



# Heath Mount School

## **Educational Visits Policy**

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**Heath Mount School, Hertfordshire**

**Independent Day and Boarding School for Boys  
and Girls**

September 2019

## **1. Introduction**

- 1.1. At Heath Mount School (the School), learning outside the classroom is an essential component of the curriculum. It gives pupils unique opportunities to develop their resourcefulness and initiative and to spend time together in an informal environment. Each trip is different and pupils experience is developed on an annual basis, so their skills levels increase with their exposure to challenges. Some trips are related to the curriculum, some are designed to promote social, cultural and or religious awareness and some are designed to enhance physical skills, self-reliance and teamwork.

## **2. Application and Accessibility**

- 2.1. This policy is addressed to members of staff and volunteers. It is a whole school policy. Including the Early Years Foundation (EYFS) provision and applies to any educational visit, which includes, but is not limited to, activities such as trips, visits, tours and field trips.
- 2.2. This policy is available on the School's website and a hard copy can be requested from the School Office. It is also available to staff in the staff rooms and via the policies file on the Staff Drive.

## **3. Legal and Regulatory Framework:**

- 3.1. This policy has been drafted to comply with Keeping Children Safe in Education (2019) (KCSIE) and the DfE advice: 'Health and Safety on Educational Visits (2018)'.

## **4. Trips and visits involving Heath Mount**

- 4.1. The School regularly take pupils to museums, galleries, theatres, workshops, lectures, temples, churches, mosques, outdoor education centres and the like. In the Pre-Prep, trips are arranged on different days to a variety of venues directly related to the curriculum. Throughout the School, there are a variety of curriculum enrichment visits and experiences as well as numerous sporting, academic and musical events.
- 4.2. In addition, there are graded outdoor education experiences for all year groups and trips abroad on a less frequent basis.

## **5. Legal Framework & Responsibilities**

### **5.1. Day Trips**

- 5.1.1. These trips involve a large group of pupils taking part in an excursion or experience, which is off site from the school, but does not involve an overnight stay - These may extend beyond the school day.

### **5.2. Residential Trips**

- 5.2.1. These trips are any trip that involves pupils spending one or more nights away. For all overnight trips where other staff have access to our pupils, the School will apply for an enhanced disclosure from the DBS and a check of the Children's Barred List (now known as an enhanced Check for Regulated Activity). See the School's Recruitment, Selection and Disclosure Policy for further information.

### **5.3. Events**

5.3.1. This category of trip covers a multitude of situations where groups of children are involved in an event which takes them off the regular school timetable. These events will usually, but not always, involve smaller numbers of pupils undertaking an activity, learning experience or fixture at a location that is not regularly visited.

### **5.4. Consent**

5.4.1. For all of the above categories, written consent is required by the school from the parents/guardians. The process for obtaining consent from firstly the Senior Management Team and also parents is outlined in paragraph 12.

5.4.2. A template consent form can be found at Appendix 2.

### **5.5. Safety**

5.5.1. Safety is a top priority. All pupils are expected to follow instructions and behave in a manner appropriate to the occasion.

5.5.2. The School reserves the right to send any pupil home early at their parents' expense, if they decline to follow reasonable instructions given for their own safety or the safety of others.

5.5.3. When planning an activity involving caving, climbing, trekking, skiing or water sports (other than rowing), the Trip Leader must check and confirm with the EVC that the provider holds a licence as required by the Adventure Activities Licensing Regulations 2004. Both the AHOEC and the Council for learning outside the classroom have introduced gold badge award schemes for providers and wherever possible organisations holding these awards should be used. More information can be found at:

<https://lotcqualitybadge.org.uk/> and <https://ahoec.org/about/gold-standard/>

5.5.4. If the proposed organisation does not hold an LOtC Quality Badge, the Group Leader must consult with the Educational Visits Coordinator and arrange for the necessary checks to be undertaken to ensure they are an appropriate organisation to use.

### **5.6. Guidance for staff involved with school visits**

5.6.1. The School has a large number of trips/matches, which are an integral part of the School's educational ethos. The School expects all staff, where possible, to get involved in these activities to endorse their educational value and to follow the protocol for the safe participation of all.

### **5.7. Role of the Educational Visits Coordinator**

5.7.1. Under the statutory guidance, which came into effect on 1st March 2004, all schools are required to have a named Educational Visits Co-ordinator (EVC), who will ensure that the planning and supervision of all visits and adventurous activities meet the DfES requirements and LA guidelines. Patrick Nightingale is the School's Educational Visits Coordinator (EVC). All trips must be approved and sanctioned by the Headmaster. Once approval has been given the EVC will check that organisation is completed, costings

have been done and risk assessments properly documented and approved. The trip must not take place until all of the above has taken place and the EVC has signed off the paperwork. This process is laid out in more detail in paragraphs 12 and 18.

## 5.8. Role & Responsibilities of the Group Leader

- 5.8.1. The Group Leader is responsible for planning and running the trip. Where possible Group Leaders will have made a site visit well in advance of the trip to assess all possible risks and be able to plan in an informed manner.
- 5.8.2. For any residential trip, the Group leader **must** undertake a site visit to risk assess the accommodation and ensure its suitability. If a residential trip is being planned abroad which utilises the services of an established tour company, exception may be made provided that the company can provide floor plans, a detailed risk assessment and are able to provide a remote site inspection to the Group Leader via Facetime or similar. This decision will be made by the EVC in consultation with the Headmaster.
- 5.8.3. Further guidance on the steps that they should follow is set out by the Outdoor Education Advisers' Panel at <https://oeapng.info/>
- 5.8.4. The checklists for residential trips, day trips and events sets out clear guidance on the steps that the Group Leader must follow when planning the trip/event. Group Leaders should complete the relevant Educational Visits Checklist and return to the EVC prior to a visit taking place. Should the Group Leader fail to follow these steps, the EVC may, in consultation with the Headmaster, need to intervene and possibly cancel the proposed trip.
- 5.8.5. The Group Leader must present the completed check list with the risk assessment and other relevant documentation to the EVC at least two weeks in advance of the trip. Full copies of the trip documentation must be given to the school EVC for filing and a copy left with the school based contact.

