
Category of Trip: A / B / C *Delete as applicable			
Brief Outline of Visit to include any activities which will be undertaken by the group.			
Objectives of Visit:			
Pre-Trip Visit undertaken:			
Any Significant hazards or Concerns:			
Total number of students M/F ratio	Male:	Female:	
Number of adults / proposed names	Male:	Female:	
Name of First Aider accompanying visit:			
<b>COSTS</b>			

**COACH COMPANIES TELEPHONED FOR COSTS :( You can ask for assistance with this by contacting a member of the School's Finance Team.**

NAME OF COMPANY	DATE TELEPHONED	COST (please attach copies of quotations)

**COACH COMPANY CONFIRMED:**

NAME	DATE CONFIRMED	HOW PHONE/WRITING?

Coach /Transport Costs		
Minibus Driver Costs (if applicable)		
Admission/Entrance Fees		
Flight/Ferry Costs		
Insurance Cost		
Other projected costs (e.g., photocopying, ski-lessons, food cover) - include rates		
Accommodation Costs		
Contingency		
Off-site insurance (50p per head day trip, £1 overnight)		
TOTAL COST OF TRIP		
<b>TOTAL COST PER STUDENT</b>		

**STUDENT FREE LUNCHES**

FREE LUNCHES		DATE AND MEMBER OF SCHOOL KITCHEN STAFF NOTIFIED OF INFORMATION	
NUMBER REQUIRED			
		Signature	Date
EVC Approval			
EVC Comments			
What type of approval does this visit require? Local / County * Delete as appropriate			
Headteacher's Approval:			
Headteacher's Comments:			

**On completion of all above sections the EVC will pass copy of this form back to the Group Leader for their records. A copy of this form will also be retained by the FINANCE OFFICE for costing purposes and the EVC for the school records.**

**Procedure to be followed in the Event of a Disaster on an Educational Visit**

1. Establish the nature and extent of the emergency (contact the emergency services).
2. Make sure all other members of the party are accounted for and are safe.
3. If there are injuries, establish their extent and administer appropriate first aid if you have been trained and feel capable. Have regard to your own safety.
4. Advise other party staff of the incident and of the actions taken. Decide, if appropriate, particular responsibilities to be undertaken by each adult member of the group.
5. If possible, ensure that an adult accompanies any casualties to hospital.
6. Ensure that remaining students are adequately supervised and arrange for an early return to base.
7. Arrange for one adult to remain at the site of the incident to liaise with the emergency services until the incident is over and all students are accounted for.
8. Contact the Headteacher or the member of staff on call. Control access to telephones until the senior member of staff has contacted parents/others directly involved. Give full details of the incident including:
  - a) nature, date, location and time of incident;
  - b) details of injuries etc;
  - c) names and if possible home telephone numbers of those involved;
  - d) action taken so far;
  - e) telephone numbers for future communication;
  - f) Do not discuss matters with the media.
9. If a member of the Senior Management Team has been contacted he/she should contact the Headteacher and establish who will take charge of the situation and what immediate action will be taken. The Headteacher will contact the CEO if appropriate.
10. The party leader should, at the first opportunity, make notes on the incident, as should other people involved.
11. A record should be kept of the names and addresses of any witnesses or people involved.
12. Do not discuss legal liability.
13. Ensure accident forms are completed as soon as possible.
14. Inform parents of any delays that will be necessitated, or ask a member of the Senior Management Team to do this.

### **Procedure note for international/residential/day trips**

These summary guidelines should be read in-conjunction with the Educational Visits and Journeys Policy.

Teachers organising any trip must receive prior approval from the Headteacher for the trip to take place. Competent staff to lead and help with the trips will also be approved at this stage which should include **one First Aid trained person.**

### **Educational Visit Co-Ordinator's Responsibilities (EVC)**

In conjunction with the Teacher organising the trip, the EVC will ensure the following action is taken:

