



# Bridge Academy Trust

## TRIPS & VISIT POLICY

September 2019

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Period of Consultation (if required)	From	To
Trustees Committee Reviewing Document:	Full Board of Trustees	
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#### **Amendments as at November 2018**

3.2 – Removed the need to report all trips to the LGB

4.1 – Added with the exception of Local Area Visits (LAV)

4.5 – Added details for the trip need to be sent to the Clerk to the Trust, who in turn will notify appointed Trustee

4.6 – Added with the exception of LAV

4.13.5 – changed ratio from 1:8 to 1:10 and Junior/Infants to Key Stage 1&2

4.39 – Added with the exception of LAV

4.43 – Added with the exception of LAV

5.6 – deleted 5.7 (allowed to purchase alcohol discretely to bring home) added this is no longer allowed

5.14 – Added Paediatric trained staff required for nursery/foundation stage aged students

6.1 – changed to local EVC to advise Trust Business Team

6.5 – added must be completed for residential, overseas etc. and desirable for all others

Removed Appendix 5 template risk assessment – as it is not referenced in the policy and all templates are available from the EVOLVE system.

Added Appendix 5 Local Area Visit annual consent

Added Appendix 6 Use Of Personal Car To Transport Students Form (see points to consider below)

Added Appendix 7 Educational Visit Action Plan

4.12.6 added Nursery ratio – there is no long any statutory minimum requirements

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# INTRODUCTION

- 1.1. The Trust is first and foremost a place of learning, '**where people Enjoy, Enrich and Achieve**'. We have an ethos in which students of all abilities feel valued so that they are able to reach their full potential. They:
  - **ENJOY** coming to school and the various learning experiences available to them.
  - Are **ENRICHED** with a wealth of opportunities inside and outside of lessons and the curriculum, so that all talents are identified and nurtured.
  - **ACHIEVE** high standards:
    - **Academically**, in terms of examination results.
    - **Personally**, through their respect for others and their environment.
    - **Socially**, through their contribution to the life of the school and wider community.
- 1.2. The Trust takes the health, safety and wellbeing of its staff and students very seriously. We comply with our responsibility as stated in the Health and Safety at Work Act 1974. This policy has been designed in line with the Department for Education (DfE) and Health and Safety Executive (HSE)'s guidance and details our responsibilities for students while out on school trips and visits. It is essential that staff contemplating or organising any school trip or visit should read this policy in conjunction with the following supporting documentation before doing so:
  - 1.2.1. The OEAP National Guidance – Guidance for the Management of Outdoor learning, Off-site visits and Learning Outside the Classroom [www.oeapng.info/guidance-by-role](http://www.oeapng.info/guidance-by-role).

## SCOPE

- 2.1. The Trust has a strong commitment to the added value of learning beyond the statutory school day and school premises. It is agreed that visits during the school day should have a clear educational purpose.
- 2.2. Every year each school arranges numerous educational visits which support the aims of the Trust, these include:
  - 2.2.1. Inter school team sports, such as football and netball
  - 2.2.2. Regular nearby visits (libraries, parks, shops, places of worship)
  - 2.2.3. Day visits (theatres, museums, art galleries, environmental activities)
  - 2.2.4. Residential visits and activities which might be classed as adventurous

## ROLES & RESPONSIBILITIES

### TRUSTEES

- 3.1. The Trustees have overall responsibility for the implementation of the Trips and Visits Policy and ensure that it does not discriminate on any grounds, including but not limited to: ethnicity/national origin, culture, religion, gender, disability or sexual orientation.
- 3.2. For trips that are residential, overseas or includes adventurous activities authorisation will be obtained at the outset (see point 4.5) and the Essex Outdoors EVOLVE team will be used to

support the approval process. For all other trips, authorisation has been delegated to the Senior Leadership Team (SLT) at each school.

## **HEADTEACHER/HEAD OF SCHOOL**

- 3.3. The Headteacher/Head of School will be responsible for the implementation and management of the Trips and Visits Policy, not following this policy could be deemed gross misconduct as it involves the safeguarding and wellbeing of children in our care.
- 3.4. The Headteacher/Head of School with the support from the Local Authority has the delegated authority to approve trips and visits which are either residential, overseas or include adventurous activities.
- 3.5. Day to day administration of this policy could be delegated to a general administrator.

## **EDUCATIONAL VISITS CO-ORDINATOR (EVC)**

- 3.6. Under the statutory guidance which came into effect on 1st March 2004, all schools are required to have a named EVC, who will ensure that the planning and supervision of all visits and adventurous activities meet the DfE requirements and LA guidelines.
- 3.7. The qualified EVC located within each school has the delegated authority to approve trips and visits which are local and one day visits.

## **TRIP LEADER**

- 3.8. The designated member of staff in charge of the trip is 'in loco parentis' and has a duty of care to all members of the party.
- 3.9. Trip leaders must plan and obtain approval in line with this policy, including liaising with all stakeholders.
- 3.10. Trip leaders must liaise with the Year Team Leaders to identify students who may require extra support.