## 6. First Aid

- 6.1. The level of first aid provision should be based on risk assessment. On all visits, there should be a responsible adult who has a good working knowledge of first aid. The Appointed Person First Aid Certificate is the minimum requirement for residential visits.
- 6.2. First aid kits are available from the Medical Centre. If the visit involves the party splitting up, a kit should be taken for each group.
- 6.3. Group Leaders are responsible for informing the School Nurses and the Catering Department about the trip and for ensuring that all necessary medications/dietary requirements are available on the day. It is then their direct responsibility to ensure that information regarding medical/dietary needs is given to the person who is in charge of that pupil. For the most part, the member of staff carrying the medicine will administer it as per the instructions given by the School Nurses.
- 6.4. Some pupils may administer their own medication and may carry emergency medication (e.g. an epi-pen) with them. Further details about the administration of medicines by staff and pupils may be found in the school's First Aid Policy and standard operating protocols.

## 7. Travel arrangements

- 7.1. Travel arrangements should be included in the risk assessment. If public transport is to be used, all pupils and supervisors must be fully briefed as to procedures on platforms, at bus stops, on busy streets etc.
- 7.2. If travel is by coach or minibus, all pupils must wear a seat belt. Staff must ensure that pupils comply with this rule.
- 7.3. Only members of staff who have received training in accordance with the School's minibus policy may drive the minibus. All journeys must comply with the School Minibus Policy and be a registered School Driver.
- 7.4. If any pupils are to travel by car, the driver must obtain consent from the head, Bursar and parents or guardians. This is also relevant to sports fixtures, and applies to both staff and parents' cars.
- 7.5. The School will check that all vehicles and drivers of vehicles used to transport pupils, are adequately insured.

## 8. Staff Requirements

- 8.1. A working list of groups/Group Leaders and medications must be kept.
- 8.2. Only qualified drivers may drive the school minibus (see section 2.4 above) and there should be at least one person with a valid First Aid certificate on every trip.
- 8.3. For EYFS trips at least one person on the trip **MUST** have a paediatric first aid certificate.
- 8.4. Where Year 3 to 8 trips have both boys and girls in their personnel, there should be a male and a female member of staff in attendance.

## 9. Staff/pupil ratios

- 9.1. The School uses the national guidance set out by the OEAP (Outdoor Education Advisers' Panel) in line with Hertfordshire's Schools. More detailed information and guidance for staff planning a trip can be found at the website <https://oeapng.info/>
- 9.2. As a quick reference guide, the ratios the school recommends are as follows:

Year group	Ratio
Nursery and Reception	1:3 or 1:4 if in an enclosed site
1-2	1:6
3-6	1:8 or 1:10 if in an enclosed site
7-8	1:15

- 9.3. Most of these ratios are in excess of the OEAP (Outdoor Education Advisers' Panel) recommended guidelines.
- 9.4. However, a professional judgement must be made for **each visit**, by the Group Leader, EVC and Headmaster, as a range of characteristics relevant to the particular visit should determine the ratio. These are:

- 9.4.1. Type, duration and level of activity;
  - 9.4.2. Needs of individuals within the group – medical, Special Educational Needs, behaviour;
  - 9.4.3. Experience and competence of staff and accompanying adults;
  - 9.4.4. Nature of venue;
  - 9.4.5. Weather conditions at that time of year;
  - 9.4.6. Nature of transport involved.
- 9.5. The competence of supervisors and the supervision arrangements are more important than ratios.
- 9.6. Pupils must be supervised throughout all visits. In line with the School's safeguarding obligations, it is the Group leader's duty to ensure that pupils remain under the pastoral care and oversight of School staff. Any adults who will be working closely with groups of pupils should be DBS checked and this must form part of the Group Leader's risk assessment. These adults should not be left alone with pupils at any time. Whilst working with pupils, these adults should be supervised or in sight of School staff.
- 9.7. However, there are circumstances when pupils might be unaccompanied by an adult (remote supervision). The decision to allow remote supervision should be based on risk assessment and must take into account factors such as:
- 9.7.1. Prior experience of pupils;
  - 9.7.2. Age of pupils;
  - 9.7.3. Responsibility of pupils;
  - 9.7.4. Competence/ experience of staff;
  - 9.7.5. Environment/ venue.
- 9.8. If remote supervision is planned for as part of a trip, this must be made explicitly clear to parents both in writing as part of the consent form and during the parent briefing. This is to ensure that the position is clear to parents and they can make an informed decision as to whether they are comfortable with the measures which the Group Leader has put in place to safeguard their children.
- 9.9. Supervising adults must be fully briefed on the programme, venue, activities, supervision arrangements and their responsibilities. They must also be given a written list of the pupils in their immediate care.
- 9.10. During longer residential visits it is essential that staff work closely with external staff (when appropriate) to maintain supervision of the children.
- 9.11. It is recommended that staff should refrain from drinking alcohol on school trips. However it is acceptable for staff, who it has been agreed are 'off duty', to drink a moderate amount of alcohol, but this should not interfere with responsibilities and supervision on subsequent days activities or when driving the school minibus (see the school's Staff Handbook for further information). An off duty rota should be

arranged by the Group Leader, so that a minimum of 2 adults are on duty at all times.