1. A letter to be sent to parents explaining the details of the trip i.e. venue, date, times of departure and arrival and cost.
2. When the list of pupils going on the trip has been produced, the teacher in charge of the trip will approve their attendance with advice from the Headteacher / EVC /Medical Conditions Co-ordinator before a letter is sent to parents with information about payment details and dates when monies need to be in for.
3. A class list is produced with the pupils' names, forms, payment details and paperwork received which is completed each time a payment is given in (also recorded is the date and method of payment). Payment cards will also be produced at this stage for parents to pay in instalments.
4. Dependant on the time available before a trip takes place, a fortnightly catch-up meeting should take place between the teacher organising the trip and the EVC to receive up-dates on outstanding payments, indemnity forms and travel arrangements.
5. School trip payments are processed by the School Finance Office. Each student on the trip will be provided with a receipt and/or payment record.
6. Before each trip takes place the approval forms need to be completed. The teacher who is organising the trip is required to complete these and pass to the EVC who will ensure that these are then sent to the Headteacher for authorisation.
7. In the case of residential or international trips a letter is sent to parents inviting them to a meeting to discuss final details. This is arranged approximately three weeks before the trip is to take place. A list is given to the teacher in charge of the trip and any outstanding indemnities, European Health Insurance Cards (EHIC), passports or payments can be collected at the meeting.
8. When EHIC cards are collected the dates need to be checked to make sure they are still in date. If they are not a telephone call is carried out to parents

**Appendix D  
continued**

informing them of this and the procedure they need to carry out in order to renew it. This must also be carried out on passports and a call to the country's Embassy needs to be made if there is less than six months left to run on the passport to ensure that this will be sufficient.

9. At least one member of the Senior Leadership Group (SLG) will be designated to each international/residential trip in case of emergency and the visit will be approved by an external advisor.
10. Packs are produced for the designated SLG member(s) containing copies of the indemnity forms, next of kin details for the staff who are going on the trip along with a mobile phone number, spreadsheet of essential information regarding the students on the trip and any allergies or medication which the students may have. A pack is also produced for the teacher in charge containing the same information along with a copy of the School Journey Guidance and current insurance certificate.
11. Dependant on the activity taking place, an appropriate First Aid kit must be taken on all trips.
12. These guidelines have been produced as the Trust considers its responsibility for the safeguarding of children engaged on trips to be of paramount importance. Therefore, failure to adhere to these guidelines could lead to investigation and possible disciplinary action.

**Staff Declaration**

I confirm that I have read and understood this policy prior to my participation in an offsite educational visit.

Name:..... (PRINT)

..... (SIGNATURE)

Date:







**Educational Visits: Sample risk assessment for use of Minibus**

<b>HAZARDS</b>	<b>CONTROL MEASURES</b>	<b>ADDITIONAL INFORMATION</b>
Road traffic Accident	LEA guidelines on transport to be followed. A minimum of two adults per vehicle – one driving, one supervising	Drivers and escorts (supervisors) on a minibus to be given a copy of appendices 2, 3 & 4 of the ROSPA: Minibus Safety – A Code of Practice. March 2002 (attached) Driver only 15 Year 10 students low risk
Vehicle breakdown	Ensure vehicle is roadworthy and meets all legal criteria	Vehicle checked and AA breakdown cover current
	Daily check of vehicle All drivers should familiarise themselves with the vehicle prior to transporting a group of children	Daily check will be completed by
Accident caused as a result of moving around the vehicle	Seat belts to be worn at all times	Students to be briefed on use of seatbelts
Lack of experience / knowledge of minibus driving & passenger management resulting in accident	Minibus driver to meet following minimum criteria: <ul style="list-style-type: none"> <li>• Be in possession of a valid driving licence</li> <li>• Be medically fit to drive</li> <li>• Be trained &amp; assessed as competent in minibus driving and passenger management</li> <li>• Comply with recommended driver rest breaks</li> <li>• If driving under a section 19 small bus permit be a minimum of 21 years of age and have held a full licence for at least 2 years</li> </ul>	Driver (Insert name) possesses current LEA minibus permit.
Loading and embarkation	Driver to brief students on loading and embarkation and to park appropriately to prevent students alighting into traffic flow.	

**RISK ASSESSMENT REVIEWED BY:**

**NAME OF SCHOOL:**

**DATE OF VISIT:**

**DATE OF REVIEW:**

Source document: ROSPA: Minibus Safety – A Code of Practice March 2002.

