



# Educational visits Policy

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AUTHOR	Penny Ward and Caroline Spence
DOCUMENT OWNER	Premises
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## **INTRODUCTION**

The social and educational benefits arising from visits and journeys outside the school are well recognised. The Governing Body supports these activities and is pleased to see that the number and range being undertaken by the school is high. The educational visits policy and associated guidance is designed to ensure that such activities are safe and well managed

### **Legal Framework**

Under the Health and Safety at Work Act 1974 employers are responsible for the health, safety and welfare at work of their employees. Employees are also under a duty to ensure, so far as is reasonably practicable, the health and safety of anyone also on the premises or anyone who may be affected by their activities. This includes participants in off-site visits. The Governing Body is the employer.

The Management of Health and Safety at Work Regulations 1999, made under the 1974 Act, require employers to:

- assess the risk of activities;
- introduce measures to control those risks; and
- tell their employees about these measures.

### **Also under Health and safety legislation employees must:**

- Take reasonable care of their own and others' health and safety;
- Co-operate with their employers over safety matters;
- Carry out activities in accordance with training and instruction;
- Inform the employer of any serious risks.

These duties apply to all educational visits. Staff members and other adults in charge of students also have a common law duty to act as any reasonably prudent parent would do in the same circumstances.

The following quote comes from Croner's Head's Legal Guide (Sep. 2002)

*"School journeys and educational visits are an extension of school activities. Teachers and, by extension, other adults responsible for supervising pupils taking part in journeys and visits must be expected to act towards the pupils as a careful parent would towards his or her children in similar circumstances. It is a professional duty, included in the School Teachers' Pay and Conditions Document, for a teacher to maintain the good order and discipline of pupils and safeguard their health and safety, not only in school, but also when they are taking a party in authorised activities elsewhere. **In the case of a journey, they are responsible for the pupils in their care 24 hours a day, seven days a week.** The responsibility is not lessened because the duty is undertaken voluntarily. In all cases where the teacher has accepted the care of the child, he or she must take responsible precautions for their safety. School rules should still be applied to ensure the discipline and control of the pupils".*

### **Reference documents**

The DFE publish a range of guidance documents which have been used to inform this policy. These include:

- Outdoor Education Advisors Panel National Guidance;
- HSE: School trips and outdoor learning activities; tackling the health and safety myths;
- <http://media.education.gov.uk/assets/files/pdf/h/health%20and%20safety%20advice.pdf>
- *Group Safety at Water Margins*

## **Responsibilities**

The responsibilities set out in these guidelines are summarised below.

### **Carstens & Robinson Ltd**

To support with the annual reviews of the school journey policy;  
To review category A school journeys as requested by the school;  
To arrange training in school journey management;  
To provide advice and guidance to schools on school journey management;  
To undertake incident investigations where deemed necessary.

### **Governing Bodies**

Establishing policy suitable for school, including procedures for the approval of visits/journeys;  
To assist Head Teachers / EVC with school journey assessments and approval of category A visits;

**Chair of Governors will approve any category A visits which are abroad.**

### **Head Teachers**

Managing all visits and journeys in accordance with the policy/standard set by the governing body and Carstens & Robinson Ltd;

To approve all category B visits and to have an internal approval system in place to ensure all journeys are adequately managed.

### **Organiser**

Submitting for approval school journey risk assessments and application form (EVOLVE);  
The completion of specific journey / visits risk assessments;  
Reviewing all generic risk assessments relevant to the journey;  
Establishing emergency procedures for journeys / visits;  
To brief teachers and supervisors in risk management procedures and controls;  
To liaise with parents where necessary;  
To ensure that all parent consent forms are completed and returned (where appropriate);  
To pass key information to the Head Teacher, EVC and governors.

### **Visit Leaders**

To actively lead and manage school journeys / visits;  
To brief students about tasks and behaviour expectations;  
To report and record all accidents on the journey / visits;  
To implement the controls identified within the risk assessment and to report any shortcomings to the EVC / Organiser immediately;  
To instruct and share the content of the risk assessment with other adults / staff members attending the journey / visits;  
To evaluate the visit following completion (EVOLVE).

### **The Educational Visits Co-ordinator and the Headteacher**

Assess the competence of leaders and other adults proposed for a visit. This will commonly be done with reference to accreditations from an awarding body. It may include practical observations or verification of experience;  
Assess staff/dates of visits;  
Keep records of individual visits (EVOLVE) including reports of accidents and 'near misses'.

### **Educational Visits Co-ordinator**

To undertake annual reviews of the school journey policy;  
Support the head teacher and governors with approval and decisions;  
Assign competent people to lead or otherwise undertake this role;  
Organise the training of leaders and other adults going on a visit. This will commonly involve training such as first aid, hazard awareness, etc.;

Liaise to ensure that educational visits meet the employer's requirements including those of risk assessment;  
Organise thorough induction of leaders and other adults taking students on a specific visit / journey;  
Ensuring that DBS disclosures are in place as necessary;  
Organise the emergency arrangements and ensure there is an emergency contact for each visit/journey;

Review systems and, on occasion, monitor practice.

### **Competencies of Key Personnel**

It should be noted that the member of the school staff designated as the EVC should be specifically competent. This also applies to anyone planning or review school journeys. The level of competence required will relate to the size of the school and the types of educational visits/journeys proposed. Evidence of competence may be through qualification and/or the experience of practical leadership over many years of outdoor education.

It is clear that each visit or journey carries its own unique risks and requirement. For low risk visits you may wish to look for the following attributes in school journey leaders / organisers:

- Experience in running similar activities;
- Knowledge of the children's specific needs;
- Understanding of the school journey management system;
- A positive leader with the correct aptitude for school journey management.

For higher risk activities and some school journeys you may require the additional attributes:

- Qualifications in activities to be undertaken;
- Thorough knowledge of activity;
- Comprehensive experience;
- Strong leadership skills;
- Be adept at dealing with emergency situations;
- Effective communicator;
- Multi lingual abilities for journeys abroad.

In addition to the general competencies of staff undertaking school journey leadership, the role of visit leader is crucial to a successful and safe visit/journey. The choice of a visit leader is, therefore, a key decision.

- A visit leader will be a qualified staff member with experience and training appropriate for the visits/journeys;
- A deputy visit leader should be nominated at the start so that they can, if necessary, take over from the visit leader either during the planning stage or during the visit/journey itself, and be fully knowledgeable of all aspects of the journey;
- If a party is split into groups, it must be clear who is in charge of each group. This also applies for multi-school or cross borough activities.