## 10. Risk Assessments

- 10.1. 'Risk assessment' is a careful examination of what could cause harm to pupils, staff or others, together with an identification of the control measures necessary in order to reduce risks to a level which, in the professional judgement of the assessor, is deemed to be acceptable (i.e. low).
- 10.2. In considering risk, there are 3 levels of which visit leaders should be mindful:
  - 10.2.1. Generic Risks: normal risks attached to any activity out of school. These will be covered by reference to the Educational Visits Checklists (see appendix), and the school's generic self-assessment.
  - 10.2.2. Event Specific Risks: any significant hazard or risk relating to the specific activity that is not covered in the generic policies. These should be recorded separately and any specific risk assessments requested.
  - 10.2.3. Ongoing Risk: the monitoring of risks throughout the actual visit as circumstances change.
- 10.3. Staff must be aware of the needs and risks associated with individual pupils and not adopt a complacent attitude as a result of previous risk free visits.
- 10.4. Pupils should be involved in risk assessment and management. This may include identifying potential risks and discussing their role in reducing risks (for instance when walking through large cities children should be aware that it is important to stay with their group and be alert to the danger posed by being separated). Through this children will develop risk awareness - an educational issue as well as a safety issue. It is an essential life skill.
- 10.5. The section on Group Safety at Water Margins set out in the National Guidance documentation (<https://oeapng.info/>) must be consulted when assessing risks where the visit involves walking along the seashore, collecting samples in ponds or rivers, or paddling in shallow water. This guidance states that where pupils might participate in learning activities near or in water, such as a walk along a riverbank or seashore, collecting samples in ponds or streams, or paddling or walking in gentle, shallow water, then the guidance contained in OEAP National Guidance *Group Safety at Water Margins* is relevant. All staff should be provided with a copy of this guidance prior to the visit. Safeguarding procedures must also be observed as part of any risk assessment carried out for a trip or visit. The Group Leader must have regard to guidance issued in both *KCSIE*, 2019 and the *Prevent* Duty, 2015. Adults without suitable DBS clearance must not be allowed unsupervised access to children and any trip must be assessed to ensure that children are not exposed to individuals who may encourage radicalisation.
- 10.6. The health and safety of those involved in a visit overrides any disability act (see also the School's Health and Safety Policy).
- 10.7. Further detail on risk assessment may be found in the School's Risk Assessment Policy.
  - 10.7.1. On the day of the visit, staff should:
    - 10.7.1.1. Refer to the Educational Visits Checklists (see Appendices 3 and 4);

- 10.7.1.2. Collect first aid kit(s);
  - 10.7.1.3. Take asthma pumps and Epi-pens as necessary, signed out from reception;
  - 10.7.1.4. Brief supervising adults, including parents;
  - 10.7.1.5. Ensure mobile phones are working, that the office has the number(s) and that they are switched on during the whole visit;
  - 10.7.1.6. Count number of pupils regularly and always when changing locations.
- 10.8. All Group Leaders are expected to have undertaken thorough risk assessments before judging the viability of a trip and the Headmaster has the final say over whether or not a trip will take place. The relevant checklist for the category of trip and a copy of all trip documentation must be given to the EVC before the visit is undertaken.
- 10.9. Group Leaders should:
- 10.9.1. Identify the potential hazards of the place being visited;
  - 10.9.2. List the groups of pupils that are at risk from potential hazards;
  - 10.9.3. Identify how any risks or hazards are going to be managed;
  - 10.9.4. Monitor supervision throughout the trip;
  - 10.9.5. Ensure that the trip is covered by the school's insurance policy (refer to the Bursar).

## **11. Trips abroad**

- 11.1. Overseas trips can have an extra risk and therefore require a higher level of risk assessment. The School will ensure that any organisation that is providing activities holds the LOtC Quality Badge or similar local accreditation.

## **12. Before the trip**

- 12.1. Group Leaders should communicate with parents. Parents should be made fully aware of any likely risks of the visit and their management, so they may consent or refuse on a fully informed basis (known as 'Acknowledgement of Risk'). A letter sent by Group Leaders to parents should therefore give full detail of the visit, the reason for the visit (educational aims), supervision arrangements and the transport arrangements, as well as the venue, date, estimated time of arrival (ETA), estimated time of departure (ETD) of the trip. They should be given clear and concise instructions on requirements for food and clothing and activities being undertaken. Ensure that detail of other incidental activities is included, together with Plan B if appropriate. If there is a cost to the child, this should be clearly stated in the letter.
- 12.2. Residential and Day trips require the parent/guardian of all participating children to complete and return a consent form to the Group Leader. A standard consent form can be found in the appendix. Any adaptations to this consent form must be cleared by the EVC.

- 12.3. A school event does not require the full consent form; however, written permission from participating children's parent/guardian must still be obtained.

### **13. Contingency Planning / Plan B**

- 13.1. Despite the most detailed and careful pre-visit planning, things can go wrong on the day, e.g. a helper is unavailable, a member of staff is ill, transport fails to arrive, a museum has lost the booking. To avoid having to make important decisions under pressure, it is important that some advanced thinking is done to cater for any foreseeable eventuality. This takes the form of a Plan B. Not having a Plan B has been a common cause of accidents and ensuring that there is one forms part of the School's Educational Visits Risk Assessment process.

### **14. Preparation of pupils**

- 14.1. Before the trip pupils should be reminded that they are representing the School to the general public and they should be informed about the following:
  - 14.1.1. Timings;
  - 14.1.2. The member of staff who is responsible for them;
  - 14.1.3. Expectations for behaviour (see the School's Behaviour and Discipline Policy for further details);
  - 14.1.4. Potential risks (see paragraph 10);
  - 14.1.5. Safety during the trip;
  - 14.1.6. Pupils with special or medical needs should be given extra instruction/supervision where applicable.