**Advice for Minibus Drivers**

**On journeys where an escort is present, the items below should be divided between the driver and escort, with the driver concentrating on those tasks which directly relate to driving the vehicle.**

**Before Setting Off**

<ul style="list-style-type: none"> <li>• Allow sufficient time for the journey</li> </ul>	<ul style="list-style-type: none"> <li>• When school bus signs are used, make sure they are in position only while children are being transported, and that they do not obstruct your vision.</li> </ul>
<ul style="list-style-type: none"> <li>• Avoid long spells of driving, and plan breaks to ensure you are fresh to continue and that children do not get restless</li> </ul>	<ul style="list-style-type: none"> <li>• Always ensure that ambulant disabled passengers are seated safely and comfortably and that passengers travelling in their wheelchairs are safely restrained. Wheelchairs not in use must also be securely stored.</li> </ul>
<ul style="list-style-type: none"> <li>• Conduct a pre-drive safety check before every drive</li> </ul>	<ul style="list-style-type: none"> <li>• Make sure there is a complete list of passengers being carried with a note of any special medical or other needs. Keep the list with other relevant documents in a place where it can be readily found in the event of an accident. Check that children have any necessary medication with them</li> </ul>
<ul style="list-style-type: none"> <li>• Never allow passengers to board until the vehicle is at a complete standstill, and safely parked by an adjacent pavement or other traffic-free area. If you need to leave the vehicle, switch off the engine</li> </ul>	<ul style="list-style-type: none"> <li>• Take care when using passenger lifts and other specialist equipment. Always comply with the manufacturer's instructions.</li> </ul>
<ul style="list-style-type: none"> <li>• Passengers should enter the minibus from the pavement adjacent to the bus, not from the road itself (unless using a ramp or lift at the rear). If driving abroad, the nearside door may open onto the road, and therefore, extra care will be needed.</li> </ul>	<ul style="list-style-type: none"> <li>• Check that no bags or clothing are caught in the doors, and check all mirrors every time before moving away in case latecomers are approaching the vehicle.</li> </ul>
<ul style="list-style-type: none"> <li>• Ensure that children are supervised when boarding the vehicle, especially if they are using a rear door. Plan which passengers will sit in the front seats and by the doors.</li> </ul>	<ul style="list-style-type: none"> <li>• Check that all luggage is secured, and that gangways and exits are clear.</li> </ul>
<ul style="list-style-type: none"> <li>• Do not exceed the carrying capacity of the minibus. Make sure everyone is sitting, one to a seat, and that passengers are using seat belts</li> </ul>	<ul style="list-style-type: none"> <li>• Know the height, width, length and weight of the vehicle, and the position of the exterior fuel cap.</li> </ul>

**During the journey**

<ul style="list-style-type: none"> <li>Do not allow noisy or boisterous behaviour, or passengers to trail flags or any other article from the vehicle.</li> </ul>	<ul style="list-style-type: none"> <li>If you have to stop for an emergency breakdown whilst on the motorway, only stop on the hard shoulder, and as far away from the carriageway and passing traffic as possible. Again, ensure that passengers, especially children, remain together and are supervised.</li> </ul>
<ul style="list-style-type: none"> <li>Enforce a 'No Smoking' rule.</li> </ul>	<ul style="list-style-type: none"> <li>If requested by the police, or any other person having reasonable cause, give particulars of the driver's name and driving licence, and the name and address of the minibuss operator or owner.</li> </ul>
<ul style="list-style-type: none"> <li>Enforce a 'No Alcohol' rule.</li> </ul>	<p><b>At the End of the Journey</b></p>
<ul style="list-style-type: none"> <li>Do not allow child passengers to operate the doors, and supervise any operation of the doors by responsible persons.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that children are supervised when leaving the vehicle, especially if they are using a rear exit.</li> </ul>
<ul style="list-style-type: none"> <li>Approach each stop slowly and with care.</li> </ul>	<ul style="list-style-type: none"> <li>Never allow passengers to leave until the vehicle is at a complete standstill, and safely parked by an adjacent pavement or other traffic-free area, and the hand brake is engaged.</li> </ul>
<ul style="list-style-type: none"> <li>Use hazard warning lights on school trips when children are boarding or leaving the vehicle.</li> </ul>	<ul style="list-style-type: none"> <li>Always park so that passengers step onto a footway and not onto the road.</li> </ul>
<ul style="list-style-type: none"> <li>If there is a serious delay during the journey inform the school or organisation so that information may be passed to parents. A mobile telephone is very useful for this purpose, but must not be used by the driver while driving.</li> </ul>	<ul style="list-style-type: none"> <li>Take particular care when reversing the vehicle if children are nearby. Avoid unnecessary reversing but if it is unavoidable, seek adult assistance for direction, and ensure the assistant does not stand directly behind the vehicle.</li> </ul>
<ul style="list-style-type: none"> <li>Children must not be left unaccompanied in the minibuss (this is another reason for having an escort).</li> </ul>	<ul style="list-style-type: none"> <li>Do not leave children alone if no one has arrived to collect them. Ensure you know what to do if a child is not collected.</li> </ul>
<ul style="list-style-type: none"> <li>If the vehicle breaks down, or if there is an accident, give clear instructions to the passengers and see that children remain together and supervised: their safety is paramount.</li> </ul>	<ul style="list-style-type: none"> <li>Report any problems or incidents that occurred during the trip to the operator.</li> </ul>
<ul style="list-style-type: none"> <li>If there is a risk of fire, however small, evacuate the vehicle and move the occupants to a safe place.</li> </ul>	