## **ALL STAFF & VOLUNTEERS**

- 3.11. All staff and volunteers must notify the trip leader of any medical/dietary needs that they have which may need to be risk assessed (i.e. anaphylactic, diabetic etc.).
- 3.12. All staff and volunteers are responsible for following this policy and acting in the best interest of the students under instruction from the trip leader.

## **DUKE OF EDINBURGH CO-ORDINATORS**

- 3.13. The staff with responsibilities for coordinating the Duke of Edinburgh Award should consider this policy in conjunction with the Essex County Council Standards for Duke of Edinburgh Expeditions and see section 9 for exemptions to this policy specific to the D of E Award.

## **BEFORE ALL TRIPS**

- 4.1. It is a **requirement** that appendix 3 is signed and completed prior to any residential, overseas or adventurous trip and **recommended** for all other trips and visits (with the exception of visits that fall within the Local Area Visits part of this Policy).

## PRE-AUTHORISATION

- 4.2. The trip leader must obtain pre-authorisation by completing the 'Trips and Visits Application Form' (see appendix 1).
- 4.3. The trip leader must liaise with the relevant staff to ensure staffing, cover, school calendar and finances have been considered.
- 4.4. For trip and visit requests that do not have any financial implications to the students or school organising the trip (i.e. cover costs etc.) then the Headteacher/Head of School can approve/decline as appropriate.
- 4.5. All other trips and visit requests will be discussed by each school's SLT and approved/declined as appropriate, for residential, overseas, or adventurous trips a nominated Trustee's approval will also be required, please send details of the trip to the Clerk to the Trust.

## TRAINING

- 4.6. All trip leaders must be competent to lead a visit at the discretion of the EVC. It is recommended that they must be able to evidence that they have successfully deputised or participated on previous similar visits before they can lead. This is **essential** for trips which are residential, overseas and/or adventurous.
- 4.7. The Trust will provide training in conjunction with Essex Outdoors on an annual basis to support trip leaders and staff accompanying school visits. It is the responsibility for staff to update their personal record on EVOLVE for any relevant training they may have received.

## STAFFING

- 4.8. Trip leaders may be teaching or support staff providing there is evidence to support that they have the competencies to carry out the responsibilities of this role.
- 4.9. For residential trips, it is a requirement that at least one member of staff attending the trip is a qualified teacher, however this does not have to be the trip leader.
- 4.10. There must be sufficient staff to cope in an emergency, this maybe a combination of teaching staff, support staff and volunteers however all will be appropriately competent to carry out their responsibilities.
- 4.11. Staffing ratios are a risk management issue, and should be determined through the process of risk assessment. It is not possible to set down definitive staff/participant ratios for a particular age group or activity, therefore the following bullet points should only be considered for guidance.
- 4.12. All trips which have over 20 students the ratio is detailed below and **does not include** the trip leader:
  - 4.12.1 Overseas: 1:15
  - 4.12.2 Residential: 1:15
  - 4.12.3 Adventurous: 1:10
  - 4.12.4 Other: 1:20
  - 4.12.5 Key Stage 1 & 2 only: 1:10
  - 4.12.6 Nursery: Determined by risk assessment

- 4.13. For trips which have under 20 students a minimum of 2 staff will be required with the exception of trips for key stage 5 students only (see point 4.12) or the visit is to another educational establishment within a 3 mile radius with under 10 students one member of staff may be considered. This must be included in the risk assessment.
- 4.14. For key stage 5 trips which have under 20 students making their own way to the venue then one member of staff may be considered. This must be included in the risk assessment.
- 4.15. For all residential, overseas and adventurous trips and visits, a mix of gender supervision is **required** and is **desirable** on day trips. Where this may not be achievable, a discussion with the Headteacher/Head of School will be required and a risk assessment put in place.

## **VOLUNTEERS AND ADDITIONAL PAYING ADULTS**

- 4.16. The Trust welcomes volunteers to support our trips and visits programme, however volunteers must only be used after staff at each school are given the opportunity to assist on the trip as the Trust can ensure staff have the appropriate training and skills.
- 4.17. Volunteers are seen by students as safe and trustworthy adults and the same high standards of safer recruitment principles and processes are applied to volunteers as are applied to paid staff.
- 4.18. All volunteers (including parents) must be entered on to the Single Central Record (SCR) with an annual DBS check completed by the relevant school.
- 4.19. Volunteers will be given clear and simple description of the roles and boundaries expected of them whilst supporting the trip.
- 4.20. There may be instances where it is necessary/acceptable for additional adults to join the trip who are prepared to pay in full.
  - 4.20.1 If the paying adults are employed by the Trust there is no further action required, however the trip leader must clarify the participation and responsibility levels the paying adult is willing to undertake before the trip departs.
  - 4.20.2 If the paying adult is NOT employed by Trust then the Headteacher/Head of School MUST give written consent for attendance. A letter outlining the clear mutually agreed expectations should be sent to the paying adult by the trip leader.