### **15. During the trip**

- 15.1. Primary responsibility for the safe conduct of the visit rests with the Group Leader. He or she has sole responsibility for altering or amending the itinerary in the event of unexpected circumstances. He/she may delegate responsibility for the following:
  - 15.1.1. Ensuring that all relevant pupil details are being carried;
  - 15.1.2. Carrying out a head count at opportune moments throughout the trip, but always upon arrival and departure;
  - 15.1.3. Checking that pupils are wearing seat belts/safety belts/life jackets;
  - 15.1.4. Checking fire exits and escape routes and ensuring fire exits are clear;
  - 15.1.5. Ensuring accommodation is of a suitable standard;
  - 15.1.6. Setting times/rules for pupils in their rooms;
  - 15.1.7. Enforcing standards of behaviour;
  - 15.1.8. Carrying the correct documentation: this may entail checking that pupils have passports and that passports have 6 months validity after the date of return;

- 15.1.9. Keeping an account of expenditure and receipts;
- 15.1.10. Recording any incidents that occur during the visit.

## 16. Accidents and Emergencies

- 16.1. As part of the trip preparation and risk assessment, the Group Leader will have a plan in place in the event of an emergency, including a communication plan and contact details.
- 16.2. If a pupil has an accident that requires a hospital visit, they should be accompanied to the hospital by the Group Leader or another member of staff. The accompanying person must take all relevant contact details with them. Once the pupil is in the care of the medics, he/she must inform the Headmaster and the pupil's parents.
- 16.3. In the event of a serious accident resulting in major injury or death, the Group Leader's first priority is to summon the emergency services and to arrange for medical attention for any casualties. Other staff should take care of the needs of the rest of the children and inform the Headmaster. At this point, the School's Major Incident Policy would be deployed.
- 16.4. For visits that take place during school hours, the office and EVC hold visit information including itinerary, venue details, names and emergency contact details for all participants including staff. For visits outside school hours, the School based contact must also hold this information or be able to access it quickly.
- 16.5. The EVC evaluates trips and visits after completion and keeps records of incidents, accidents and near misses.

## 17. Expenditure

- 17.1. The group leader is responsible for returning any unused monies to the Finance Office and for providing a schedule of expenditure for the trip.
- 17.2. Trips abroad will follow DCSF Model Policy requirements.

## 18. Booking Procedure

- 18.1. Members of staff proposing to book any trip or event may wish to sound out the Headmaster or members of the Senior Management Team. However it is essential that the correct booking procedures are followed:
  - 18.1.1. Before making any firm bookings, the Group Leader must complete the 'Part A' Form which includes details of dates, costs, implications on the curriculum, children involved etc. and send this to Louise Cook, Registrar.
  - 18.1.2. The proposed trip or event will be considered by the Director of Curriculum, the EVC and Director of Professional Development **before** it is put to the Senior Management Team for approval.
  - 18.1.3. When signed off by the Headmaster this form will be returned to the Group Leader who may then proceed with booking and organising the trip/event.
  - 18.1.4. Dates will be then put into the calendar by the Director of Professional Development.

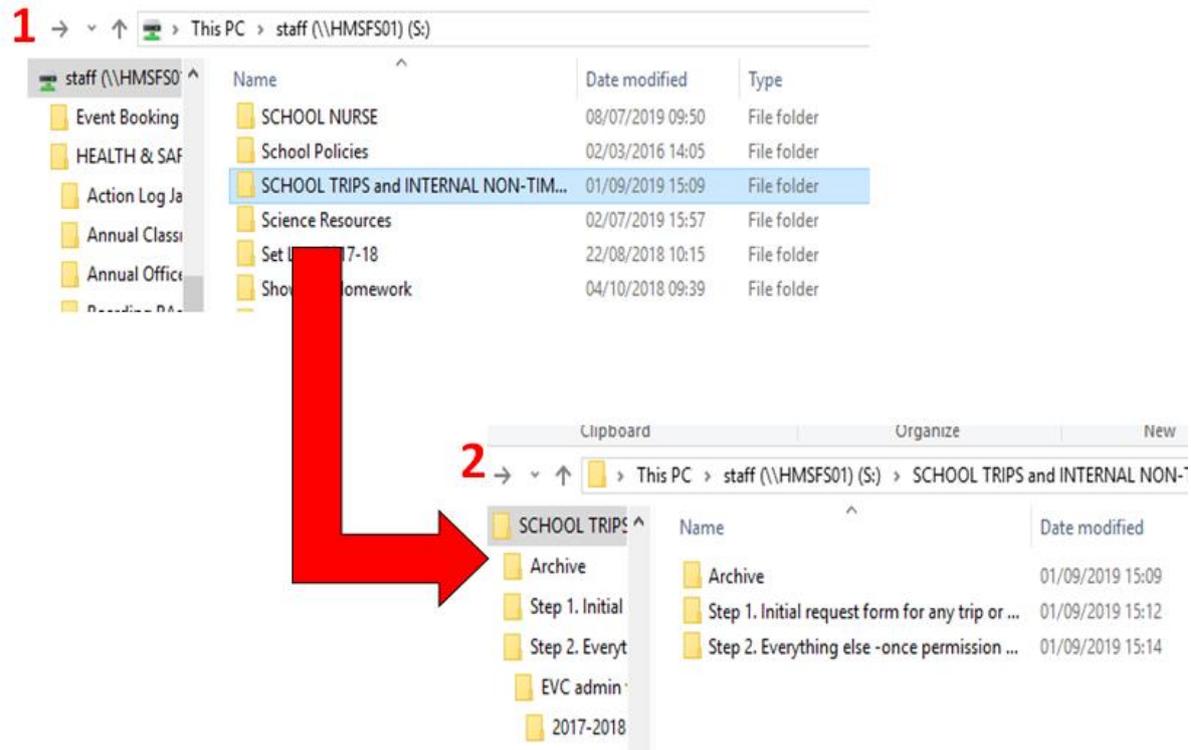
- 18.2. The Group Leader must then work through the relevant checklist, which gives clear guidance on the timeframes and procedures to be followed. These include:
- 18.2.1. Liaise with Finance team over costing and billing arrangements.
  - 18.2.2. Inform parents and obtain consent (See Section 1.2). Letters should be checked by the Head (through his Executive Assistant) who will obtain the Headmaster's approval.
  - 18.2.3. Liaise with Reception and administration staff about booking transport, organising letters, collation of documentation etc.
  - 18.2.4. Carry out pre-visit if possible and complete relevant checklists.
  - 18.2.5. Liaise with School Nurses - A trips medical requests form **must** be submitted at least two weeks before. One first aider must be included on the staffing team.
  - 18.2.6. Organise and collate group lists, medical information, itinerary etc.
  - 18.2.7. Meet with EVC at least two weeks before proposed trip/visit to go through, discuss, and sign off the completed checklist and risk assessments.
  - 18.2.8. Brief both the staff team and pupils on the trip/event.
  - 18.2.9. Once all documentation is completed and signed off by the EVC and Group Leader, the EVC will meet with the Headmaster who will sign the trip off.
  - 18.2.10. If the Head and EVC have not agreed to the trip/event, and the necessary forms are not completed then **THE VISIT MUST NOT GO AHEAD.**