**The Duties of an Escort – Advice for Operators**

<ul style="list-style-type: none"> <li>Supervise the passengers when boarding or leaving the vehicle, taking particular care if they are leaving by the rear exit. If driving abroad in a country that drives on the right, be aware that some doors may open onto the roadside.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that all luggage is securely stored and that all gangways and exits are kept clear.</li> </ul>
<ul style="list-style-type: none"> <li>Check that no passenger boards or leaves the vehicle until it is at a complete standstill, and safely parked by a pavement or other traffic free areas.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that when passengers are dropped off, they leave the vehicle safely; that no parts of their clothing are caught in the vehicle's doors; that there is someone to meet them (a parent or guardian or carer in cases of children and/or persons with disabilities).</li> </ul>
<ul style="list-style-type: none"> <li>Ensure the driver does not move away until everyone is safely seated, facing the front and wearing a properly positioned and adjusted seat belts (if fitted), or using a securely fixed and properly adjusted special harness, seat or child restraint if appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that children are never left unsupervised in the minibus, or if the vehicle breaks down.</li> </ul>
<ul style="list-style-type: none"> <li>Check that ambulant disabled passengers are seated safely, passengers travelling in wheelchairs are safely secured and wheelchairs not in use are securely stored.</li> </ul>	<ul style="list-style-type: none"> <li>Only operate the passenger lift and other specialist equipment if trained and qualified to do so.</li> </ul>
<ul style="list-style-type: none"> <li>Ensure that passengers behave in an acceptable manner during the journey and do not distract the driver in any way. Boisterous play must not be allowed; neither must smoking nor drinking alcohol. Passengers must remain seated and wearing their seat belts (if fitted) throughout the journey.</li> </ul>	<ul style="list-style-type: none"> <li>Keep a complete list of the passengers, including details of any special needs, and ensuring that all passengers have returned to the vehicle after any rest stops.</li> </ul>
	<ul style="list-style-type: none"> <li>In the event of a breakdown or accident, ensure that children remain supervised, are given clear and firm instructions and if necessary, help in evacuating the minibus.</li> </ul>
	<ul style="list-style-type: none"> <li>Help to direct the vehicle if the driver needs to reverse but do not stand directly behind the vehicle out of the driver's sight. Children must <b>never</b> direct a reversing vehicle.</li> </ul>