### **Definitions.**

Visit;	An activity for students away from the school with no overnight stay
Journey;	An activity for students either at the school or away from the school involving an overnight stay
Organiser;	The staff member responsible for the preparation and planning of a visit or journey
Group Leader;	The party leader or teacher in charge who is responsible for the supervision and safe conduct of a group of students on a visit or journey. On many visits/journeys, the leader may also be the organiser.
Staff Member;	A qualified teacher on the school staff, or in exceptional circumstances, a member of the school's extended workforce who has the relevant experience and qualifications
Other adult;	A responsible adult over 18 who is not employed by the school but has undergone the necessary safety checks, and is deemed to be an appropriate person to support the visit or journey e.g. parents, student teachers

Outdoor Investigations; Student led/teacher guided observations and data gathering away from the school e.g. geography field trips.

High risk environments examples are:

- Activities in mountainous areas
- Work at the base of cliffs
- Activities near water with no life guard cover
- Activities in difficult terrain
- Activities in areas subject to rapid change in weather conditions

Student; This is taken to mean all young people on a visit who are under 19 whether or not they are on the roll of the school unless they are a designated “other adult”.

Parent; This means parents, carers and guardians

**DBS;** **Disclosure Barring Service**

Activity Centre; Any centre/venue that provides activities for children/adults or facilitates such activities through third party providers

Adventurous Activities; These are activities which carry a degree of risk. The risks may be inherent in the activity or location, or where the activity is vulnerable to changes in the weather. The activity may involve the acquisition of specific skills and normally involves the use of specialist equipment and specialist instruction. Further guidance can be found in section 4. For the purpose of the policy adventurous activities is taken to mean both licensed and non-licensed activities.

## **Guidance for School Journeys.**

### **Application Process**

To understand how to apply to run a visit or journey at Park High School please read this document and follow either flow chart in Appendix A. To ensure that risk assessments are completed and that appropriate controls are implemented the school is required to review all high risk activities and monitor low risk school visits. To help identify which visits / journeys need reviewing we have created two distinct categories of visits / journeys.

### **Category A**

This is the high-risk category where the EVC is responsible for ensuring that risk assessments have been carried out and submitted at least four weeks (during term time) in advance of the visit. The visit/journey information will be reviewed by the EVC and forwarded to Carstens & Robinson Ltd when necessary for advice or guidance. Carstens & Robinson Ltd will review and acknowledge the risk assessment and email back with formal approval or if there are deficiencies identified within the risk assessment a return email will be sent, detailing nature of the deficiencies and required action. It is the responsibility of the school to ensure that any deficiencies identified by the Carstens & Robinson Ltd are addressed and the risk assessment is re-submitted.

### **Category A Journeys / Visits tend to include:**

- Journeys involving an overnight stay either at or away from the school, in this country or abroad;
- Any day trip outside of the United Kingdom;
- Visits to activity centres;
- Day visits involving activities near water (e.g. River, lake, canal), coastal or high risk areas i.e. mountainous areas or other such adventurous activities;
- Swimming in swimming pools where lifeguard cover is **not** provided.

Staff accompanying these journeys will attend a briefing meeting with one of the safeguarding team ahead of the journey and will sign a declaration that they have read and understood the School Visits and Journeys policy. Parents will be asked to attend an information evening for trips outside of the UK.

## Category B

### Category B Visits tend to include:

- Trips to museums / galleries;
- Visits to local places of worship;
- Seminars / talks at other educational establishments;
- Bowling alley / cinema.

The school should actively manage category B visits, completing risk assessments in the same manner as they would category A journeys. The head teacher (community schools) or governing body (voluntary aided schools) are responsible for ensuring all risk assessments have been completed. If the approval and review role is designated to the School Visit Coordinator or competent planner it must be ensured that the head teacher or governing body monitor risk assessment standards on a regular basis. Carsten's & Robinson Ltd may request copies of category B risk assessments as part of its role in monitoring safety management within schools.

## Preparation and Procedures

### Aims and objectives

All visits and journeys should have clearly set out aims and objectives with activities (whether educational or recreational) which are suitable to the age, aptitude and experience of the students. It is important that the aims and objectives are known and understood by both students and parents/carers.

Staffing ratios will need to be set for each visit or journey. The level of cover required is based on risk the assessment and takes into account:

- i. the nature and duration of the activity;
- ii. the ages and characteristics of the students - particular regard will need to be given to very young students and students with special educational needs;
- iii. the skills and experience of the teachers;
- iv. the nature of any activities been undertaken and their suitability;
- v. the availability of external assistance;
- vi. The competence and behaviour of children;
- vii. particular factors arising from preliminary visits and risk assessments.

It is not possible to set staffing ratios which cover all situations. Bentley Wood High School has, however, established indicative ratios for visits and journeys which should normally be regarded as **minimum** requirements and should be considered as part of the risk assessment. These supervision ratios are taken from DfE guidance.

Organisers need to exercise flexibility and professional judgement on all occasions; this applies particularly in the areas of risk assessment. High standards and safety remain paramount and if an activity cannot be appropriately staffed it should not take place. The ratios, set out below, should include at least one teacher along with other adults such as non-teaching staff, parents and students undergoing initial teacher training, etc. It is best to avoid taking members of staff's children on a visit or journey, but if this is unavoidable, they should not be in the same group as their parent. It is also paramount that the school choose only parents it feels are suitable for the visit / journey to be undertaken and that these parents are fully briefed on their role during the visit and expected behaviours. Where possible it is best practice that no adult has their own child in their group.

## Journeys – Category A

Age Group	Recommended Minimum Ratio
Key Stages 3 and 4	1:10
Key Stage 5	1:15

## Visits/Journeys – Category B

Age Group	Recommended Minimum Ratio
Key Stages 3 and 4	1:15
Key Stage 5	1:20

***N.B. The minimum number of staff members on any Category A journey must be two & drivers cannot be counted in the ratio for the journey.***

## Supervision of Students

### Journeys, Sleepovers in School and Visits Abroad

Supervision will need to cover 24 hours a day and all staff members and other adults must be aware of this fact. Providing adequate cover can be maintained, staff may have “time off”. However, communication systems must ensure that all staff are contactable at all times. At least one member of the on-duty staff should be acting as visit Leader at that time with the necessary qualification/experience for undertaking the responsibilities of that role. It is the responsibility of the school journey leader to ensure that staffing ratios are maintained at all times, and that those on duty consume no alcohol at all. Staff who are off duty should only consume amounts within the legal limit for driving a vehicle.