**GO TO THE STAFF DRIVE/TRIPS FOR UP TO DATE RISK ASSESSMENT FORMS AND CHECKLISTS FOR: REQUEST FORM PART 1, SCHOOL EVENTS, DAY AND RESIDENTIAL TRIPS. STAFF SHOULD SAVE THESE BEFORE ADAPTING/COMPLETING.**

## APPENDIX 1

### PROCESS FOR OBTAINING PERMISSION FOR AND PLANNING A SCHOOL TRIP OR EVENT

How to find the forms required when planning a trip, activity or event on the Staff Drive as per below:



1. Complete 'Part A' and submit to Louise Cook, Registrar.
2. EVC will consider whether trip/event is compliant with school policies and check costs against budgets.
3. Director of Curriculum will consider the implications to the curriculum as well as evaluate the net benefits of the proposed trip/event against the best lesson time and disruption to the curriculum.
4. The Director of Professional Development will check the dates against the school calendar and confirm that these are available and convenient.
5. Once signed off by the above, the 'Part A' proposition will be put before the Senior Management Team and, if approved, signed off the Headmaster.
6. Once the Group Leader has the signed off 'Part A' back, they may proceed with the booking of the trip.
7. The relevant checklists will then guide the Group Leader through the process to be followed.

**APPENDIX 2**

**MODEL CONSENT FORM**

**Outdoor Education**  
**Heath Mount School**

**PARENTAL CONSENT FORM**

(Name of trip here)

**(Date of trip here)**

I agree to my son/daughter.....

Taking part in the trip and, having read carefully the information provided, agree to his/her participation in any or all of the activities described. I acknowledge the need for obedience and responsible behaviour on his/her part.

- Does your son/daughter suffer from any conditions requiring medical treatment, including medication? If YES, please give details below.
  
- Is your son/daughter allergic to any medication? If YES, please specify.
  
- Is your son/daughter allergic to any foods, and/or vegetarian? If YES, please specify.
  
- **Essential Medical Information**  
Your child's age:                      and date of birth:        /        /

Your child's doctor's name: \_\_\_\_\_

and doctor's address:

and doctor's telephone number: \_\_\_\_\_

By ticking the boxes below, you give permission for Heath Mount staff to administer the following medications to your child, as and when appropriate;

Calpol (for mild pain/headaches)  Suncream

Piriton (for allergies/rashes)  Plasters

Anthisan (for stings/bites/nettles )  Strepsils

Savlon (antiseptic cream)

• **Emergency contact names and telephone numbers**

1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

***\*Please ensure that you have included a daytime contact number if you are generally unable to take calls on your mobile telephone due to work or other reasons***

I agree to my son/daughter receiving emergency medical treatment, including anaesthetic, as considered necessary by the medical authorities present.

Signed .....

Date .....

***Should the need at any time arise, teachers supervising this school journey will, having made reasonable efforts to contact parents, exercise their power to authorise any medical treatment or surgical procedure for your child which is***

***advised by a qualified medical practitioner. Any parent who for any reason may be unwilling to accept this should consider whether or not to allow his or her child to participate. A parent who allows his or her child to participate will be considered to have accepted the teachers' right to authorise any such treatment or procedure upon the advice of a qualified medical practitioner. Acceptance by one of two parents will be considered to be acceptance by both. Any child who participates in an Outdoor Education event undertakes to behave sensibly and co-operate fully with those in charge for the duration of that event.***

***To comply with our obligations under data protection legislation, this form and the information contained in it will remain confidential and will only be used for the purposes of this trip, for example, in the event of us needing to administer medication to your child or to contact you in an emergency.***

### Appendix 3: Checklists – Checklist for planning a day trip

 <b>Heath Mount School</b>	<b>A Checklist for planning a day trip</b> This check list acts as part of the Risk Assessment
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This document should be signed and dated at each stage in the process. It should be retained by the trip leader and submitted to the EVC (Patrick Nightingale) along with a copy of the staff information booklet. This will then also be signed off by the Headmaster at the end to allow the trip to go ahead.