**Advice for Escorts on Minibuses**

<b>Before Setting Off</b>	<ul style="list-style-type: none"> <li>Enforce a 'No Alcohol' rule.</li> </ul>
<ul style="list-style-type: none"> <li>Reserve the most appropriate seat for yourself to allow you to supervise the passengers.</li> </ul>	<ul style="list-style-type: none"> <li>Do not allow passengers to operate the doors, unless supervised.</li> </ul>
<ul style="list-style-type: none"> <li>See that the children are supervised when boarding the vehicle if they are using a rear door.</li> </ul>	<ul style="list-style-type: none"> <li>If there is any serious delay during the journey inform the school or organisation so that information may be passed to parents. A mobile telephone is very useful for this purpose.</li> </ul>
<ul style="list-style-type: none"> <li>Never allow passengers to board until the vehicle is at a complete standstill, and safely parked by an adjacent pavement or other traffic-free area.</li> </ul>	<ul style="list-style-type: none"> <li>Children must not be left unaccompanied in the minibus.</li> </ul>
<ul style="list-style-type: none"> <li>Always ensure that ambulant disabled passengers are seated safely and comfortably and that passengers travelling in their wheelchairs are safely restrained.</li> </ul>	<ul style="list-style-type: none"> <li>If the vehicle breaks down, or if there is an accident, give clear instructions to the passengers and see that children remain supervised: their safety is paramount.</li> </ul>
<ul style="list-style-type: none"> <li>Ensure that any wheelchairs, and other equipment, not in use are securely stored.</li> </ul>	<ul style="list-style-type: none"> <li>If there is a risk of fire, however small, evacuate the vehicle and move occupants to a safe place.</li> </ul>
<ul style="list-style-type: none"> <li>Make sure there is a complete list of the passengers being carried with a note of any special medical or other needs. Keep the list with other relevant documents in a place where it can be readily found in the event of an accident.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that litter is disposed of carefully (in a litter bag or bin) as cans rolling around the floor can be distracting.</li> </ul>
<ul style="list-style-type: none"> <li>Check that all luggage is secured.</li> </ul>	<b>At the End of the Journey</b>
<ul style="list-style-type: none"> <li>Check that no bags or clothing are caught in the doors; check all mirrors every time before moving away in case latecomers are approaching the vehicle.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that children are supervised when leaving the vehicle, especially if they are using a rear exit.</li> </ul>
<ul style="list-style-type: none"> <li>Take care when using passenger lifts and other specialist equipment. Always comply with the manufacturer's instructions.</li> </ul>	<ul style="list-style-type: none"> <li>Never allow passengers to leave until the vehicle is at a complete standstill, and safely parked by an adjacent pavement or other traffic-free area.</li> </ul>
<b>During the Journey</b>	<ul style="list-style-type: none"> <li>Do not leave children alone if no-one has arrived to collect them.</li> </ul>
<ul style="list-style-type: none"> <li>Do not allow noisy or boisterous behaviour</li> </ul>	<ul style="list-style-type: none"> <li>If necessary, assist the driver to reverse the vehicle. Never allow a child to do this. Do not stand directly behind the vehicle while it is reversing.</li> </ul>
<ul style="list-style-type: none"> <li>Try to keep the children occupied –the journey will seem much quicker.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that passengers take all their personal belongings with them.</li> </ul>
<ul style="list-style-type: none"> <li>Enforce a 'No Smoking' rule.</li> </ul>	

**Risk Assessment and Management**

**Activity:** \_\_\_\_\_

**Date of assessment:** \_\_\_\_/\_\_\_\_/\_\_\_\_.

**Date of Review:** \_\_\_\_/\_\_\_\_/\_\_\_\_.

**Risk Rating Key**

**Severity:**

Fatality or debilitating injury = High

Major Injury = Medium

Minor Injury = Low

**Likelihood:**

Probable = High Occasional = Medium

Improbable = Low

Hazards/Risks (identifying groups affected)	Potential Severity	Working Procedures Risk Control	Likelihood of Occurrence	Risk Rating	Monitoring Required

**Assessment led by:** \_\_\_\_\_

**Page** \_\_\_\_ **of** \_\_\_\_

<b>Hazards/Risks</b> <b>(identifying groups affected)</b>		<b>Potential</b> <b>Severity</b>	<b>Working Procedures</b> <b>Risk Control</b>	<b>Likelihood of</b> <b>Occurrence</b>	<b>Risk</b> <b>Rating</b>	<b>Monitoring</b> <b>Required</b>
<b>Page ____ of ____</b>						

<b>Hazards/Risks</b> <b>(identifying groups affected)</b>		<b>Potential Severity</b>	<b>Working Procedures Risk Control</b>	<b>Likelihood of Occurrence</b>	<b>Risk Rating</b>	<b>Monitoring Required</b>
Page ____ of ____						

**Example text for a Parent Consent Form: general/annual basis for visits undertaken on foot in the immediate locality**

To be sent out on individual school's letter headed paper.

Date

Dear Parent/carer,

(Insert name) school recognises the importance of out-of-class learning and will from time to time arrange visits to locations close to the school to support the curriculum and to enhance the learning opportunities for your child.

Examples of these visits may include (although not exhaustive), trips to local museums, places of religious worship and libraries, taking part in shopping surveys in the local area or a trip to the park or a local book store.

We will:

1. Notify parents by letter of any visit that has been arranged for your child's class.
2. Ensure that our adult leaders are adequately trained to supervise groups off the school site.
3. Comply with Trust regulations for the organisation of such visits.
4. Be clear about the educational value and importance of the trip to your child.
5. Advise you in advance of any voluntary contribution needed to support the trip.
6. Seek your permission for your child's involvement in these visits on an annual basis.

Please note that visits that require transportation, over-night accommodation or have an element of adventurous activity will require a separate permission slip.

Please read the following statement and sign and date the form and return to your child's class teacher as soon as possible.

"I have read and understood the contents of this letter, and am happy for my child to take part in educational visits organised by (insert name) school. I agree for my child to leave the school site on such visits.

Name of pupil: \_\_\_\_\_

Name of parent: \_\_\_\_\_

Signature of parent: \_\_\_\_\_

Date: \_\_\_\_\_

**Example text for a Parent Consent Form: individual trip for a visit undertaken at some distance from school requiring transportation and / or which has some element of adventurous activity.**

To be sent out on individual school's letter headed paper.

Date

Dear Parent/carer,

Field Study Trip 26 – 28 January 20xx

The Year 11 Field Trip to How Hill Study Centre Ludham will take place from Monday 26 to Wednesday 28 January 2016. The visit will include adventure and recreational activities using the space and facilities at How Hill. There will be chances for exciting and challenging work and activities and the week forms part of the year group classroom work.

**A voluntary contribution of £..... is requested to help cover the cost of this school visit: if insufficient contributions are received the school will need to cancel the visit.**

**Please note that deposits for residential trips (cost of day visits) are non-refundable except in exceptional circumstances.**

All monies for the trip should be handed to Reception (not during lesson time) along with completed reply slip by (insert date) The preferred method of payment is by cheque. Cheques should be made payable to (insert name of school) with the pupil's name, written on the back of the cheque. If you require a receipt for payment, please indicate at time of payment.

A Parental Consent form and Images Consent form must be completed on behalf of your child in order for them to participate in this visit. If you have not yet completed and returned these forms, your child can still collect them from Reception.

Yours sincerely, .....

To be returned to your child's Class Teacher by 23 October 20xx

Year 11 Trip to How Hill – Monday 26 – Wednesday 28 January 200xx

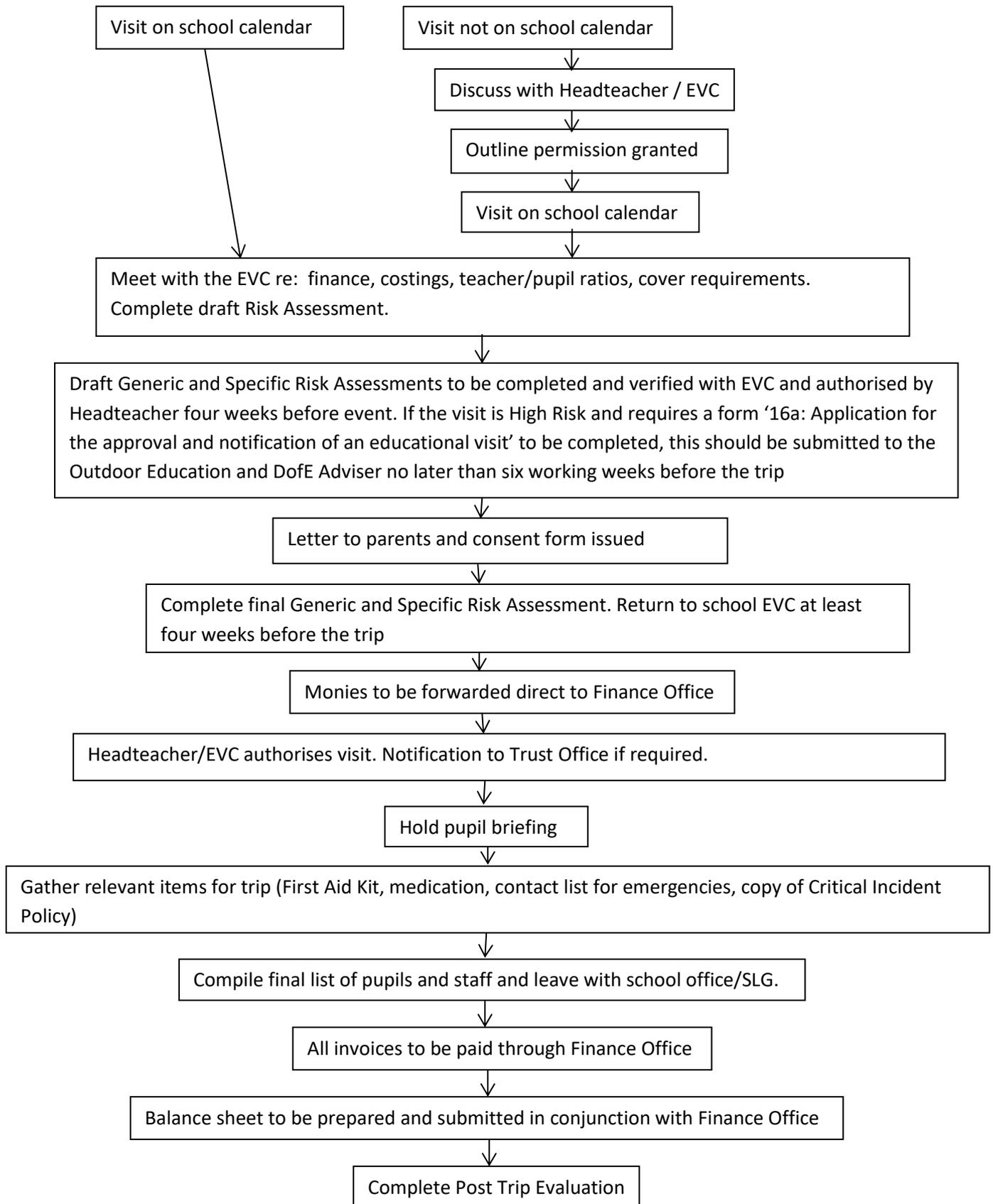
Child's name ..... Class .....

- I would like my child to go on the field trip to How Hill
- I enclose £100 voluntary contribution
- I enclose £20 deposit (balance in instalments by (insert date))
- I will be attending the parents briefing on (insert date)

Parent/Carer ..... Date .....

### **Guidance Notes for Staff on School Remissions and Charging Policy**

1. National guidelines state that during directed teaching time a school may not charge for an activity including off-site educational visits. Pupils may be charged for activities outside directed time, including after school clubs, evenings and weekends.
2. Schools may request for voluntary contributions to fund off-site educational visits during directed time. It is the visit leader's responsibility to ensure that the visit is financially viable from these voluntary contributions. This will include an estimate of how many pupils may not be able to offer a contribution. Requests may also be made to the individual school's Headteacher for a subsidy from school funds. This **MUST** be done in advance of the trip.
3. Pupils who are in receipt of free school meals may not be charged for the catering and accommodation element of a residential trip.
4. Schools may not profit from off-site educational visits over the year, but can carry forward surpluses from one visit to the next.
5. Parental consent forms must state that the contribution is voluntary, but should also make clear that if insufficient contributions are forthcoming the school may need to cancel the visit for all the children. We cannot prevent a pupil from attending a visit due to financial grounds.
6. All letters to parents regarding an educational visit **MUST** carry the following statements... "A voluntary contribution of £..... is requested to help cover the cost of this school visit, if insufficient contributions are received the school will need to cancel the visit." "Deposits for residential visits (cost for day visits) are non-refundable except in exceptional circumstances."

**Visits Procedures Summary**

**Summary Balance Sheet**

To be completed by School Finance Office

Name of school:

Date of visit/trip:

Department:

Group Leader:

<p><b>MONIES COLLECTED:</b></p> <p>.....of pupils @..... = £.....</p> <p>.....of pupils contributing = £ .....</p> <p><b>TOTAL COLLECTED: £ .....</b></p>	<p><b>PAYMENTS AND EXPENDITURE</b></p> <p>Coach hire:</p> <p>Coach insurance:</p> <p>Entry ticket costs:</p> <p>Offsite insurance costs:</p> <p>Accommodation costs:</p> <p>Food/refreshments/catering:</p> <p>Equipment hire:</p> <p>Miscellaneous expenditure:</p> <p><b>TOTAL COST INCURRED: £ .....</b></p>
<p><b>NUMBER OF PUPILS NOT CHARGED:</b></p> <p>..... PUPILS @ .....= £ .....</p> <p><b>TOTAL SHORTFALL = £ .....</b></p>	

I certify that the above statement is a complete summary of the financial transactions relating to the above visit.

I have inspected the above summary and have verified the figures from the supporting records and School Fund cash book/ledger folio.

Date:

Date:

Signature:  
Group Leader

Signature:  
Director of Finance/Finance Office

### **Check List for Group Leaders**

- a) Prepare a letter to parents/carers which will include permission and personal details required such as contacts etc. A copy of this letter must be sent to the EVC for approval.
- b) Test the numbers interested BEFORE committing the faculty allocation to funding an educational visit.
- c) If the numbers make it viable, agree with SLG line manager the booking details.
- d) All monies will be collected via the Finance Office. Group Leaders and other staff must not collect monies.
- e) The letter to parents/carers must make it clear FROM THE OUTSET that no monies are refundable under any circumstances unless the school cancels the visit. Only valid insurance claims will be considered.
- f) Parental consent (in writing) must be obtained for all students who will participate in the educational visit.
- g) Confirm staffing arrangements and complete and submit absence/cover request forms as per the school's procedures.
- h) Raise the necessary purchase orders and hand these to the Finance Officer for processing.
- i) Confirm transport, activity and accommodation bookings (all to be booked via Finance Office) and inform the EVC.
- j) If necessary, arrange well in advance, parent/carer meetings and pupil briefings to discuss objectives, codes of conduct and schedules.
- k) Ensure that all staff and pupils involved in the visit are fully briefed.
- l) Additional preparation and paperwork for residential, adventurous and overseas educational visits must be discussed with the Headteacher and EVC.
- m) Complete Specific detailed Risk Assessments/procedures/expectations relevant to the educational visit and share/agree with staff involved in the educational visit.
- n) Notification of visit and student/staff details to be emailed to all staff at least a week in advance.
- o) Inform Catering Manager of pupils requiring Free School Meals for visit and number of absent pupils on the visit for catering purposes.
- p) Copies of pupil details (as well as contact information for staff on the visit) and a covering summary sheet MUST be left with the EVC and Reception for emergency contacts before the day of the educational visit and amended on the day as necessary.
- q) Analyse pupil personal and medical details, highlighting issues to all staff on educational visit and collect relevant first aid kit.
- r) Details of pupils on the educational visit to be emailed to staff.

### **On the day of the visit**

1. On the day of the educational visit a copy of pupils present and absent and a pre-prepared list of contacts and medical needs must be left with the EVC and the school office(s). If this does not occur the educational visit may be cancelled and/or recalled. The faculty will be liable for any costs incurred.

**Appendix N  
continued**

2. During the educational visit, Risk Assessment procedures must be followed at all times.
3. All staff will be given a copy of the procedure to be followed in the event of a disaster on an educational visit (Appendix B).
4. Contact numbers must be checked before leaving to ensure that there is viable contact with the EVC or other named senior person at school. **DO NOT RELY ON THE MAIN SCHOOL TELEPHONE NUMBER SOLELY.**
5. Group Leader to leave mobile number with the main office and the EVC.
6. Before returning ensure everyone is present and once returned let the EVC/emergency contact know.