## **EXCLUDING CHILDREN FROM EDUCATIONAL VISITS**

- 4.21. Social Inclusion and Disability Discrimination Act have placed particular responsibilities on schools to ensure that all students are given the opportunity to take part in educational visits.
- 4.22. Where possible, visits will be adapted to enable students with SEN and Disabilities to take part. If this is not possible, an alternative activity of equal educational value will be arranged for the student.
- 4.23. Where a trip leader believes there are special circumstances which may preclude a student from taking part in an educational visit, the individual case should be discussed with a member of the relevant school's SLT and the Trust Business Team in sufficient time to discuss the matter with parents.



## **FINANCE & BUDGET**

- 4.24. Before communicating with students and parents a 'trips and visits budget calculator' (see appendix 2) must be completed by the trip leader and approved by the relevant EVC (see point 3.5 – 3.7).
- 4.25. The trip leader must take consideration to ensure the trip does not go into deficit, however unnecessary costs cannot be passed on to parents, all costs must be deemed appropriate.
- 4.26. HMRC guidelines on taxable benefits must also be considered by the trip leader, the Trust finance team will be available to assist.
- 4.27. The trip leader must consider payments that may be required whilst on the trip:
  - 4.27.1 School payment cards are available to a small number of staff. If an additional cardholder is necessary then a request to the Trust finance team will be required, 2 or 3 months prior to the trips departure.
  - 4.27.2 Cash will only be provided in exceptional circumstances (e.g. needed for tips).
  - 4.27.3 Cash reimbursements will only be made where there has been an emergency.
- 4.28. It is the responsibility of the trip leaders to ensure the students have paid in full and chase for outstanding payments.
- 4.29. If the relevant school decides or there are medical reasons (a doctor's certificate will be required) why a student cannot attend the trip then a full or part refund will be provided at no detriment to the trip.
- 4.30. When producing letters to parents with a payment plan stipulated, the travel company deadlines must be taken into account to ensure there will be sufficient funds in the trip account.

## **INSURANCE, PASSPORTS, EHIC CARDS, VISAS**

- 4.31. The Trust holds a current trip and visits insurance policy, which covers all current members of staff, students currently on roll and volunteers. Anybody travelling with the party as not one of the above must seek advice from the EVC.
- 4.32. When planning activities of an adventurous nature in the UK, the EVC will check that the provider of the activity holds a current licence.
- 4.33. It is the responsibility of a trip leader to ensure all student passports and visas are valid and in date, this should be completed 6-8 weeks prior to the trip to avoid problems closer to the departure date.
- 4.34. For European trips a valid European Health Insurance Card (EHIC) will be obtained for every student. It is the responsibility of the trip leader to ensure that all cards are received and in date.
- 4.35. All passports (and if applicable visas and EHICs) must be collected and validated by the trip leader 2 weeks prior to departure and stored in the relevant schools safe until as close to the departure time as possible. Measures should be taken to prevent passports etc. from being given to a trip leader overnight.

## **RISK ASSESSMENT & EVOLVE**

- 4.36. All risk assessments must be completed by the trip leader using the EVOLVE system. The EVC may provide support in this process.

- 4.37. The risk assessment process is designed to manage real risks when planning trips. All risks must be considered and appropriate 'action to be taken' must be implemented on the trip.
- 4.38. The following points should be considered when creating a risk assessment:
- 4.38.1 Identify the hazard.
  - 4.38.2 Decide who might be harmed and how.
  - 4.38.3 Evaluate the risks and decide on precaution.
  - 4.38.4 Record your findings and implement them.
  - 4.38.5 Review your assessment and update if necessary.
- 4.39. Trip leaders must ensure they use the EVOLVE system to log and monitor the details of the trip. The information EVOLVE requires includes but not limited to the following:
- 4.39.1 Purpose of visit.
  - 4.39.2 Venue.
  - 4.39.3 Staff attending.
  - 4.39.4 Travel arrangements.
  - 4.39.5 Emergency contacts.
  - 4.39.6 Insurance details.
  - 4.39.7 Full itinerary.
  - 4.39.8 Risk assessments.
  - 4.39.9 Think about a 'Plan B' activity, in case of emergencies and ensure this is included on the itinerary and is risk assessed accordingly.

## **EVC AUTHORISATION**

- 4.40. A trip must not go ahead without EVC approval.
- 4.41. Approval must be obtained with a minimum of 3 weeks before the trip (with the exception of local area visits).
- 4.42. The Trust has agreed that for trips and visits that are residential, overseas or adventurous all completed EVOLVE submissions go to the Local Authority for approval. Each school has signed the Essex County Councils Health and Safety for trips support package.

## **COMMUNICATION**

- 4.43. The trip leader must ensure that all staff supporting are aware of their roles and responsibilities whilst on the trip, and that authorisation has been given from their line manager to attend the trip.
- 4.44. For residential, overseas and adventurous trips a minimum of one parents evening will be required.

## **CONSENT FORMS**

- 4.45. Parental consent must be provided for each trip (with the exception of local area visits) and collated by the trip leader or general administrator located within each school.

## FINAL CHECKS

- 4.46. On the day a register must be taken prior to departure and left at the main reception to enable SIMs/Management Information System to be updated.

## DURING ALL TRIPS

- 5.1. The trip leader is required to follow the itinerary, subject to environmental and current condition factors and when making these decisions **MUST** keep in mind the safety of the students at all times. The 'actions to be taken' from the risk assessments must be adhered to, which were submitted on the EVOLVE system.
- 5.2. The trip leader **MUST NOT ENGAGE IN ANY ACTIVITY WHICH IS NOT ON THE ITINERARY OR RISK ASSESSMENT** (Providing an alternative itinerary prior to the trips departure would be good practice in case of emergencies).

## TRANSPORT

- 5.3. The trip leader must ensure the 'action to be taken' on the travel risk assessment are followed.
- 5.4. The road regulations of the country being visited must be adhered to at all times (e.g. staff to sit by each/all emergency exits).
- 5.5. Coach and taxi companies must be selected from the list of certified companies. If the company is available on the EVOLVE system then Essex County Council have verified the credentials of the company.

## ALCOHOL & SMOKING

- 5.6. **No alcohol** is to be consumed or purchased to be brought home at any time during a trip or visit by either students or staff.
- 5.7. If a member of staff wishes to smoke whilst on a trip or visit it must not be in sight of students, with the highest amount of discretion. The member of staff must ensure that student safety and supervision is not compromised. This includes the use of electronic cigarettes or other smoking devices.
- 5.8. If a member of staff is required to take medication then it must be done with the highest amount of discretion. Obviously the use of recreational substances (legal or illegal) is strictly forbidden.

## MEDICAL & FIRST AID

- 5.9. For a residential, overseas and adventurous trip a nominated member of staff must be made aware of any self-medicating students.
- 5.10. A medical log must be kept for any medication administered to students by the nominated member of staff.
- 5.11. All medical and dietary requirements must be accessible to the trip leader for the duration of the trip or visit.
- 5.12. It is always a benefit to have a First Aid trained member of staff on a trip or visit, however this is no longer a requirement for any trips and visits in the UK.
- 5.13. For trips and visits overseas and/or adventurous the Trust still requires a first aider to accompany the trip or visit.

- 5.14. For trips and visits for nursery/foundation stage aged students a paediatric trained member of staff is required.

## AFTER ALL TRIPS

- 6.1. The trip leader must immediately, on return, report any accidents or incidents to the local EVC, if applicable. This must then be reported to the Trust Business Team who will determine if this need to be reported to RIDDOR.
- 6.2. Receipts for school payment cards are returned promptly to a member of the Trust finance team or Headteachers/Head of School PA with the return of the card.
- 6.3. All paperwork must be confidentially destroyed where there has been NO major incident. In the event of a major incident occurring whilst on a trip all relevant paperwork must be retained by the EVC in accordance with the Records Management Policy. These forms will be stored in a secure area.
- 6.4. Medical kit bags must be returned to the medical room/main reception along with a medical log if any medication was administered to students.
- 6.5. For all residential, overseas and adventurous trips and visits an evaluation form available on the EVOLVE system **must** be completed, it is **desirable** that one is completed for all other trips and visits.

## IF THINGS GO WRONG

- 7.1. All staff attending a trip or visit will be provided with a 'Visits Emergency Action Plan and Log' (see appendix 7). If things go wrong this document should be the first port of call, it includes the following information:
- 7.1.1. What to do in an emergency.
  - 7.1.2. Emergency Contacts.
  - 7.1.3. Accident and injuries log.
  - 7.1.4. Medical log.
  - 7.1.5. More useful information.

## ACCIDENTS & INJURY

- 7.2. In the case of accidents and injuries whilst on a trip or visit in the UK, a full report should be made by the trip leader and the person dealing with the medical situation. The following information must be recorded:
- 7.2.1. Date.
  - 7.2.2. Time.
  - 7.2.3. Name of the Student(s)/staff involved.
  - 7.2.4. What and Where it happened.
- 7.3. In the case of accidents and injuries whilst on a trip or visit abroad:
- 7.3.1. Staff will co-operate fully with the emergency services at the location and understand that any injury or death of a member of staff or student outside of the UK may be subject to the law of the land where the accident occurred.

- 7.3.2. The first point of contact with the UK should be the named emergency contact from the EVOLVE submission, who will then contact the family of the injured person.
- 7.3.3. Students will be asked not to contact family or friends in the UK until the family of the injured person can be contacted.
- 7.3.4. The insurer will be notified by the named emergency contact back in the UK.
- 7.3.5. A full incident log will be kept (see section 7.2 for detail) and reported to the EVC immediately on return.
- 7.3.6. Media enquires must be referred to the named emergency contact from the EVOLVE submission.
- 7.3.7. The British Embassy/Consulate will be informed, if appropriate.

## **LOSS & THEFT**

- 7.4. Where a crime is committed against a member of the party, it will be reported to the local police as soon as possible.
- 7.5. A full incident log will be kept (see section 7.2 for detail) and reported to the EVC immediately on return.

## **OTHER**

- 7.6. Claims for medical expenses need to be recorded accurately, in detail and reported to the EVC immediately on return.