1. There must always be a minimum of two staff members on journeys involving an overnight stay (one must be female). Particular attention should always be given to staffing arrangements on those journeys where it is proposed that teachers will be outnumbered by volunteers, e.g. in terms of the knowledge of and familiarity with the students.
2. Staffing levels must always take into account how emergency situations will be managed and this should include the need for a student having to be sent home or a member of staff being unwell or injured. It should be ensured that the staffing ratios are not reduced so as to jeopardise the safety of the remaining students.

### During transport

To ensure that the driver of a minibus or coach be able to undertake their duties as a driver they must not be counted towards the staffing ratio during the travel period.

Driver supervision may be sufficient if a small number of older children (Key Stage 3 – 5) are being taken on a short journey as part of a local sport fixture or similar event. Further guidance can be found in appendix A – Supervision Requirements for Sport Fixtures

### **Students not under Direct Supervision**

The proposal for any individual student to undertake an activity independently without direct supervision needs to be properly assessed in terms of their skills and experience. Parents should always be fully informed of the aims and objectives of this independent work and have signified their agreement to it as part of their consent to the visit/journey.

### **Dismissal of students Off-Site**

The dismissal of students off-site at the end of a visit/journey must be cleared in advance with parents as part of their consent to the visit/journey. No students must be left on their own following a visit if the parents are expected to collect their child. This will normally be stated on a reply slip with an agreed place for the student to leave the rest of the group.

Students from Years 7 to 11 must return with the accompanying staff to the agreed drop off place where parents will collect their daughters.

### **DBS**

As from 12 May 2006 it is mandatory to obtain enhanced DBS disclosures for all new appointments to the school's workforce and those who have been out of the workforce for more than three months. Not all volunteers need to be DBS checked, for example those volunteering for one-off visits, as they will not be left unsupervised in charge of children: this applies to all non-regular staff.

### **Medical matters**

#### **First Aid**

The level of requirement for first aid should be ascertained through risk assessment. The level of first aid cover will as such be proportional to the level of the visits or journey. However, it is recommended that there should be a staff member or other adult who has an up to date qualification having completed an Emergency First Aider qualification (1 full day) or a full First Aid at Work Course (3 full days), on all category A school visits and journeys. It is also recommended where reasonable to provide first aid cover for category B visits where risk of injury can be foreseen e.g. a PE fixture. It is also recommended that if you are taking any child with a serious medical condition that a first aider or emergency first aider be taken as a precaution.

If this is not possible for a first aider or emergency first aider to attend a Category B visit, then there must be a first aid plan in place which should be included in the risk assessment.

In assessing the first aid requirements you will need to consider:

- the type of activities to be undertaken and anticipated injuries;
- any medical or special needs of group members;
- proximity of nearest emergency services and access to emergency services;
- past accident rates or incidents;
- potential impact on the visit / journey that an injury may have.

A medical form must be completed for all Category A journeys. A copy of the form should be issued to and completed by parents 3-4 weeks before the journey.

**Students with specific medical needs, e.g. epipen, should be treated as if on a Category A journey for any visit or journey and medical information taken with the staff member, who should be trained, confident and willing to administer the medication as required.**

### **Medication**

- i. Visit leaders and other staff members should be familiar with the advice available in schools on the administration of medicines. Any medicine used regularly for a child should be taken on the journey.
- ii. In general, students (except those with learning difficulties that impair understanding) should be in charge of their own medication. Before setting off, the Visit Leader needs to ensure students have their medication with them and also oversee that the medication is taken as required whilst on the trip.
- iii. Except in very exceptional cases, e.g. insulin, epipen, and some asthmatic prescriptions, medicines, including travel sickness tablets should be handed to a named teacher or supervisor prior to the start of the journey and should be clearly labelled with the name of the medicine, the reason for its use, the name of the student and the amount and timings of the dose.
- iv. On excursions, or where students are split into groups, all accompanying adults should be aware of any special medical condition of individual students. Medication, injections and equipment (if not being carried by the individual student) should be carried by the leader of the group, who should know how to use them.
- v. If a student's medicine is found to be missing when the destination is reached the local general practitioner or local hospital should be contacted immediately. A doctor will normally be able to arrange the issue of a prescription.
- vi. If staff members are concerned about whether they can provide for a student's safety or the safety of other students on a visit because of a medical condition, they should seek general medical advice from the School Health Service or further information from the student's parents. For further guidance schools should refer to the DfE guidance – Supporting students with Medical Needs – a Good Practice Guide.
- vii. It is essential that school journey centres and instructors have the relevant information regarding the medical needs of students in their groups. This should be sent in advance and should be checked before each activity begins.

### **Nearest Doctor/Hospital**

The name, address and telephone number of the nearest doctor, dentist and hospital with an accident and emergency unit needs to be known in advance of any Category A visit.

### **Special Diets**

Information about special diets is requested from parents on the medical form, and should be communicated in advance to any relevant agencies and confirmation received that all dietary needs can be catered for.

### **Infectious Disease**

It is of the utmost importance that students should be closely watched and any pupil showing signs of ill health should be isolated at once and the doctor called, especially if any abnormal condition of the skin appears (i.e. rash, eruption, roughness or peeling). This also applies to sickness and diarrhoea. The doctor should be told if any infectious illness is known to be prevalent in the student's home district so that he/she may (if necessary) call in the assistance of the local consultant in communicable disease control

Visit Leaders should be aware of the guidance from Health England:

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/353953/Guidance\\_on\\_infection\\_control\\_in\\_schools\\_11\\_Sept.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/353953/Guidance_on_infection_control_in_schools_11_Sept.pdf)

If you suspect an outbreak of an infectious disease whilst on a journey/visit, please follow school's EV9 Emergency Card and EVC to refer to Business Continuity Plan and also contact the local Public Health England office on 0843 178 7401.

### **Emergency Treatment**

The medical form asks parents to agree that, in the event of an emergency, students may be given any treatment necessary. In such an event, parents should, if possible, be contacted by telephone. It is important however that any person giving such treatment is qualified to do so. Please refer to the first aid section for further guidance. If a parent refuses to give consent for medical treatment, all staff on the visit must be aware of this and notify health professionals.

### **Health Issues and the Environment**

Visit organisers and leaders need to be aware of the wide range of health considerations which are posed by the environment, such as heat and sunstroke. These kinds of questions are addressed particularly in the guidelines in 'Risk Assessment and Management'. However, it needs to be understood that advice on these issues cannot be, and is not intended to be, comprehensive.

### ***Accident Report Forms – form available on EVOLVE Docs***

The school's accident report form should be completed as soon as possible for any accident, which occurs on a visit or journey. A copy to be given to the EVC for monitoring purposes and the medical room. The Visit leader must also ensure that any accidents are reported to the venue / centre where they occur.

## Information for Parents

### General Principles

- i. Parents should always receive written information about visits and journeys, either by letter, text or email
- ii. The written information must provide a clear and detailed description of the arrangements for the visit/journey and the activities, including any hazardous activities which will be followed.
- iii. Written consent and medical details must always be obtained from parents before students participate in journeys and category A visits. It should be drawn to their attention that on the consent form they have agreed that, in exceptional circumstances, such as unacceptable behaviour, it may be necessary for their child to be sent home or collected and they would be liable for the expense.
- iv. The timetable for parents' involvement should be such that there are opportunities (should this be necessary) for consultation and the resolution of queries.
- v. For most category A journeys, there will be a need for a parents' evening where parents can meet the visit leaders, staff members, other adults and supervisors. Organisers will need to consider what alternative arrangements can be made for parents who are not able to attend such evenings. This could be in the form of a frequently asked questions list.
- vi. The information provided for parents should not include any disclaimer(s) which attempts to absolve organisers from responsibility. Such disclaimers have no legal foundation or value.
- vii. Parents need to be aware of the standards of behaviour expected and the consequences of those standards not being observed see 9(ii) and 9(iii) above. Where the behaviour of a student is such that a decision has been made that they should not take part in a visit/journey, the curricular aims of the visit/journey should be fulfilled in other ways. This decision should come as no surprise to the parent as they should have been kept fully informed at all times of their child's behaviour leading up to the exclusion.

### The Special Educational Needs and Disability Code of Practice 2014

Organisers should make all reasonable adjustments to the journey/visit plans to enable all students to participate even if this means using a different venue to one they have used for many years. It is important, particularly with journeys that this is anticipated well in advance so that advice can be sought from specialists early in the planning process to enable maximum participation. It should be noted that if such adjustments are not made then a school could be liable if they are found to be discriminating against an individual student who could be deemed to have a disability.

### Specific Considerations

Information and briefing for parents should always pay attention particularly (where appropriate) to

- i. **Dismissal of students off site** - at the end of a visit/journey must be cleared in advance as part of their consent.
- iii. **Serious accidents/illness** - Almost inevitably serious accidents and illness on visits/journeys will need to be reported to parents by telephone. Schools should have a critical incident policy which should be taken on the journey and procedures known by all staff.
- iv. **Communications between students and parents** - Suitable arrangements need to be made in advance about notification of safe arrival and any other contacts that may be required. Schools will normally nominate a contact person in the home area who will be responsible for receiving and cascading information according to a previously agreed system.

- v. **Over-subscription of places** - If there is an over-subscription of places, the procedures should be transparent and notified to parents in advance.

### **Record keeping**

#### **Journeys (Overnight Stays)**

The leader for any journey should keep a journey log comprising of simple diary entries detailing any administration of medicines, all incidents, including accidents, illness and individual problems. Whilst on the journey a list of all current emergency contacts for every student and staff member should be kept with the log.

#### **Visits**

No formal log is required for visits, although the head teacher would want to have an immediate written account from the leader of any particular incident(s) and risk assessments should be updated to inform future visits if it is a regular visit.

All records in relation to a journey or visit should be kept by the school for a minimum of three years. This includes risk assessments, itineraries, letters to parents, consent forms and financial records. (These should be uploaded onto EVOLVE)

If there has been an incident on the journey which could give rise to a claim it is essential that the records be kept until the child concerned reaches the age of 21 as a claim can be made up until that time. This will include all documents listed above.

## **Insurance**

### **Types of Insurance Cover**

There are two types of insurance cover that need to be considered in respect of visits and journeys:

**i. Public liability (third party) and professional indemnity insurance**

These insurances protect against the cost of claims for negligence made by third parties.

**ii. Travel or journey insurance**

This type of insurance provides cover for specified eventualities such as:

- Medical and Emergency Travel Expenses
- Baggage, Personal Effects and Money
- Cancellation and Curtailment
- Personal Accident

Park High School has this cover through Zurich Municipal. For any further details of information on making a claim please contact the Business Manager.

### ***Teachers and supervisors using own vehicles***

There should be cover within the school's insurance policy for teachers and supervisors to use their vehicles in an emergency, e.g. taking a student to hospital. For use of their vehicles on other occasions, whether or not expenses are being claimed, they must have informed their insurance company that their vehicle is being used for business purposes otherwise any claim made which relates to the use of the vehicle on school business may be disallowed. The member of staff must give a photocopy of their insurance certificate to the Business Manager and should also upload it onto EVOLVE. **Parents should be informed before students can be carried in a teacher's private vehicle and students must be accompanied by another member of staff or other students.**

### ***Safe use of vehicles***

The number of people in a vehicle must not exceed that permitted by the law and where seat belts are fitted they must be used. Under no circumstances should a child be transported without using a seat belt. Failure to comply with these legal requirements may result in reduced compensation payments by the insurers. When allocating seats in vehicles, teachers should fully consider whether a student travelling in the front seat could be injured by the air bag should it deploy. Also a student should not travel in the back of a car using a lap belt without specific parental consent.

**Alcohol:** Drivers of any vehicle should never drink and drive, and should be aware that alcohol can remain in the body for up to 24 hours.

***When assessing staffing ratios, the driver cannot be counted as a staff member whilst on driving duties.***

### ***Package deal insurances***

Some companies offering package deals also offer free insurance. Others offer additional insurances for the payment of a premium. It is not always clear if these insurances offer any additional cover and it is prudent that this should be checked with the school travel insurance before involving parents in additional expense (see below).

### ***Queries/Further advice***

Organisers are advised to be particularly mindful of exclusion clauses and exemptions when looking at insurance policies. Exceptionally it may be necessary to insure students for special medical conditions and advice should be sought from the insurance provider.

## **Inspecting certificates of insurance**

It is recommended that arrangements be made to check that insurance cover exists by inspecting the certificate of insurance.

## **Finance and accounting**

- i. Head teachers are responsible for all funds within or relating to their school and should ensure that appropriate systems are in place to account for all income and expenditure on visits and journeys.
- ii. These systems should be based upon a consideration of the following issues:
  - payments out being recorded;
  - wherever possible vouchers and receipts should be obtained and kept;
  - surplus contributions being repaid to parents;
  - audited accounts being drawn up and presented to governors (and being available to parents on request);
  - funds paid for school journeys/visits should appear under a separate heading.

## **Charging and Voluntary Contributions**

All charges levied from parents for visits/journeys and all voluntary contributions sought from parents for visits/journeys must be in accordance with the school's charging policy. It is a requirement that a visit/journey should not be intentionally 'profit-making'. Where it is not possible for a student to attend a visit/journey the curricular aims of the visit must be fulfilled in other ways.

## **VAT**

HM Customs and Excise state that all school visits/journeys, which fall within the National Curriculum, are considered as non-business. This means that any VAT incurred can be reclaimed in the normal manner if payments are made through the school's official account. There can be some difficulty in deciding which journeys fall within the National Curriculum and which do not. However, HM Customs and Excise will accept the head teacher's interpretation, provided the head teacher is prepared to sign the invoices stating that the journey falls within the National Curriculum and that all of the VAT can be recovered.

## **Assistance for students**

It may be possible for schools to secure help for students from unofficial funds or from local charities. Within the Age Weighted Pupil Unit (AWPU), under social deprivation, there is an allocation which can be used for students receiving free school meals. Students who are entitled to free school meals should be provided with all meals whilst on a visit / journey. Free School Meal packed lunches should be arranged with the Business Manager at least a week in advance.

## **Costing**

An estimate of the cost of the visit/journey should be prepared and discussed with Kay Mayani, Finance Manager at least 3 weeks before any visit where students are to be charged. This should be in as much detail as possible so that parents are aware of what is covered and (just as important) what is not covered. It is important to remember that parents will also want to know about the timetable for payments. The amount to be charged must be agreed along with a deadline to be put on Parent Pay. The costing spreadsheet should be uploaded to EVOLVE.

## **Pocket Money**

The amount of pocket money should be suggested to parents. Any cash carried by students is their own responsibility but large amounts should be discouraged.

### **Access to Funds/Loss of Funds**

Where payments cannot be made in advance arrangements must be made for school parties to have access to cash for necessary daily disbursements, including pocket money. These arrangements need to balance the conflicting claims of ready access and security. Whenever possible, funds should be carried in travellers' cheques but if this is not possible, cash holdings, which should be as low as reasonably practicable, should be kept in a secure place or, failing that, distributed amongst the supervisors.

Any loss of funds should be reported to the police and a record kept of the circumstances

Emergencies

### ***EV9 Card – Business Continuity Plan***

In the event of an emergency on a visit or journey, the procedure is to notify immediately the headteacher or his nominated representative. It is strongly recommended that two or three emergency contact telephone numbers are taken on school journeys. It is good practice for these numbers to be prepared on a card to be carried by all teachers/supervisors.

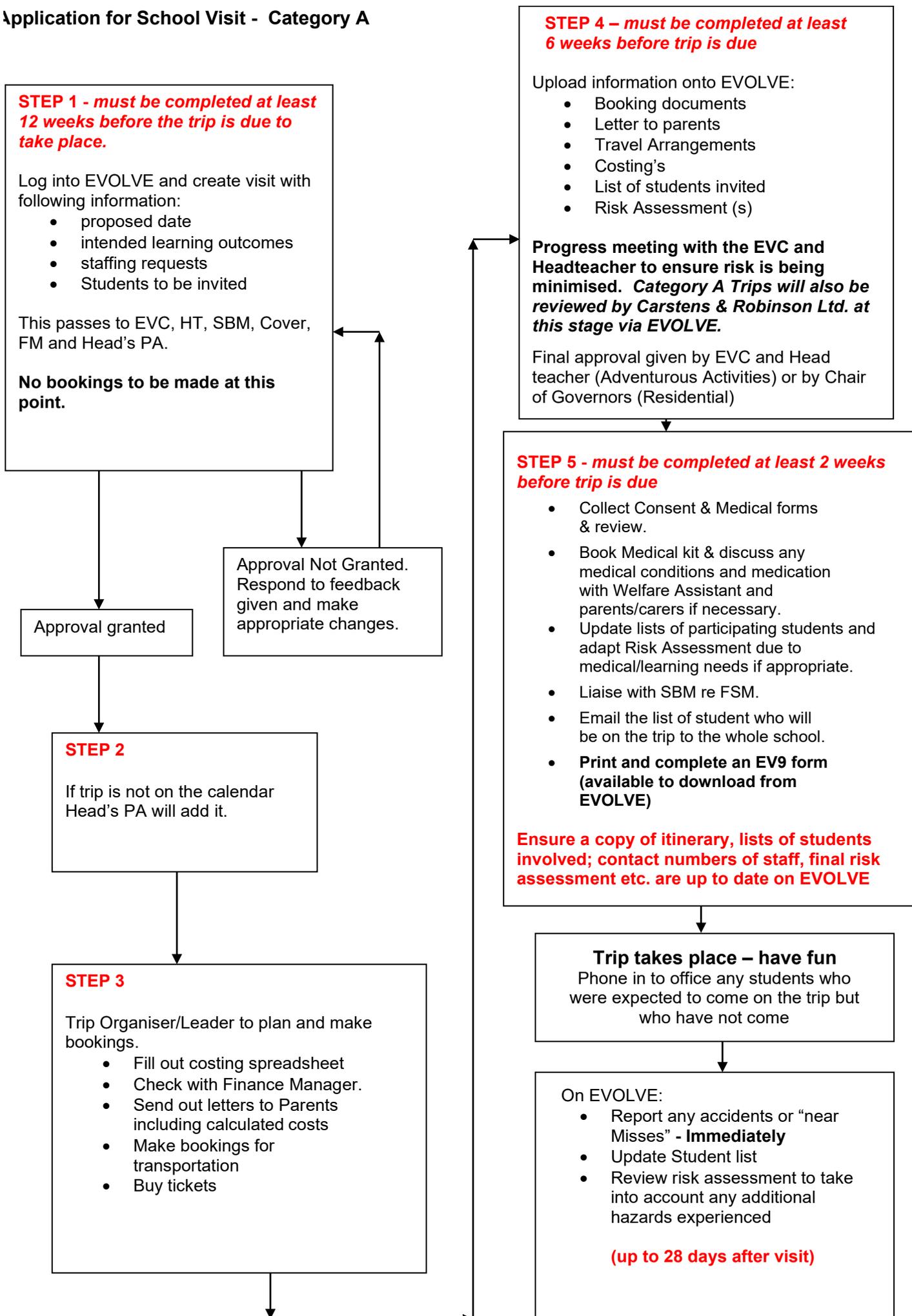
- School telephone number;
- Head teacher/ nominated SLT mobile number;
- Other nominated emergency contact number(s).

The school's critical incident plan (in BCP) can then be implemented as required. A summary of this should be included in the journey leader's paperwork which is carried on the trip.

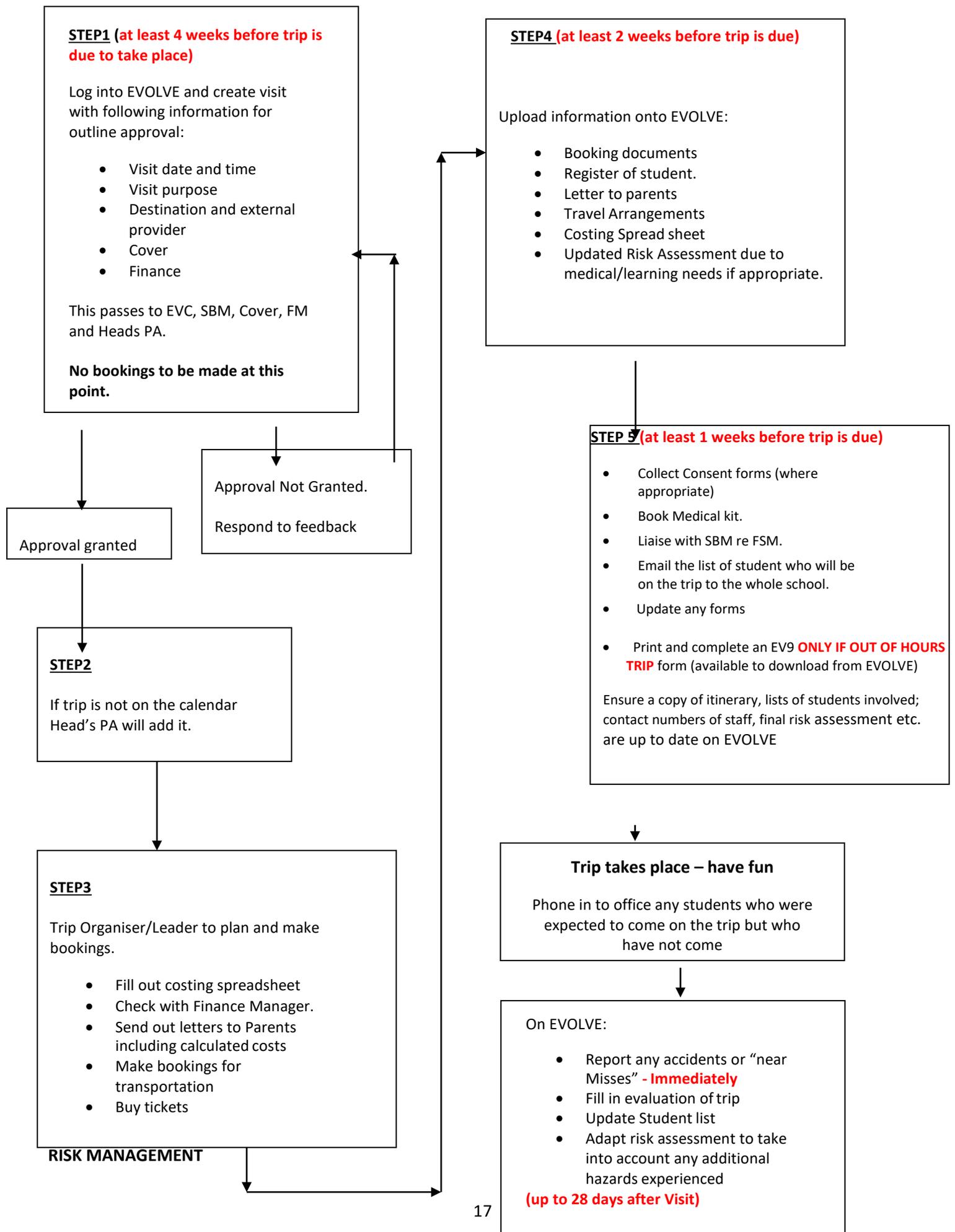
### ***Dynamic Risk Assessment***

On any visit there is always the potential for things to be different from that which was anticipated even when pre visits have been made, for example emergency road works mean that coaches cannot drop off where planned. Visit leaders need to be aware that plans may have to change and dynamic risk assessments carried out to accommodate the changed circumstances. It is important in these circumstances to take the time to consider all options and not be rushed into hasty decisions. This does not need to be documented at the time but it is worth remembering or noting why you made that decision at the time. After the visit it may be worth updating risk assessments or making notes to inform others who could find themselves in a similar position.

## Application for School Visit - Category A



## Application for School Visit Flowchart – Category B



## Risk Assessment and Management

Organisers and everyone concerned with visits and journeys should always give prime consideration to matters of safety and follow guidance in statutory and school health and safety policies.

The safe completion of an activity requires:

- i. the identification and assessment of potential dangers;
- ii. the management of activities to minimise risk.

### Key elements of this approach include:

- i. the assimilation and prudent application of guidelines;
- ii. the experience and training of organisers and supervisors;
- iii. the exercise of sound judgement in relation to individual circumstances;
- iv. the use of safety checklists
- vi. a transparent and effective system of communication between all staff members and other adults e.g. a list of all relevant mobile and essential telephone number given to all prior to the journey/visit, awareness of areas where mobile signals are weak or available only to certain networks.

**Risk assessment is nothing more than a careful examination of what could cause harm to people.** It can then be decided whether everything reasonably practicable has been done to prevent harm.

The organisers of each visit and journey should assess risks when planning journeys and visits. The risk assessment should be an on-going process undertaken by accompanying staff, in liaison with staff providing any services throughout the journey/visit. The risk assessment should be based on the following considerations:

- what are the hazards;
- who might be affected by them;
- what safety measures need to be in place to reduce risks to an acceptable level;
- can the group leader put the safety measures in place;
- what steps will be taken in an emergency, e.g. road traffic accident, member of staff being admitted to hospital etc.

Organisers need to list all the activities that are part of the entire journey or visit e.g. travel; sleeping arrangements etc. and complete an assessment for each. These assessments for Category A journeys and visits need to be sent to the consultants if deemed necessary by EVC.