**Destination/name of trip being planned:**

\_\_\_\_\_

**Date of trip:** \_\_\_\_\_

**Name of trip leader:** \_\_\_\_\_

**Make firm bookings having received permission from SMT to go ahead with your booking** *1-2 terms in advance*

The Trip Leader is responsible for making firm bookings and ensuring costings fall within their

Signed by Trip Leader:	Date:
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**Confirm the date for entry to the calendar to L. Beskeen** *1-2 terms in advance*

Signed by L. Beskeen:	Date:
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**Plan the trip in more detail in discussion with the EVC**

This discussion should include:

- The need for an inspection visit/risk assessment
- Activities
- Staffing; experience, impact on school, first aider
- the need to include the emergency procedures on a school visit checklist in the documentation
- the need to be aware of the schools Critical Incident Plan
- Group management issues
- Contingency plans

**All of these elements should be included in the staff information booklet**

Signed by EVC:	Date:
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**Collection of specific information**  
*advance*

*2-4 weeks in*

Request medical and dietary information from the medical team. Collate the relevant medical and dietary information. This should be added to the staff information booklet.

Name of designated first aider: \_\_\_\_\_

Signed by School Nurse:

Date:

**Inform colleagues of pupils involved in any term time trip**  
**advance**

**4 weeks in**

Send out an email and post details on the relevant notice board. It is better to email all staff than try to be specific and miss someone who needed to know. The trip leader is responsible for ensuring that all relevant information is put on to the 'Week Ahead' document.

Signed by Trip Leader:

Date:

**Carry out a Risk Assessment**  
**advance**

**4 weeks in**

The risk assessment templates are in the 'S' Drive under the School Trips folder. The EVC will be available to help in the process.

In short the procedure is:

- Contact your venue and/or activity provider and ask them for their own risk assessment.
- **If this is a new trip or a new trip leader is taking charge, an actual visit must be undertaken.**
- Work through your visit chronologically identifying any hazards, how you plan to minimise the risk and who you need to brief about it.
- Refer to the venues own risk assessment where appropriate.
- Identify any special needs amongst the children and adjust your staffing requirements accordingly.
- **Risk Assess your Plan B as well.** If your trip is influenced by the weather, tides etc. It is vital to have a Plan B. Pressing ahead regardless can have consequences way beyond just being uncomfortable and getting wet.
- Adjust your plans in the light of this process.
- Submit the completed sheet to the EVC who will either suggest amendments or additions or simply sign it for the file.

**Divide your pupils into "counting groups"**  
**advance**

**3 weeks in**

It is recognised good practice to divide large groups in to smaller counting groups thus minimising the risk of miss-counting. This is particularly important in crowded public areas where assembling a large group would be difficult. Allocate the pupils to the staff. Counting group lists should be included in the staff information booklet which the other supervisors carry at all times. Where possible the group leader should not have a group allocated to them.

**Brief the staff on the trip**  
**advance**

**1-2 weeks in**

All those on the trip must have a copy of the staff information booklet which will include:

- the travel arrangements, trip itinerary, and activities
- the risk assessment
- medical and dietary information
- kit requirements
- counting group allocation (and any special requirements)
- allocation of specific responsibilities, ie a first aider (who should liaise with matron regarding first aid kits, inhalers, epipens, specific medication which may need to be administered etc)

Instructors will lead activity sessions but Heath Mount Staff retain ultimate responsibility for pupil safety and must exercise their judgement at all times.

Signed by Trip Leader:

Date:

### **Pupil Briefing** **advance**

*1-2 weeks in*

The pupils should:

- know the aims of the trip
- be reminded of timings/necessary kit etc
- know a rough itinerary including all travel details
- have a clear understanding of the required levels of behaviour on the trip
- Trip leaders, in their trip briefing to pupils before a trip departs must instruct pupils that at times on the trip when they are told to stay with their group leader that they must do just that so that we always know that everyone is accounted for.
- They must listen closely to any instructions given by the trip leader, group leader, or anybody else in a position of authority very carefully at all times on the trip.

Signed by Trip Leader:

Date:

### **Manage the finances in conjunction with the Bursary/ Curriculum budget holder (PN)** **On-going**

The Trip Leader must keep track of all expenditure before, during and after the visit.

- All receipts must be kept and spending should be itemised for presentation to the Bursary.
- Petty cash must be requested two weeks in advance.

Signed by Bursar/PN:

Date:

### **Ongoing risk assessment during the visit** **going**

**On-**

Throughout the visit the Trip Leader must be ready and willing to make potentially difficult decisions in the interest of the smooth running of the trip and most importantly to maintain the safety of all concerned. Having a Plan B is vital. Trip Leaders should be ready to adjust the plans as a result of:

- the weather
- illness or injury
- the condition of the group
- travel problems
- problems with accommodation
- staffing issues
- behavioural issues
- a million other unforeseen circumstances

### **Evaluation of the visit** **PN)**

*Within 2 weeks of the trip returning (a copy to*

After all trips the group leader should carry out an evaluation of the trip with staff who accompanied the trip. This should include:

- the success of the trip in relation to its objectives
- the arrangements if it is to be repeated

- the finances
- the accuracy of the risk assessment

**Final sign off for the trip**  
**advance**

**I-2 weeks in**

Once all paperwork is complete the trip leader, EVC and Headmaster should sign below. This signifies that we are all satisfied that the trip has been planned, staffed and risk assessed thoroughly and that we are happy for it to proceed as planned.

Signed by Trip Leader:	Date:
Signed by EVC:	Date:
Signed by Headmaster:	Date:

## Appendix 4: Checklists – Checklist for planning a residential trip

 <p><b>Heath Mount School</b></p>	<p><b>A Checklist for planning and leading a residential trip</b></p> <p>This check list acts as part of the Risk Assessment</p>
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**Name/destination of trip:**

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**Name of Trip Leader:**

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***This checklist is designed to help trip leaders with their trip planning and ensure that every possible avenue has been covered. It is essential that you as a trip leader follow the stages outlined in this document. If you have any questions or need any help please contact the EVC.***

This document must then signed and dated at each stage in the process. It should be retained by the trip leader and submitted to the EVC (Patrick Nightingale) along with a copy of the staff information booklet. This will then also be signed off by the Headmaster at the end to allow the trip to go ahead. Louise Cook is the official member of the office staff who oversees trip administration and she will continue in this important role.