## **DEFINITIONS**

- 8.1. 'In loco parentis' means that staff on any trip or visit have a duty of care over the students in place of parent/carer.
- 8.2. 'Trip or Visit' means any educational visit, foreign exchange trip, day trip or residential visit organised by the Trust for their students to go offsite.
- 8.3. 'Residential' means any trip which includes an overnight stay.
- 8.4. 'Activities of an adventurous nature' includes, but not limited to, activities that involve, trekking, Caving, Skiing, Water Sports or Climbing.

## **DUKE OF EDINBURGH AWARD**

- 9.1. The Trust works in partnership with Essex Outdoors to provide access to the Duke of Edinburgh Bronze, Silver and Gold Awards.
- 9.2. Each applicable school will appoint a lead coordinator who will be responsible for liaising with Essex Outdoors and promoting the Award to students and grouping them accordingly.
- 9.3. Essex Outdoors' have committed to providing the appropriate staffing levels to ensure the safety of the students while participating and to meet the requirements of the Essex County Council Standards for Duke of Edinburgh Expeditions. The Trust will provide staff to accompany the practice and assessed expeditions for pastoral care only (please see 9.4 for expected ratios). These members of staff are not required to hold any Duke of Edinburgh qualifications, however would be desirable. The trip leader must have experience of assisting in this type of trip.

- 9.4. For practice and assessed expeditions, where Essex Outdoors are the external provider, the minimum staff ratios are as follows:
- 9.4.1. 1-28 students 2 members of staff (1 male, 1 female if mixed gender cohort).
  - 9.4.2. 29-63 students 3 members of staff (at least 1 male, 1 female if mixed gender cohort).
- 9.5. Volunteers above the agreed staffing ratios must be approved, in advance, by Essex Outdoors to ensure the adult supervision is not excessive and **no** additional costs for extra volunteers are to be passed on to students.
- 9.6. The Trust staff assisting in the practice or assessed expedition will be provided with a hire vehicle or may claim mileage for 1 vehicle per trip (whichever is most cost effective and agreed in advance as part of the 'trips & visits budget calculator' with the EVC).
- 9.7. The use of the vehicle named in 9.6 is strictly for the use of employed staff members, to be used to transport staff, equipment and supplies. The driver will take full responsibility for the condition of the vehicle and ensure that they adhere to the Highway Code.
- 9.8. Only in exceptional circumstances would staff be permitted to transport a student. An example would be where a student required "more than first aid" and needed to be transported back to camp or to a hospital or if one student in a group (due to progress or condition) was putting the safety of the rest of their group in danger. In these circumstances the Trust staff members would take guidance from the Essex Outdoors assessors and students would need to be aware that this would deem a fail of the award. A log will need to be kept for any students transported by a member of staff and given to the EVC immediately on return.
- 9.9. The number of students for each award has been limited based on the maximum walking group supervision requirements to procure the most cost effective package. They are detailed below and will be reviewed annually:
- 9.9.1. 63 for Bronze
  - 9.9.2. 42 for Silver
  - 9.9.3. 21 for Gold
- 9.10. The current Trust rates of subsistence to be paid at:
- 9.10.1. Breakfast = £5
  - 9.10.2. Lunch = £10
  - 9.10.3. Evening Meal = £10

## LOCAL AREA VISITS

- 10.1. This type of visit can only be used for visit venues within 10 miles of the school providing the trip. The extended area has been selected so all schools within the Multi Academy Trust are within the radius.
- 10.2. There must not be any costs associated with this type of visit that will be requested from the parents.

## OPERATING PROCEDURE

- 10.3. The Headteacher/ Head of School or delegated EVC must provide emailed confirmation to approve the Local Area Visit before the group can leave.

- 10.4. All trips leaders **MUST** attach the necessary risk assessments to the EVOLVE submission see risk assessment section within this policy to assist.
- 10.5. Only members of staff who are judged to be competent to supervise groups depending on the activity will be approved by the EVC.
- 10.6. It is the responsibility for each School within the Trust to ensure that all parents are aware that the school is using the Operating Procedure of the 'Local Area Visit'. An annual consent form must be completed, signed and returned accordingly (see appendix 5).
- 10.7. The staffing ratios set within this policy still apply.
- 10.8. Staff are familiar with the area, including any 'no go areas', and have practiced appropriate management techniques.
- 10.9. The trip leader must ensure that:
  - 10.9.1. Parents are notified before all local area visits.
  - 10.9.2. Students are fully briefed on what to do when crossing the road safely within the group.
  - 10.9.3. Students are fully briefed on what to do if they become separated from the group.
- 10.10. All remotely supervised work in a local area visit is done in a minimum of 3 students.
- 10.11. Students clothing and footwear is checked for appropriateness prior to leaving school.
- 10.12. Staff are aware of any relevant student medical information and ensure that any required medication is available.
- 10.13. Appropriate personal protective equipment is taken when needed (eg gloves, goggles).

# APPENDIX 1 TRIPS AND VISITS APPLICATION FORM

## TRIPS & VISITS APPLICATION

TRIP/VISIT NAME: \_\_\_\_\_ PROPOSED DATE: \_\_\_\_\_

PROPOSED LEADER: \_\_\_\_\_ PROPOSED TIME OF DEPARTURE: \_\_\_\_\_

SUBJECTS RELATED TO: \_\_\_\_\_ LENGTH OF STAY: \_\_\_\_\_

**REMEMBER TO CHECK WITH THE ADMIN TEAM TO ENSURE THERE ARE NO EVENT CONFLICTS AND ENABLE THE TRIP TO BE ADDED TO THE SCHOOL CALENDAR / DIARY**

EDUCATIONAL OR ENRICHMENT PURPOSE: \_\_\_\_\_

ESSENTIAL TO THE CURRICULUM?  
(PLEASE GIVE DETAILS): YES  NO

YES: \_\_\_\_\_

NO BUT: \_\_\_\_\_

IS THE 'TRIPS & VISITS BUDGET FORM' (visits calculator) ATTACHED? YES  NO

NOTES: \_\_\_\_\_

### PROPOSED STUDENT DETAIL

AGE RANGE (Yrs)	TOTAL NUMBERS	SEN?	FSM STUDENTS	IN SCHOOL UNIFORM	PACKED LUNCH	SPENDING MONEY
				Yes / No	Yes / No	Yes / No

HOW ARE YOU ALLOCATING PLACES? \_\_\_\_\_

ARE DEPOSITS REQUIRED? \_\_\_\_\_

### STAFF TO ATTEND

PROPOSED NUMBER OF STAFF	NAMES OF SPECIFIC STAFF REQUIRED (YOU MUST HAVE THIS AGREED)	
	•	•
TEACHER/SUPPORT STAFF RATIO	•	•
	•	•

### AUTHORISATION

DATE OF SLT MEETING: \_\_\_\_\_ SIGNED (SLT): \_\_\_\_\_

TRIP LEADER ADVISED?

APPROVED? YES  NO

YES  NO



# APPENDIX 2 TRIPS AND VISITS BUDGET FORM

## Trips and Visits Budget Form

(All accounts are subject to audit)

<b>Proposed Visit</b>	<input style="width: 100%;" type="text"/>			<b>FINANCE USE ONLY:</b>
<b>Trip Leader</b>	<input style="width: 100%;" type="text"/>			Till Button: _____
<b>Date</b>	<input style="width: 100%;" type="text"/>			Trip Account Code: _____
Proposed number of students	<input style="width: 100%;" type="text"/>			Date on ParentPay/WisePay: _____
Proposed number of staff	<input style="width: 100%;" type="text"/>			ParentPay/WisePay Name: _____
<b>EXPENSES</b>	<b>Price per Student</b>	<b>Total Price</b>		ParentPay/WisePay Name: _____
Accommodation if required	<input style="width: 100%;" type="text"/>	<b>OR</b>	<input style="width: 100%;" type="text"/>	Trip Leader EVOLVE Training: _____
Transport	<input style="width: 100%;" type="text"/>		<input style="width: 100%;" type="text"/>	EVC Signed checklist (for Residential Only): _____
<i>(For UK based trips using a Tour Operator you MUST include VAT for the above 2 elements)</i>				
Entrance Fees for students	<input style="width: 100%;" type="text"/>		<input style="width: 100%;" type="text"/>	<b>Notes:</b>
Refreshments for students	<input style="width: 100%;" type="text"/>		<input style="width: 100%;" type="text"/>	
Other (please state) _____	<input style="width: 100%;" type="text"/>	<b>OR</b>	<input style="width: 100%;" type="text"/>	
Other (please state) _____	<input style="width: 100%;" type="text"/>		<input style="width: 100%;" type="text"/>	
<b>Approved staff costs</b>	<b>Price per Member of Staff</b>			
Entrance Fees for Staff	<input style="width: 100%;" type="text"/>		<input style="width: 100%;" type="text"/>	
Staff Travel (inc notes) _____	<input style="width: 100%;" type="text"/>		<input style="width: 100%;" type="text"/>	
Other (please state) _____	<input style="width: 100%;" type="text"/>		<input style="width: 100%;" type="text"/>	
	0		0	
		<b>Sub Total</b>	0	<b>(A)</b>
<b>INTERNAL EXPENSES</b>				
Do you require any cover for this trip? Yes/No			No	
Cover costs @ 3%			0	Journal Ref: <div style="border: 1px solid black; padding: 10px; text-align: center; margin-top: 10px;">___ GJ - ___</div>
<i>(If required at anytime during the visit)</i>				
Admin, Insurance, Contingency etc			0	
<i>(If (A) is under £2000 = 5%, between £2000 and £10000 = 4%, over £10000 = 3%)</i>				
Reprographics costs @ 30p per student			0	
<i>Emergency contingency whilst on the trip will be covered by Trips Reserve therefore no longer required to be included in the budget calculator.</i>				
<b>Total Expenditure</b>			0	( ) <b>SURPLUS</b> Account closure ___/___/___ balance transferred <b>TO</b> Visit Reserve £ _____
<b>Total Income</b>			#DIV/0!	( ) <b>DEFICIT</b> Account closure ___/___/___ balance transferred <b>FROM</b> Visit Reserve £ _____
<b>COST PER STUDENT</b>			#DIV/0!	Journal Ref: ___ GJ - ___
				<b>Finance &amp; Operations Manager Final Account Sign Off:</b>
Trip Leader	<input style="width: 100%;" type="text"/>	Date	<input style="width: 100%;" type="text"/>	
EVC	<input style="width: 100%;" type="text"/>	Date	<input style="width: 100%;" type="text"/>	

## APPENDIX 3 TRIPS AND VISITS PRE-CHECKLIST

Trip Leader:	Date of the Trip:		
Name of trip:			
	Date	Initial	
Check dates/cover etc. then complete Application and Finance forms (as applicable).			
When did you complete Trip Leader training update _____ or make appointment with EVC for update.			
SLT approval received BEFORE letters sent to students			
Prepare letters – See EVC (EVC ensures legal compliance) Any trip where there is a cost to students a minimum of 6 weeks' notice is required and a deadline date for payment is required 2 weeks prior to departure.			
Send a list of students eligible for the trip to Trips Co-ordinator/Finance Department – To setup an account for the trip on the online payment system, if applicable.			
At closing date confirm final list of students attending.			
Book medical kits and mobile phones with the Medical Officer/Office Staff.			
Send payment chasing letters, using the deadlines stated in the original letter: <ul style="list-style-type: none"> <li>• Can get a brief overview of payments received via the Finance Web System.</li> <li>• For more detail, email Trips Co-ordinator/Finance Department for an up-to-date list from the online payment system.</li> </ul>			
Complete Risk Assessment on the EVOLVE System (EVC will support)  EVOLVE submissions are required a minimum of 3 weeks prior to departure for local, non-residential trips and 5 weeks for residential, overseas and adventurous activities (as these require LA approval).			
Risk Assessments include medical needs of WHOLE party			
Produce an itinerary for the trip to attach to the EVOLVE submission (this can be a detailed plan of the day, provided by the event organiser or a simple word document produced by the trip leader stating the key times and activities throughout the trip.  <b>REMEMBER THAT YOU MUST NOT DEVIATE FROM ANY AGREED ITINERARY</b>			
Arrange a Parent briefing 2 to 3 weeks prior to departure (required for <b>Residential, Overseas and Adventurous Activities</b> ).			
If applicable, collect Passports, EHIC cards and VISAs (make sure to check expiry dates <b>on all</b> , could be done at the above meeting) - store in School Safe, arrange collection with the Trips Co-ordinator/Finance Department.			
Staff all briefed on roles and responsibilities.			
2 weeks before departure/trip hand this completed form to EVC.			

## REMINDERS

Collect Approved Risk Assessment submission from EVC.
On the day of departure, leave a copy of the register at the Reception or Student Services to inform Attendance Officer and Office Staff if any students who you were expected on the trip do not arrive for departure.
Log any accidents or incidents with the local EVC on return
Complete Evaluation form on the EVOLVE system

# APPENDIX 4 MEDICAL/CONSENT FORM

Trips and Visits medical/Consent Form



The Parent/Guardian for the student participating in the Trip/Visit should complete both sides of this form. Please fill in the details required as fully as possible – in the event of your son/daughter requiring emergency treatment this will help medical staff to decide on the most appropriate treatment.

Activity/Visit Location	Date
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Activity/Visit Leader
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**(Please complete in BLOCK CAPITALS)**

Student's Full Name	Form	Date of Birth
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Method of Payment (please tick as appropriate)	Cash/cheque enclosed	Online payment	Date: Receipt Code/Auth No:
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Parent/Guardian's Address During the Trip/Visit
Home Telephone No: Mobile Telephone No:

Family Doctor's Name and Address
Telephone

Alternative contact (for Emergency use only)	Name:	Tel. No:
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I hereby give permission for my son/daughter to attend the aforementioned Trip/Visit.

If it becomes necessary for my son/daughter to receive medical treatment and I cannot be contacted by telephone or any other means to authorise this, I hereby give my general consent for any necessary medical treatment and authorise the Trip/Visit Leader named above (or in his/her absence one of the other members of staff), to sign any document required by the hospital authorities. *(Delete if consent is not given)*

I will inform the Trip/Visit Leader if any of the information given on this form changes before the event takes place.

Name of Parent/Guardian
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Relationship to the student
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Signature
-----------

Date
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## Special Dietary Requirements/Arrangements

**ADDITIONAL CONSENT** (required when students will be involved in physical activities e.g. swimming, canoeing, climbing, skiing etc.)

I consent to my son/daughter taking part in the activities of the trip/visit, which have been explained to me by the Trip Leader.

Signed (Parent/Carer) ..... Date .....

**PARACETAMOL – RESIDENTIAL TRIPS ONLY.** The School will oversee the self-administration of Paracetamol to any student suffering from discomfort (e.g. toothache, period pains etc.).

Please tick this box if you give permission for the school to oversee self-administration of paracetamol by your son/daughter (named overleaf).

In the space below please give details of the following (*even if you have already informed the school in the past*):-

1. Any known infectious diseases with which your son/daughter (named overleaf) has been in contact within the last three weeks (e.g. Chicken Pox, Diphtheria, Measles, Mumps, Rubella, and Whooping Cough etc.)

2. Please list any known Allergies/Sensitivities/Disabilities (e.g. Penicillin, Food Colourings, Travel Sickness, Bed-wetting, Asthma etc.)

3. Where unavoidable the school is willing to oversee the self-administration of prescribed and non-prescription medication during the visit. Please enter below details of any medicines currently being taken (including dosage details), together with the name of the Specialist and Hospital concerned if appropriate. ***If your son/daughter has to take any medicines, the bottle, packet, jar (or any other items) should be clearly labelled with his/her name and the exact dosages, and handed to the trip Leader/First Aider before departure.***

**Signed** (Parent/Carer)..... **Date**

# APPENDIX 5 LOCAL AREA VISIT CONSENT FORM

[Insert school logo] [Insert school name]

## CONSENT FORM FOR LOCAL AREA VISITS & SPORTING FIXTURES

Completing this consent form will allow your son/daughter to attend any off-site activity that is deemed to be a 'Local Area Visit' offered by the school (an example would be a year-group visit to local amenities) as such activities are part of the school's curriculum and will take place during the normal school day.

### Please note the following important information before signing this form:

- The trips and activities covered by this consent include:
  - all 'Local Area Visits' which means the trip or activity takes place within a 10 mile radius of the school and during the school day.
  - off-site sporting fixtures outside the school day.
- You will be notified before all local area visits and you can, if you wish, tell the school that you do not want your son/daughter to take part in any particular school trip or activity.
- You will be giving consent to allow first aid or urgent medical treatment to be administered, if required.

### Medical Information

All medical information for your son/daughter will be obtained from the schools Management Information System. So we can ensure this system is up to date please complete the medical information section below, however it is important that you notify the school throughout the year of any medical changes relating to your son/daughter.

My son/daughter suffers from the following medical condition and/or can take the following medication:

.....  
.....  
.....

I hereby give permission for my child ..... to attend any Local Area Visits or Sporting Fixture arranged for the academic year [Insert year].

Name of Parent/Guardian
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Relationship to the student
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Signature
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Date
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# APPENDIX 6 EMERGENCY VISITS ACTION PLAN

**Essex Educational Visits Team**  
**Critical Incident Action Plan**

Please follow the steps below to help manage critical incidents and emergencies effectively

## Action By Visit Leader

### Start Here

- Safeguard yourself
- Remain calm and assess the situation
- Establish nature and extent of emergency
- Identify people involved and any casualties
- Are emergency services required?

### Check Your Group

- Are the group safe?
- Are all group members accounted for?
- Are all leaders present?
- Have you briefed group to ensure they know what to do to remain safe
- Delegate assistant leaders if possible

### Any Casualties?

- Ensure injured group members are safe
- Call emergency services (999 or 112) as appropriate
- Carry out First Aid to the best of your abilities  
*A - Preserve life B - Prevent condition worsening C - Promote recovery*
- Member of staff to accompany casualty to hospital with relevant medical details
- Staff name and contact number .....
- Who has gone and where .....

### Notify Establishment Base

- Your essential emergency contacts:
- |             |                                     |
|-------------|-------------------------------------|
| Name: ..... | Establishment main phone: .....     |
| Name: ..... | Contact No: 24/7..... Mobile: ..... |
| Name: ..... | Contact No: 24/7..... Mobile: ..... |

### Information needed (Please use notes section overleaf):

- |                                    |                              |                             |
|------------------------------------|------------------------------|-----------------------------|
| <i>What happened?</i>              | <i>When - date and time?</i> | <i>Where - location?</i>    |
| <i>Who was involved / injured?</i> | <i>Names of all involved</i> | <i>Actions taken so far</i> |

### Agree contact numbers to use and pattern of future contact

## Action By Establishment

**Is this a Critical Incident?**

Yes

No

- Launch the Critical Incident Plan
- Follow & adapt if necessary
- Involve outside support if necessary

- Agree actions with Visit Leader
- Contact parents?
- Seek advice from Education Officers?
- Seek advice from Outdoor Education Advisors?
- Media management by establishment?
- Insurance?

### Ongoing

- Record of incident
- Follow-up paperwork
- Actions taken
- Review incident



## Incident notes and recording sheet

When	Who	What	Where
11.30pm	Joe Bloggs	Fell out of bunk bed, staff took him downstairs	Bedroom 12

### Leaders

- Stay calm
- Delegate appropriate tasks to other leaders
- Watch your group and keep them safe
- Do not admit liability
- Witness information
- Photograph the scene
- Do not alter any equipment
- Do not allow anyone to see a group member without an adult being present
- Once group is safe arrange contact with home

### Useful Numbers

**ECC Schools Comms Team**  
+44 (0)1245 434745 (Office Hours)

**ECC Press Office**  
+44 (0)3330 132800  
+44 (0)7717 867525 (Out of hours)

**Educational Visits Team**  
+44 (0)1245 221022

### My Useful Numbers

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