Risks should be assessed **LOW, MEDIUM** and **HIGH** taking into account:

- the type of activity and the level at which it is being undertaken;
- the location;
- the competence, experience and qualifications of school supervisory staff;
- the ratio of competent, experienced and qualified Centre staff to students;
- the age, competence, fitness and temperament of the students;
- seasonal conditions, weather and timing;
- the controls put in place.

<b>LOW</b>	No additional action required only basic controls. Monitoring required ensuring that controls are maintained.
<b>MEDIUM</b>	Action should be taken to reduce the risk through improved control measures.
<b>HIGH</b>	The activity should not take place until the risk has been reduced.

- It should be ensured that issues identified by the exploratory visit have been resolved within the risk assessment.

- Organisers carrying out the risk assessment should record it and give copies to all teachers/supervisors on the visits/journeys, with details of the measures they should take to avoid or reduce the risk. The head teacher and governing body should also be given a copy as appropriate to the category of the visit/journey and who gives approval. It can then be seen that effective planning has taken place.
- Frequent visits to local venues such as swimming pools may not need risk assessment every time. **Nevertheless, it is essential not to become complacent.** A generic assessment of the risks of such visits should be made at regular intervals and careful monitoring should take place.
- It is the duty of the provider e.g. school journey centre to issue risk assessments for specific activities and on site arrangements and these are usually obtained through their website.

## Programme Planning

When drawing up a programme of activities, organisers will want to bear in mind the duration and intensity of the activities; the age and experience of the students; and the need for breaks and relaxation for both students and supervisors. The more strenuous the programme, the more rest and sleep students will need. Programmes should be flexible and capable of being changed should circumstances require this.

## Head Counts

A programme of activities should include specific requirements for the frequent checking of student numbers, i.e. head counts. This should be done every time there is a transition.

## Preliminary Visit

Accurate knowledge of accommodation, facilities and the local environment are essential if the destination has potential hazards such as the sea, lakes and waterways, uplands and mountains, etc. Where a school has not had previous experience of a particular venue, the Headteacher is likely to consider a preliminary visit to be particularly important. It may also be necessary where a venue has been used previously but where a journey has a new leader. Preliminary visits can also be used to consult local support agencies such as coastguards, mountain rescue and the police. In cases where a preliminary visit is impracticable, e.g. a location abroad, planning will need to be done using the most authoritative information available.

## Fire Drills

On arrival at a residential venue, supervisors should instruct students about means of escape and a fire drill should be carried out. A note of this should be made in the school journey log.

## Students

- In many cases, the aims and objectives of a visit/journey will build naturally on work already being undertaken in school and will lead to follow up work on your return.
- Students need to be clear about all the activities, in which they will be involved (travel, accommodation and projects, etc.). They should also be clear about behaviour, codes of conduct, supervision and safety.
- Students need to be clear about actions which will be taken in respect of breaches of codes of conduct and (in extremes) that they might be sent home early.
- Briefings for students should be on at least a daily basis and more frequently if necessary.
- All students must know what to do if they become lost or separated.

## Advice on the use of mobile telephones.

- Organisers should make rules as to how these should be used particularly in an emergency. Whilst they can be very useful to keep in touch with staff where students are working on outdoor investigations, etc., they must

not be used by students to communicate information in the event of an accident until the parents of the students concerned have been notified either by the police or the school. The school and parents must also be aware that the school can not take responsibility for loss or damage to items of non-essential electrical equipment (as indicated on the parent consent form).

- vii. Staff members and other adults who have not previously come into regular contact with students should acquaint themselves with individual students and be aware of their characters and needs.
- viii. The Governors expect the ethos of visits and journeys to build on its established approach to equal opportunities through the provision of educational enrichment for all pupils.

**ADVICE ON PARTICULAR CATEGORIES OF ACTIVITIES**

**Activity centres**

The Adventure Activities Licensing Scheme is a Government sponsored scheme, which was introduced in 1996 under the Adventure Activities Licensing Regulations. The scheme ensures that those who provide certain adventure activities to young people under the age of 18 years will have their safety management systems inspected. Where appropriate, a licence is then issued. As from the 1<sup>st</sup> April 2007 responsibility for implementing the regulations was transferred to the Health and Safety Executive (HSE).

**The following activities require that the centre / venue hold a valid licence:**

CLIMBING	WATERSPORTS	TREKKING	CAVING
Rock climbing	Canoeing	Hill walking	Caving
Abseiling	Kayaking	Mountaineering	Pot-holing
Ice climbing	Dragon boating	Fell running	Mine exploration
Gorge walking	Wave skiing	Orienteering	
Ghyll scrambling	White-water rafting	Pony trekking	
Sea level traversing	Improvised rafting	Off Road Cycling	
	Sailing	Off-piste skiing	
	Sail boarding		
	Windsurfing		

<http://www.aals.org.uk/documents/AALR2004StatutoryInstruments.doc>

Local authorities are treated in the same way as other providers in that if they offer facilities for adventure activities regardless if payment is received or not;

Local authorities do not need a licence for facilities for adventure activities they offer free of charge.

**A license is not required for:**

- Voluntary associations offering activities to their members, (e.g. scout groups, local canoe clubs, etc.);
- Schools and colleges offering activities only to their own students or students;
- Activities where youngsters are each accompanied by their parent or legally appointed guardian. (Does not include teacher or youth leader).

**Swimming or paddling in the ocean & swimming pools**

Swimming and paddling in the ocean or other natural waters including swimming pools are potentially hazardous activities for a school group. They should only be allowed as formal and supervised activities, preferably in recognized bathing areas which have official surveillance i.e. qualified lifeguard cover.

The group leader, or another designated teacher in the group, should hold a relevant life saving award where lifeguard cover may not be available.

The group leader should assess the risks and consider an appropriate safe supervision level for their particular group before the activity takes place.

#### **The group leader should:**

be aware that many children who drown are strong swimmers;  
ascertain for themselves the level of the student's swimming ability;  
be aware of the local conditions - such as currents, weeds, a shelving, uneven or unstable bottom - using local information from the lifeguard, coastguard, harbour master, police or tourist information office;  
designate a safe area of water for use by the group;  
be aware of the dangerous effects of sudden immersion in cold water;  
be aware of the dangers of paddling especially for young students;  
ensure that students have not eaten (at least half an hour) before swimming;  
ensure the activity is suitable for the students, especially any with disabilities;  
adopt and explain the signals of distress and recall.

#### ***Overnight stays***

Organisers/Leaders are reminded, particularly of:

- preliminary visit;
- means of escape/fire drill;
- security of cash/equipment;
- daily briefing for students;
- Hospital/doctor – address and telephone number.

#### ***Sleepovers***

The following advice has been given by the following emergency services:

**Fire:** The Fire Brigade advise that for sleepovers in schools there is no special provision except normal fire precautions – alarms, extinguishers etc. It is however strongly recommended that there is an adult awake at all times. Also that there must be adequate space between the 'beds', sleeping mats or similar and escape routes should be kept clear. The local station can be informed that there will be people on site during the night

**Police:** It is recommended that on the actual evening of the event a call be made to the local station alerting them to the presence of people on site throughout the night.

*The administration of medication on sleepovers should be in accordance with the school's **Medical Room Policy**.*

#### ***Extra-curricular clubs***

Where activities such as chess competitions, football matches or swimming take place away from the school site, they should be governed by these guidelines. If adventurous activities are involved, then please consult the relevant guidelines.

One of the distinguishing features of these types of activities is that they are often arranged in the form of termly programmes. It is, therefore, acceptable when preparing and planning for them, to do so on a "block basis". This could cover such areas as approval procedures and information for parents. Where this happens, it is, of course, important to update parents about any changes to the original programme.

#### ***Guidance on Investigations Carried Out in Particular Locations***

Visits/Journeys may be undertaken for the sole purpose of carrying out an investigation or an investigation may form part of a broader programme of activities; in either case hazards or adventurous activities may also be involved.

Those planning investigations will, therefore, need to bear in mind not only the specific information contained in this section but also the more general guidance which relates to visits and journeys (in this country and overseas).

The nature of some investigations may mean that more stringent supervision and staffing ratios will need to be considered.

### **Farms and zoos**

Farms can be dangerous even for the people who work on them. Taking children to a farm should be carefully planned. The risks to be assessed should include those arising from the misuse of farm machinery and the hazards associated with *E coli 0157* food poisoning and other infections. Check that the farm is well-managed; that it has a good reputation for safety standards and animal welfare; and that it maintains good washing facilities and clean grounds and public areas. Consider the merits of an exploratory visit.

There are some basic safety rules.

#### **Never let students:**

- place their faces against the animals or put their hands in their own mouths after feeding the animals;
- eat until they have washed their hands;
- sample any animal foodstuffs;
- drink from farm taps (other than in designated public facilities);
- ride on tractors or other machines;
- play in the farm area.

Further information on this type of visit can be found using the link below.

<http://www.face-online.org.uk/resources/preventing-or-controlling-ill-health-from-animal-contact-at-visitor-attractions-industry-code-of-practice>

### **Roads/Pathways/Crossings/Railway Crossings**

- Staff members should be fully conversant with the relevant section of the Highway Code;
- Students should walk two abreast or in small groups of two or three with adult supervision at the front and rear;
- All students should know the green cross code;
- Pedestrian crossings should be used whenever possible;
- Crossing should be avoided near corners and bridges. Junctions should be avoided except where crossing at a junction improves sight lines of oncoming traffic;
- Staff members have no authority to stop traffic;
- Particular care should be taken in wet weather, in poor daylight or darkness and light coloured or fluorescent/reflective clothing should be worn;
- Students should show consideration to other users of footpaths;
- Where there are particular hazards, police advice should be sought.

### **Shopping centres**

- Group size needs to be carefully considered. Visits by large groups should be agreed with the shopping centre management;
- A special briefing should be given on shoplifting and receipts obtained for all purchases.

### **Group work**

Where it is considered appropriate and safe for students to work and carry out investigations in small groups it is advisable that this should not be in groups of less than three. In such cases students must be given a rendezvous time and meeting up point before dispersal.

### **Staff and student identification**

In areas where there are many other people it is useful to be able to identify the group easily. This group identification can be achieved by matching baseball caps, rucksacks, clipboards etc. Students should not wear name labels or anything that identifies the names of group leaders.

### **Joint ventures**

- A journey or a visit jointly arranged with another school is perfectly acceptable but it is important that no uncertainty is allowed to arise about roles and responsibilities;
- Staff members from each school should be included in the party and the schools should decide who will be visit leader. This will normally be the staff member who is most experienced with visits/journeys or the most skilled as regards the activities being undertaken. If it is not obvious, then it would be normal to choose a staff member from the school with the largest representation;
- Some joint activities are steered by a committee. The committee must ensure that all risk assessments are in place and that all participating schools are aware of the risk assessment and its content.

### **Further information**

There is a lot of useful guidance on planning, assessing and managing school journeys available to organisers and leaders. The links below will provide information that is useful for a range of visits and journeys.

Outdoor Education Advisers Panel National Guidance <http://oepnq.info/>

- Health and Safety Executive School Trips <http://www.hse.gov.uk/services/education/school-trips.htm>
- The Adventure Activities Licensing Authority <http://www.hse.gov.uk/aala/index.htm>
- Council for Learning Outside of the Classroom <http://www.lotc.org.uk/>
- The British Activity Providers Association <http://www.thebapa.org.uk/>
- The School Travel Forum <http://www.schooltravelforum.com/>
- ROSPA Water Safety Advice <http://www.rospa.com/leisure-safety/water/advice/>
- Duke of Edinburgh Award Information for Leaders <http://www.dofe.info/en/content/cms/leaders/>
- Department for Education Health and safety: advice on legal duties and powers [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/335111/DfE\\_Health\\_and\\_Safety\\_Advice\\_06\\_02\\_14.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/335111/DfE_Health_and_Safety_Advice_06_02_14.pdf)

## **Supervision Requirements for Sport Fixtures (Secondary School Only)**

Where they are short term journeys for regular activities, such as transportation to extra-curricular sports activities, then it may be possible to exceed the supervision levels and guidance in the School Journey Policy. Particular care must be taken to ensure additional risk assessment is brought in as a result of exceeding the supervision levels. For example, guidance is clear in that drivers should not normally be responsible for supervision, but exception can be made and “driver supervision may be sufficient if a small number of older children are being taken on a short journey”.

If the decision has been made by the Group Leader to exceed the supervision levels, then all of the criteria below must be met before the journey starts:

- Year 8 students and above only;
- Any student with history of poor / disruptive behaviour cannot be carried in minibus with only driver on board;
- Journey can only be local;
- Risk assessment must be completed identifying reasons why supervision levels lower than this policy are acceptable;
- Evidence of driver experience / competence in driving minibus / leading journeys should be checked;
- Students should be briefed in procedures if there is an incident on the visit.