**Obtain support for your visit from SMT**

***Ideally 1 year in advance of the trip***

You should not proceed with any bookings until you have received back the completed and signed 'Permission request form' once SMT have considered and approved your proposal.

SMT will consider:

- Clashes across Sections and Departments
- Avoiding congested times of the term and year
- Meeting the school's aims for trips and visits in general

**Permission will only be granted for visits during the current term in exceptional circumstances.**

**Make firm bookings**  
***advance***

***At least 1 year in***

The Trip Leader is responsible for making firm bookings and ensuring costings fall within their

Signed by Trip Leader:

Date:

**Submit the date for entry to the calendar to Lee Beskeen**

Signed by Lee Beskeen:

Date:

## **Plan the trip in more detail in discussion with the EVC**

This discussion should include:

- The need for an inspection visit/risk assessments
- Communication with parents – set up a date for a pupil and parents information evening (add to calendar)
- Communication with other sections and departments
- Activities, licensing and safety, safeguarding checks etc.
- Specific staffing – balance of experience and staff, impact on school for term time visits, the need for a first aider etc.
- Group management issues – counting groups, lost and lonely cards, etc
- Contingency plans
- Specific transport arrangements
- kit and clothing requirements
- apply for visa exemptions if required
- allocation of places (wording in any correspondence with parents)
- the need to include the emergency procedures on a school visit checklist in the documentation
- the need to be aware of the schools Critical Incident Plan
- Communication (School Mobile, text message etc)

**All of these elements should be included in the staff information booklet**

Signed by EVC:	Date:
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## **Cancellation procedures and policy.**

Before sending out the initial letter the trip leader must ascertain what the cancellation policies are of any companies being booked with. **This information must be sent to, and checked with, Gail in the Finance Office**, and the relevant details factored into the trip planning and communicated to parents.

### **Initial letter and sign up** **advance**

**2-3 terms in**

A letter including details of dates and times, travel arrangements, activities (including those that will be part of your 'Plan B', staffing, rough costs, insurance and any additional kit or equipment requirements. This may, at this point, also include the details of an information evening for parents.

- Our trips 'Terms & Conditions' form. These include behaviour caveats, pupil code of conduct and cancellation arrangements. A deposit should also be asked for at this point when the parents are paying for the trip. Please liaise with the bursary regarding this sum.
- Send out the forms and set deadlines for the collection of any necessary information, visa requirements etc.

### **Collection of specific information once places have been confirmed**

**1-2 terms in**

**advance** Send the next set of forms out to the parents.

- Indemnity form
- Medical consent (including details of three emergency contacts)
- Dietary requirements
- Parents should be reminded that the 'Primary Contact' as registered on the school database will be used for text messages during the trip. They must contact the trip leader individually if this needs to be changed for the trip eg the parents are away and a relative is collecting.
- Set dates for the collection of passports, pocket money and EHICs if required
- Set deadlines for the return of this information

**Parent and Pupil Briefing**  
***departing***

***In the term of the trip***

The parents and pupils should

- know the aims of the trip
- receive an information handout of the powerpoint/presentation details
- be reminded of timings/necessary kit etc
- be given a rough itinerary including all travel details
- be informed as to how their children will be supervised and kept safe throughout the trip
- be informed of how to contact the trip leader/travel company/and how information will flow throughout the trip
- be reminded about collation of information including passports, EHIC cards, pocket money, medicines, etc.
- have a clear understanding of the required levels of behaviour on the trip
- Trip leaders, in their trip briefing to pupils before a trip departs must instruct pupils that at times on the trip when they are told to stay with their group leader that they must do just that so that we always know that everyone is accounted for.
- They must listen closely to any instructions given by the trip leader, group leader, or anybody else in a position of authority very carefully at all times on the trip.

Signed by Trip Leader:

Date:

**Collate the specific pupil information that has been collected**  
***advance***

***6 weeks in***

- Collate the medical and dietary information and then pass it to the School Nurses so that they can check it against the whole school information that they hold. This should be added to the staff information booklet.
- Designate who your trip first aider will be and check with the school nurse that they have been signed off as being competent to undertake this role.

**Designated first aider:**

- If using residential accommodation, dietary/medical requirements should be sent to your contact.

Signed by School Nurse:

Date:

- If traveling abroad then please make 2 photocopies of Passports and EHICs. One for the School Based Contact and the other to be carried separately from the originals. Passport photocopies kept separately from passports.
- Consult the EVC, Deputy Head (pastoral) and VS regarding any other information that may be held on the pupils signed up for the trip. This may highlight behavioural problems, mental health issues, safeguarding concerns and the like.

Signed by EVC:

Date:

**Inform colleagues of pupils involved in any term time trip**  
***advance***

***4 weeks in***

Send out an email and post details on the relevant notice board. It is better to email all staff than try to be specific and miss someone who needed to know.

Signed by Trip Leader:

Date:

**Agree a designated SMT school based contact**  
**advance**

**4 weeks in**

This should be a member of SMT who will be available throughout the trip. The person should be given

- your full itinerary
- a list of all those on the trip
- copies of any consent forms, contact and medical information collected specifically for the trip

Signed by SMT School Based Contact:

Date:

**Carry out a Risk Assessment**  
**advance**

**4 weeks in**

The risk assessment templates are in the 'S' Drive under the School Trips folder. The EVC will be available to help in the process.

In short the procedure is

- Contact your venue and/or activity provider and ask them for their own risk assessment. Check licences etc. If any adults will be working closely with our children then they must be DBS checked.
- If this is a new trip or a new trip leader is taking charge, an actual visit must be undertaken to all venues that will be used. In some instances, it may be acceptable to do the inspection visit remotely but this **MUST** be agreed with the EVC in advance.
- Work through your visit chronologically identifying any hazards, how you plan to minimise the risk and who you need to brief about it. Refer to the venues own risk assessment where appropriate.
- Identify any special needs amongst the children and adjust your staffing requirements accordingly.
- **Risk Assess your Plan B as well.** If your trip is influenced by the weather, tides etc. It is vital to have a Plan B. Pressing ahead regardless can have consequences way beyond just being uncomfortable and getting wet.
- Adjust your plans in the light of this process.
- Submit the completed RA to the Deputy EVC who will either suggest amendments or additions or simply sign it for the file. This should be completed at least 2 weeks in advance.

**THE TRIP LEADER AND THE EVC WILL SIGN THE PRINTED COPY OF THE RISK ASSESSMENT. THIS SHOULD BE ADDED TO THE STAFF INFORMATION BOOKLET AND MUST FORM PART OF THE STAFF BRIEFING**

**Divide your pupils into "counting groups"**  
**advance**

**3 weeks in**

It is recognised good practice to divide large groups in to smaller counting groups thus minimising the risk of miss-counting. This is particularly important in crowded public areas where assembling a large group would be difficult. Allocate the pupils to the staff. Counting group lists should be included in the staff information booklet which the other supervisors carry at all times. Where possible the group leader should not have a group allocated to them.

**Set up a contact group on ISAMS**  
**advance**

**2 weeks in**

- Set up a contact group, or groups for the visit. (There are times when 2 or more groups are needed as a result of split itineraries or travel arrangements.) The Trip Leader, and at least one other member of the party, should know how to send messages using the system.

Signed by Trip Leader:

Date:

**Allocate rooms**  
**advance**

**2 weeks in**

On all residential trips the group leader should allocate rooms in advance but do not inform the children.

- Obtain a room list and plan if available from the accommodation
- The pupils may be given an element of choice in who they share with
- Pupils should not be allocated single rooms
- The location of staff rooms should be considered carefully and labels made for the doors to enable pupils to seek help quickly if required
- Ask the Head of Years to check the proposed allocation

Signed by relevant Heads of Year:

Date:

**Brief the staff on the trip**  
**advance**

**1-2 weeks in**

All those on the trip must have a copy of the staff information booklet which will include:

- the travel arrangements and trip itinerary
- the activities planned
- the risk assessment
- medical and dietary information
- counting group allocation (and any special needs within their group)
- details of the emergency plan
- contact numbers of the Trip Leader and other supervisors
- the school based contact number
- allocation of specific responsibilities. For example, appointment of a Deputy Trip Leader, someone responsible for collecting all medicines/First Aid and a Banker.

Instructors will lead activity sessions but Heath Mount Staff retain ultimate responsibility for pupil safety and must exercise their judgement at all times.

Signed by Trip Leader:

Date:

Whilst Heath Mount does not prohibit the consumption of alcohol\* amongst the staff, consumption should be moderate. The potential need for drivers and first aiders must be taken in to account and at least two members of staff must remain alcohol free at any one time.

*\*Consumption of any alcohol at all is always at the trip leader's discretion.*

Signed by Trip Leader:	Date:
Signed by Deputy Trip Leader:	Date:
Signed by Trip Staff Member:	Date:
Signed by Trip Staff Member:	Date:
Signed by Trip Staff Member:	Date:
Signed by Trip Staff Member:	Date:
Signed by Trip Staff Member:	Date:
Signed by Trip Staff Member:	Date:

**Arrange for the collation of documentation**  
**advance**

**I-2 weeks in**

Organise with the school office, and inform parents, when all documentation should be delivered in to school. Louise Cook will organise all of this and sort into group leader packs. Trip Leader must check all of the documentation. This should all be locked away until the trip departs.

- Passports (all passports should have at least 6 months to run on them)
- Visas
- EHIC Cards
- Medication for the trip; Epipens, asthma inhalers, controlled medication, prescriptions etc (clearly labelled to go to matron to be collated with the first aid kit and handed to the first aider on the trip)
- Pocket Money

**Manage the finances in conjunction with the Bursary**  
**going**

**On-**

The Trip Leader must keep track of all expenditure before, during and after the visit.

- All receipts must be kept and spending should be itemised for presentation to the Bursary on return if required.
- Pre-paid currency cards are available from the Bursary and should be arranged in advance.
- Petty cash must be requested two weeks in advance.
- Book out a school mobile from the bursary and add the number to trip documentation.

Signed by Bursar:	Date:
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**Ongoing risk assessment during the visit**  
**going**

**On-**

This is where the Trip Leader has to actually lead. Throughout the visit the Trip Leader must be ready and willing to make potentially difficult decisions in the interest of the smooth running of the trip and most importantly to maintain the safety of all concerned. Having a Plan B and a flexible itinerary is vital.

Trip Leaders should be ready to adjust the plans as a result of

- the weather
- illness or injury
- the condition of the group
- travel problems
- problems with accommodation
- staffing issues
- behavioural issues
- a million other unforeseen circumstances

**Evaluation of the visit**

***Within 2 weeks of the trip returning (a copy to***

***PN)***

After all trips the group leader should carry out an evaluation of the trip.

This should include discussion on

- the success of the trip in relation to its objectives
- the arrangements if it is to be repeated
- the finances
- the accuracy of the risk assessment

**Final sign-off for the trip, once paperwork is completed**

Signed by Trip Leader:	Date:
Signed by EVC:	Date:
Signed by Headmaster:	Date: