



Heath Mount School

Educational Visits Policy

Heath Mount School, Hertfordshire

**Independent Co-Educational Day and Boarding
School**

September 2024

1. Introduction

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 skill 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

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.

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

This policy has been drafted to comply with the following:

- [Keeping Children Safe in Education \(KCSIE 2024\)](#)
- DfE advice: [Health and Safety on Educational Visits](#)
- [Emergency Planning and Response for Education](#)
- [First Aid in Schools – February 2022](#)
- [Health Protection in Education and Childcare Settings UKHSA, September 2024](#)

4. Trips and visits involving Heath Mount

The School regularly takes 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.

In addition, there are graded residential trips for all year groups and trips abroad on a less frequent basis.

5. Legal framework & responsibilities

Day trips

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.

Residential trips

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.

For trips involving exchanging or homestays, special consideration will be made for additional safeguarding measures. This will include a DBS check in the UK and equivalent in overseas situations, regular check ins with the students and ensuring students have the ability to contact a designated teacher throughout their stay.

Events

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. Risk assessments will need to be done and checked by the EVC in line with the 'Event check list' (Appendix A) rather than 'Day trip check list'. (see Appendix B).

Sporting event: some sports fixtures, competitions, and tournaments, which may or may not take place within school hours, are run at locations which are not educational establishments. A Day Trip checklist should only be completed if a trip is heading to a regularly visited venue (annual trip). These events may need a higher level of scrutiny than regular school fixtures and specific risk assessments and checks should be completed, in line with the 'Event Form Check List for Sport' (Appendix B)

Where sports fixtures are regularly being run by Heath Mount at venues which are not other schools, a standing risk assessment will be generated by the Director of Sport for that venue. These will be considered fixtures rather than events, in terms of oversight, and will not need specific risk assessments to be generated for each one. Heath Mount staff accompanying children to these venues must be familiar with, and adhere to the protocols set out within, these risk assessments. A specific 'Sports event Form' (Appendix C) must be completed before any event takes place.

Consent

For all of the above categories, except fixtures at regular non-school or school venues, or non-residential sports tournaments, written consent is required by the school from the parents/guardians (this includes all residential tournaments and trips). The process for obtaining consent from firstly the Senior Management Team and also parents is outlined in Section 17.

Safety

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

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.

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/>

If the proposed organisation does not hold an LOfC 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.

Guidance for staff involved with school visits

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. So that staff can determine if they need to meet with the EVC, or complete a risk assessment, before taking a group of pupils on a trip, they should refer to the form in Appendix D or go to the relevant button on the Staff Hub.

Role of the Educational Visits Coordinator

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. 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.

Role & responsibilities of the Group Leader

- 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.
- 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.
- Further guidance on the steps that they should follow is set out by the Outdoor Education Advisers' Panel at <https://oeapng.info/>
- The checklists for planning and leading residential trips (Appendix E), and day trips (Appendix F) 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.
- The Group Leader must present the completed checklist with the risk assessment and other relevant documentation to the EVC at least two weeks in advance of the trip. This must be done as a face-to-face meeting where discussion can take place, rather than by emailing documentation. 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

The level of first aid provision should be based on risk assessment and reference to oeapng.info. 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.

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. It is essential that a Medical Information Request Form (Appendix G) is filled out should any child need to take medication on the trip.

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. 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.

As set out in the checklists in the appendices, all trips must have a competent and qualified member of staff designated by the Trip Leader as the medical lead. This member of staff is responsible for keeping and administering medications, keeping records of these and liaising with parents in the event of injury or illness. Contact must be made, and information shared, with parents as soon as practicable. The medical lead must ensure that at the end of the trip/ event they hand over any children who have been injured/unwell to their parents in person and that said injuries are discussed, and any notes handed on. All staff must be able to contact the First Aider on the trip/visit.

7. Travel arrangements

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.

If travel is by coach or minibus, all pupils must wear a seat belt. Staff must ensure that pupils comply with this rule.

Only members of staff who have received training in accordance with the School's transport policy may drive the minibus. All journeys must comply with the School Transport Policy and be a registered School Driver.

If any pupils are to travel by car, the driver must obtain consent from the head or Bursar and parents or guardians of the children involved. This is also relevant to sports fixtures and applies to both staff and parents' cars.

The School will check that all vehicles and drivers of vehicles used to transport pupils, are adequately insured.

Golden Boy and Richmond's coach companies have completed a provider assessment form and are the school's preferred companies to use. These provider assessment forms must be completed at the beginning of each year. Should another transport company be booked, this must be cleared with the EVC who will ensure full compliance and safety checks are carried out.

8. Staff requirements

- A working list of groups/Group Leaders and medications must be kept.
- Only qualified drivers may drive the school minibus and there should be at least one person with a valid First Aid certificate on every trip.
- For EYFS trips at least one person on the trip **MUST** have a paediatric first aid certificate. Lists of First Aiders are available from the Medical Centre.
- 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

- 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/>
- The OEAP no longer recommends specific ratios as it acknowledges that these must be tailored to the needs of the group and activity being undertaken.
- 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

- 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:
- Type, duration and level of activity;
- Needs of individuals within the group – medical, Special Educational Needs, behaviour;
- Experience and competence of staff and accompanying adults;
- Nature of venue;
- Weather conditions at that time of year;
- Nature of transport involved.
- The competence of supervisors and the supervision arrangements are more important than ratios.

- 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.
- However, there are circumstances when pupils might be unaccompanied by an adult (remote supervision). If there is any possibility of these staff being left with children then they must have had a full DBS check in advance of the visit.
- The decision to allow remote supervision should be based on risk assessment and must take into account factors such as:
 - Prior experience of pupils;
 - Age of pupils;
 - Responsibility of pupils;
 - Competence/ experience of staff;
 - Environment/ venue.
- 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. The school has a number of airtag trackers and, where pupils will be remotely supervised, each pupil/group should have an airtag tracker on them. The trip leader must be familiar with how the App works and is responsible for loading pupil identities and checking that the devices are in working order prior to use.
- 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, which includes relevant medical information.
- During longer residential visits it is essential that staff work closely with external staff (when appropriate) to maintain supervision of the children.
- 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, and a record of this made and kept, so that a minimum of 2 adults are on duty at all times.

10.Risk assessments

'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).

In considering risk, there are 3 levels of which visit leaders should be mindful:

- 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.
- 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.
- Ongoing Risk: the monitoring of risks throughout the actual visit as circumstances change.

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.

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.

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, 2024 and the Prevent Duty, updated 2023. 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.

The health and safety of those involved in a visit overrides any disability act (see also the School's Health and Safety Policy).

Further detail on risk assessment may be found in the School's Risk Assessment Policy. On the day of the visit, staff should:

- Refer to the Educational Visits Checklists (see Appendices)
- Collect first aid kit(s);
- Take asthma pumps and Epi-pens as necessary, signed out from reception; Where pupils carry Epi-pen bags, the group leader must check that these are with them when getting on and off transport and whenever moving location.
- Brief supervising adults, including parents;

- Ensure mobile phones are working, that the office has the number(s) and that they are switched on during the whole visit;
- Count the number of pupils regularly and always when changing locations.
- 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, signed by the Trip Leader, EVC and Headmaster, and a copy of all trip documentation must be given to the EVC **before** the visit is undertaken.

Group Leaders should:

- Identify the potential hazards of the place being visited;
- List the groups of pupils that are at risk from potential hazards;
- Identify how any risks or hazards are going to be managed;
- Monitor supervision throughout the trip;
- Ensure that the trip is covered by the school's insurance policy (refer to the Bursar).

11. Trips abroad

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. All providers must complete, sign and return the School's Provider Assessment form, a copy of which can be found in the Appendix.

Before the trip

Group Leaders should communicate with parents. Group Leaders will refer to <https://www.gov.uk/foreign-travel-advice> prior to booking the trip. 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.

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.

A school event does not require the full consent form; however, consent must still be obtained from participating children's parent/guardian. This will normally be done via an office 365 form linked in correspondence from the school or using the form facility provided by SchoolPost.

12.Contingency planning / Plan B

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.

13.Preparation of pupils

- 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:
- Timings;
- The member of staff who is responsible for them;
- Expectations for behaviour (see the School's Behaviour and Discipline Policy for further details);
- Potential risks (see paragraph 10);
- Safety during the trip;
- Pupils with special or medical needs should be given extra instruction/supervision where applicable.

14.During the trip

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:

- Ensuring that all relevant pupil details are being carried;
- Carrying out a head count at opportune moments throughout the trip, but always upon arrival and departure;
- Checking that pupils are wearing seat belts/safety belts/life jackets;
- Checking fire exits and escape routes and ensuring fire exits are clear;
- Ensuring accommodation is of a suitable standard and having tested a fire drill;
- Setting times/rules for pupils in their rooms;
- Enforcing standards of behaviour;
- Carrying the correct documentation: this may entail checking that pupils have passports and that passports have 6 months validity after the date of return;
- Keeping an account of expenditure and receipts;

- Be able to communicate with parents during the trip in an emergency.
- Recording any incidents that occur during the visit, ensuring that parents are advised of any incidents or accidents requiring the administration of first aid or homely medicines or that required monitoring during the trip.

15.Accidents and emergencies

- 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.
- 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.
- 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.
- 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.
- The EVC evaluates trips and visits after completion and keeps records of incidents, accidents and near misses.

16.Expenditure

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.Booking procedure

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, consent in principle should not be considered to be permission and it is essential that the correct booking procedures are followed:

- 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 the Registrar.
- The proposed trip or event will be considered by the Director of Curriculum, the EVC and Assistant Head **before** it is put to the Senior Management Team for approval.
- 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.

- Dates will be then put into the calendar by the Assistant Head.

The Group Leader must then work through the relevant checklist, in order and in a timely manner, which gives clear guidance on the timeframes and procedures to be followed. These include:

- Liaise with Finance team over costing and billing arrangements, agree a financial contract if deemed necessary, and sign off on the check list to show this has happened.
- Inform parents and obtain consent. Letters should be checked by the Head (through his Executive Assistant) who will obtain the Headmaster's approval.
- Liaise with Reception and administration staff about booking transport, organising letters, collation of documentation, insurance cover and validity of volunteer DBS checks etc.
- Carry out pre-visit if possible and complete relevant checklists.
- Liaise with School Nurses - A trips medical requests form **must** be submitted to tripsmedical@heathmount.org at least two weeks before. One first aider must be included on the staffing team and a medical lead must be designated by the Trip Leader.
- Organise and collate group lists, medical information, itinerary etc.
- Meet in person with EVC at least two weeks before proposed trip/visit to go through, discuss, and sign off the completed checklist and risk assessments.
- Brief both the staff team and pupils on the trip/event.
- 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.
- 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 SCHOOL HUB FOR UP-TO-DATE RISK ASSESSMENT FORMS AND CHECKLISTS FOR: REQUEST FORM PART 1, SCHOOL EVENTS, DAY AND RESIDENTIAL TRIPS. STAFF SHOULD SAVE THESE INTO THEIR OWN WORKING FOLDER BEFORE ADAPTING/COMPLETING.

18. Monitoring and Review

- The School will monitor this policy on an ongoing basis, taking into account the recommended guidelines from the relevant authorities and organisations. The School will regularly review the effectiveness of this policy and how it can be improved.
- The Governors will review this policy annually.

Governors' committee reviewing	Education Committee
Effective From	January 2025
Period of review	Bi-annually
Next review date	September 2026
Person responsible for implementation and monitoring	EVC
Related policies	<ul style="list-style-type: none"> • Child Protection and Safeguarding Policy and Procedures • Health and Safety Policy • Curriculum Policy • Risk Assessment Policy • First aid Policy • Minibus Policy • Behaviour and Discipline Policy

Appendix A

 Heath Mount School	A Checklist for planning a School Event 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 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 Event being planned: _____

Date of event: _____

Name of staff leader: _____

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

Signed by Trip Leader:

Date:

The staff leader is responsible for making firm bookings and ensuring costings fall within their budget.

Confirm the date for entry to the calendar to Assistant Head ***1-2 terms in advance***

Signed by Assistant Head:

Date:

Initial planning and discussion meeting with the EVC ***Ideally 1 term in advance, but at least 4 weeks in advance.***

The staff leader should bring their planning outline for discussion and approval, following the 'STAGED' approach:

STAFF -Numbers, competence and experience of all adults on the visit.

TRANSPORT -The mode of transport, assessing providers, consent for private cars, etc.

ACTIVITIES -Intended learning outcomes, suitability, range, prior training needed, special equipment needed.

GROUP -Age, prior experience, abilities, behaviour, maturity, medical/dietary needs.

ENVIRONMENT -Urban, rural, remote, distance from base, transport, season, time of day.

DISTANCE -Is the activity: onsite/within the Local Learning Area/further afield/remote/overseas?

Discussion to include: The need for an inspection visit/full risk assessment; Activities; Staffing -experience, impact on school, first aider; Emergency procedures and Critical Incident Plan; Group management issues; Contingency plans. **All of these elements feed into, and should be included in, the risk assessment. Often, but not always, the notes from this meeting will be sufficient evidence of the Risk Assessment process for a simple event.**

Signed by EVC:

Date:

Costings Review/Approval with the Financial Controller ***Ideally 1-2 terms in advance, but at least 2 months in advance.***

All costings need to be shared with and approved by the Financial Controller ahead of any communications being sent to parents.

If applicable a discussion also needs to take place re billing schedules and cashflow timings of funds in from parents versus payments out to suppliers.

All supplier/provider cancellation T&Cs need to be shared with the Financial Controller and must be considered when calculating costings.

Signed by Financial Controller:

Date:

Information to parents and gain written consent ***2-4 weeks in advance***

Letter to be sent out to parents giving an outline of the proposed trip, its aims and outcomes, transport details, cost implications and what kit/food etc is required. Written consent must be obtained for any trip/event that takes a child out of school unless it is part of the weekly timetabled activities (e.g. sports fixtures). This consent can be via a tab on SchoolPost. A copy of the consent must be kept and added to the trip folder.

Signed by Trip Leader:

Date:

Collection of specific information ***2-4 weeks in advance***

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. Ensure medical lead is qualified to administer medications and understands their role and responsibilities.

Name of designated first aider(s):

Signed by School Nurse:

Date:

Inform colleagues of pupils involved in any term time trip ***2- 4 weeks in advance***

Send out an email and ensure that TWA document is updated. The trip leader is responsible for ensuring that all relevant information is put on to the 'Week Ahead' document.

Signed by Trip Leader:

Date:

Check in with DSL

2 weeks in advance

- Ensure that Trip Leader is fully aware of any specific concerns or other pertinent pastoral information which might have an impact on how these children are managed and kept safe during the trip.

- Ensure that Trip Leader is aware of any children whose parents have not consented to their photographs being used in school marketing, newsletters or social media.

Signed by DSL:

Date:

Pupil Briefing

1-2 weeks in advance

The pupils should:

- know the aims of the trip, timings/necessary kit etc and know a rough itinerary including all travel details and 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 and that 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

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 and given to the finance department.
- Petty cash, credit card, or currency card requests must be made at least two weeks in advance.

Final sign off for the trip

1-2 weeks in advance

Once all paperwork is complete the trip leader, EVC and Headmaster should sign below.

Signed by Trip Leader:

Date:

Signed by EVC:

Date:

Signed by Headmaster:

Date:

Appendix B – Sports Event Form Check List

Sports Event Form Check List

Responsibilities for taking sport

Type of Event	Venue	Type of Risk Assessment Required	Event approval required	EVC paperwork required	Parental Acknowledgement required
Match Day fixture (Wednesday or Thursday)	HM	General RA covers this. Standard bus journey RA covers away fixture	No	No	No
Matches or Gala's away from school which eat into non-Games time	HM	General RA covers this	Yes – from DN and RA. This needs to be checked against the calendar	No	No
Matches or Gala's away from school which eat into non-Games time (max half day)	Other Schools	Away Schools RA covers this venue. There should be the standard RA to cover the bus journey	Yes – from DN and RA. This needs to be checked against the calendar	No	No
Matches or Gala's away from a regular school setting	Non School Setting (such as Hitchen Hockey Club)	Generic off-site sports risk assessment, or a specific Risk assessment for that venue, applies. The venue must be known and a copy of their risk assessment held. If the tournament is held by another school the trip leader must have a copy of the other school's RA	Yes – from DN and RA. This needs to be checked against the calendar	No	No

Tournaments/events lasting a whole day	Other School Setting	Away Schools RA covers this venue. The standard RA to cover the bus journey is acceptable but staff attending must be familiar with it.	Yes – from DN and RA. This needs to be checked against the calendar	A sports events form should be submitted to the EVC at least 1 week prior to the tournament by the trip leader	Yes
Fixtures requiring a residential stay	Hotel/Airbnb	Hotel/Airbnb requires risk assessment. Tournament venue follows guidelines above	Yes – from DN and RA initially to see if it will fit in the calendar.	Full trips events form required	Yes
Weekend fixture when parents take directly to the event and pick up after	Other school setting	Away Schools RA covers this venue. HM staff to ask for a copy.	Yes – from DN and RA. This needs to be checked against the calendar	No	No
Saturday Fixture when school is providing transport	Other school setting Generic Mini-Bus RA	Away Schools RA covers this venue. HM staff to ask for a copy.	Yes – from DN and RA. This needs to be checked against the calendar	No	Yes

Appendix C – Sports Event Form

Sports Events Form

Trip Leader Check List

Mini-Bus Booked	Reg
Distance to Venue (a stop must be factored in every 2 hours) If a stop is required where is this? Has this been included in the RA	Distance: Stopping Point (if required):
Children's medical conditions (to include sever allergies and serious illnesses or reactions) should be covered in the transportation Risk Assessment. These should be added to the genetic transportation risk assessment and made specific for that individual.	Pupil Names:
Second Member of Staff (if journey is more than 45 mins away)	Name
Venue Risk Assessment seen by all members of staff attending	Yes/No
Relevant Transport Risk Assessment read and understood by all attending staff	Signatures
Packed Lunches required/ dietary requirements	Names and Requirements
Journey Time: Start Time : Finish Time: Return time:	

Signed:

Date:

Appendix D

Do you need to meet with the EVC, or complete a risk assessment, before taking a group of Heath Mount pupils off the school grounds?

1	Are you taking a group of children out of the school grounds?	Yes	Got to Row 2.
		No	Any activity, fixture etc. taking place within the school grounds needs no meeting with the EVC, but the organizing member of staff must ensure that they are following relevant protocols, have permission off SMT, have completed relevant risk assessment for the activity and had this signed off by the Deputy Head. If bringing in adults from outside our school staff, ensure that visiting speaker risk assessments are done and signed off.
2.	Are you taking the group out on a regular Wednesday/Thursday sports fixture to another school?	Yes	No meeting with the EVC is needed or further paperwork as your group will fall under the umbrella of the other school's policies and risk management, but you as the member of staff responsible for the group must check, be familiar with, and follow the standing risk assessments (coach, minibus, sports fixtures etc.)
		No	Go to Row 3.
3.	Are you taking the group to a site/venue which is not a school, but is regularly used by Heath Mount?	Yes	Check in with the EVC to ensure that relevant risk assessments have been completed and are on file. There should be no need for additional paperwork, but the staff leader must be familiar with, and follow, the standing risk assessments in place. Extra care will need to be taken regarding safeguarding and medical issues.
		No	Go to Row 4.
4.	<p>For any situation other than those outlined above, the member of staff leading the trip/fixture/excursion will need to begin the planning process with a meeting/discussion with the EVC.</p> <p>This should take place as far in advance as possible, and no bookings or firm plans should be made until this initial discussion has taken place. Discussion will be based upon the STAGED approach (Staffing, Transport, Activities being planned, Group, Environment and Distance. Have your notes on these with you.</p> <p>The level of Risk Assessment and documentation required will be made clear by the EVC at this point, dependent on the outcomes of the initial discussion and in line with the school's Educational Visits Policy and trip checklists.</p>		

Appendix E

 Heath Mount School	A Checklist for planning and leading a residential trip This check list acts as part of the Risk Assessment
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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.

Destination/name of trip being planned: _____

Date of trip: _____

Name of trip leader: _____

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 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.

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.

Initial planning and discussion meeting with the EVC

Ideally 1 year in advance, but this must take place before any final bookings are made.

The trip leader should bring their planning outline for discussion and approval, following the 'STAGED' approach:

STAFF -Numbers, competence and experience of all adults on the visit.

TRANSPORT -The mode of transport, assessing providers, consent for private cars, etc.

ACTIVITIES -Intended learning outcomes, suitability, range, prior training needed, special equipment needed.

GROUP -Age, prior experience, abilities, behaviour, maturity, medical/dietary needs.

ENVIRONMENT -Urban, rural, remote, distance from base, transport, season, time of day.

DISTANCE -Is the activity: onsite/within the Local Learning Area/further afield/remote/overseas?

Discussion to include: The need for an inspection visit/risk assessment; Activities and licensing/insurance checks; Staffing -experience, impact on school, first aider; Emergency procedures and Critical Incident Plan; Group management issues; Contingency plans; financial contract and information sharing with parents; GDPR reminders.

All of these elements feed into, and should be included in, the staff information booklet.

Signed by EVC:

Date:

Costings Review/Approval with the Financial Controller

Ideally 1 year in advance, but this must take place before any final bookings are made.

All costings need to be shared with and approved by the Financial Controller ahead of any communications being sent to parents.

If applicable a discussion also needs to take place re billing schedules and cashflow timings of funds in from parents versus payments out to suppliers.

All supplier/provider cancellation T&Cs need to be shared with the Financial Controller and must be considered when calculating costings.

Signed by Financial Controller:	Date:
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Make firm bookings ***Ideally 1 year in advance but at least 1 full term in advance.***

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

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

Signed by Assistant Head:	Date:
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Initial letter and sign up

2-3 terms in advance

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 in line with the financial contract for the trip.
- 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 GHICs if required
- Set deadlines for the return of this information

Parent and Pupil Briefing

In the term of the trip departing

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, GHIC 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.

Collate the specific pupil information that has been collected
6 weeks in advance

- 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. Good practice is for the trip leader to cross check and summarise this information, rather than just printing of the ISAMS report.
- 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.

Designated Medical Lead: _____

- If traveling abroad then please make 2 photocopies of Passports and GHICs. 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 the ISAMS co-ordinator 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.

Inform colleagues of pupils involved in any term time trip ***4 weeks in advance***

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 must ensure that TWA document is correctly updated with relevant information

Agree a designated SMT school based contact ***4 weeks in advance***

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

Check in with DSL

4 weeks in advance

- Ensure that Trip Leader is fully aware of any specific concerns or other pertinent pastoral information which might have an impact on how these children are managed and kept safe during the trip.
- Ensure that Trip Leader is aware of any children whose parents have not consented to their photographs being used in school marketing, newsletters or social media.

Carry out a Risk Assessment

At least 4 weeks in advance

The risk assessment templates can be found on the Staff Hub under the 'Planning a School Trip' tab. The EVC will be available to help in the process which should be discussed as part of the initial meeting. 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. **You must get the provider to complete the 'Provider Assessment Form'** unless they have a Quality Badge from LOTC -check with EVC.
- **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 EVC who will either suggest amendments or additions or simply sign it for the file. This should be completed at least 4 weeks in advance.

Divide your pupils into "counting groups"

3 weeks in advance

It is recognised good practice to divide large groups into 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

2 weeks in advance

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.

Allocate rooms

2 weeks in advance

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. Check guidance on Peer on Peer abuse from Risk Assessment notes.
- 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

Brief the staff on the trip

1-2 weeks in advance

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 and the role of the Medical Lead
- 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, Medical Lead responsible for collecting all medicines/First Aid and a Banker.
- Pupils of specific concern, those not to be included in social media post etc.

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

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 completely alcohol free at any one time. A record of who is on duty should be created and kept, for the avoidance of any doubt.

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

Arrange for the collation of documentation

1-2 weeks in advance

Organise with the school office, and inform parents, when all documentation should be delivered in to school. The Registrar can help 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
- GHIC 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 Medical Lead on the trip)
- Pocket Money

Manage the finances in conjunction with the Bursary

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 and given to the finance department.
- Petty cash, credit card, or currency card requests must be made at least two weeks in advance.
- Book out a school mobile from the Registrar and add the number to trip documentation.

Ongoing risk assessment during the visit

on-going

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 host of other unforeseen circumstances.

Evaluation of the visit

Within 2 weeks of the trip returning (a copy the EVC)


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

A copy of this evaluation (hand written notes are fine) must be added to the trip folder.

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

Appendix F

 Heath Mount School	A Checklist for planning a day trip 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 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***

Signed by Trip Leader:	Date:
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The Trip Leader is responsible for making firm bookings and ensuring costings fall within their budget.

Confirm the date for entry to the calendar to the Assistant Head ***1-2 terms in advance***

Signed by Assistant Head:	Date:
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Initial planning and discussion meeting with the EVC ***Ideally 1-2 terms in advance, but at least 2 months in advance.***

The trip leader should bring their planning outline for discussion and approval, following the 'STAGED' approach:

STAFF -Numbers, competence and experience of all adults on the visit.

TRANSPORT -The mode of transport, assessing providers, consent for private cars, etc.

ACTIVITIES -Intended learning outcomes, suitability, range, prior training needed, special equipment needed.

GROUP -Age, prior experience, abilities, behaviour, maturity, medical/dietary needs.

ENVIRONMENT -Urban, rural, remote, distance from base, transport, season, time of day.

DISTANCE -Is the activity: onsite/within the Local Learning Area/further afield/remote/overseas?

Discussion to include: The need for an inspection visit/risk assessment; Activities; Staffing - experience, impact on school, first aider; Emergency procedures and Critical Incident Plan; Group management issues; Contingency plans.

All of these elements feed into, and should be included in, the staff information booklet.

Signed by EVC:	Date:
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Costings Review/Approval with the Financial Controller ***Ideally 1-2 terms in advance, but at least 2 months in advance.***

All costings need to be shared with and approved by the Financial Controller ahead of any communications being sent to parents.

If applicable a discussion also needs to take place re billing schedules and cashflow timings of funds in from parents versus payments out to suppliers.

All supplier/provider cancellation T&Cs need to be shared with the Financial Controller and must be considered when calculating costings.

Signed by Financial Controller:	Date:
---------------------------------	-------

Information to parents and gain written consent

2-4 weeks in advance

Letter to be sent out to parents giving an outline of the proposed trip, its aims and outcomes, transport details, cost implications and what kit/food etc is required. Written consent must be obtained for any trip/event that takes a child out of school unless it is part of the weekly timetabled activities (e.g. sports fixtures). This consent can be via a tab on SchoolPost. A copy of the consent must be kept and added to the trip folder.

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. Ensure medical lead is qualified to administer medications and understands their role and responsibilities.

Name of designated first aider(s):

Name of designated Medical Lead:

Signed by School Nurse:	Date:
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Inform colleagues of pupils involved in any term time trip ***4 weeks in advance***

Send out an email and ensure that TWA document is updated. 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:
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Carry out a Risk Assessment

At least 4 weeks in advance

The risk assessment templates can be found on the Staff Hub under the 'Planning a School Trip' tab. The EVC will be available to help in the process which should be discussed as part of the initial meeting. 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 venue's 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.

Check in with DSL

3 weeks in advance

- Ensure that Trip Leader is fully aware of any specific concerns or other pertinent pastoral information which might have an impact on how these children are managed and kept safe during the trip.
- Ensure that Trip Leader is aware of any children whose parents have not consented to their photographs being used in school marketing, newsletters or social media.

Divide your pupils into "counting groups"

1-2 weeks in advance

It is recognised good practice to divide large groups into 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

1-2 weeks in advance

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 Medical Lead and first aider (who should liaise with school nurse team regarding first aid kits, inhalers, epipens, specific medication which may need to be administered etc)
- Pupils of specific concern, those not to be included in social media post etc.

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

Pupil Briefing

1-2 weeks in advance

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.

Manage the finances in conjunction with the Bursary

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 and given to the finance department.
- Petty cash, credit card, or currency card requests must be made at least two weeks in advance.

Ongoing risk assessment during the visit

On-going

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

Within 2 weeks of the trip returning (a copy to the EVC)

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

A copy of this evaluation (hand written notes are fine) must be added to the trip folder.

Final sign off for the trip

1-2 weeks in advance

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 DSL:

Date:



Appendix G

MEDICAL INFORMATION REQUEST

Form to be used for all trips/outings where medical information or medication is required.

This should be completed by the Trip Leader running the trip and is to be submitted **at least 2 weeks before the trip** (longer if residential trip) to allow for collating of medical information and organising stock of any medications or 1st Aid Bags that may be required. **If there are any significant changes after the form is submitted, please update the information and let the School Nurses know with as much notice as possible.**

Please email to tripsmedical@heathmount.org which will copy Reception to collate the group details onto iSams, as well as the School Nurses and Matron.

Trip Leader:					
<i>I understand that information supplied is confidential medical information and agree to keep all records stored safely throughout the trip and will be given back to the School Nurses on return.</i>					
NAME OF ALLOCATED TRAINED FIRST AIDER AND/OR MEDICATION GIVER:					
Staff Accompanying Trip Leader:					
Date of Request:			Trip Details (ie. Art trip, Sports Trip):		
Requested by:			Date of Trip:		
Location:			Mode of transport:		
			Time Leaving:		
Name of Pupils going: (Or if whole year group, please state)					
PLACE MARK IF YOU REQUIRE ANY OF THE FOLLOWING:					
1 st Aid Bag		Sick Bucket(s)	How many	Sanitary Products	
Homely Remedies Medications (see below)		Sick Bags		Other:	

Homely Remedies Medication

The School Medical Team will assess what medication you may need for your trip and supply accordingly. If you feel you need something specific for your trip e.g. paracetamol/antihistamine, please state it below:

If you take any medications on your trip, you will need to have a current competency for Administration of Medications and be aware of the legal, ethical and medical requirements of administering medications to pupils.

*Please be aware, that it is a legal requirement that any medication administered to pupils **MUST** be documented. Any drug errors or returned stock of medication that does not match those supplied and documented will be reported to the Headmaster.



Heath Mount School

Day trip Risk Assessment (Appendix F2)

Destination:	Visit Leader:	Contact numbers:
	Staff team:	School Based Emergency Contact:
Activities planned: Tour and Art Activity	LoTC Badge/AALA or equivalent:	Provider's liability insurance:
Group:		
Details of nearest A&E or minor injuries unit:		
Transport:	Contact details:	Booking reference:
Risk assessment undertaken by:	Date:	Signed by Visit Leader:
		EVC:

The visit leader should be familiar with, and have checked through, the relevant risk assessments provided by all activity providers, residential accommodations etc. Key information should be recorded in this general risk assessment along with an overview of the trip and the means by which identified risks will be managed.

Risk/ Hazard	How might this cause harm?	Control measures to be put in place:	Actioned by:
Any failure in our child protection and safeguarding.	Various, from a child in our care being frightened right through to severe physical and/or emotional harm.	<p>All staff and any accompanying adults are DBS checked and vetted by the school. All staff have undergone safeguarding training and are familiar with the school's Child Protection and Safeguarding policy and the KCSIE guidance issued by the DfE.</p> <p>The trip leader has done their due diligence as part of this risk assessment in checking that <i>(insert provider's name)</i> is compliant with all relevant safeguarding procedures and that they have carried out appropriate vetting of their staff.</p> <p>The site is secure, this has been checked by the trip leader in their pre-trip site visit. Heath Mount children will be always accompanied by a member of HM staff who will retain responsibility for their pastoral wellbeing. <i>Clear risk assessment has been conducted for any times when children will be supervised remotely, and children are clearly briefed on these occasions.</i> Children will be always in groups -never alone- and have been briefed on what to do if approached by unknown persons or if they receive unwarranted attention. As part of the trip briefing, children are reminded of procedures and what to do if they feel uncomfortable in any situation or need help. Constant, proactive dynamic risk assessment will be carried out by the whole staff team throughout the trip.</p>	Trip Leader and all staff.

Child on child abuse	Various, from a child in our care being frightened right through to severe physical or emotional harm.	<p>Staff must all be aware of the risk of child-on-child abuse and take the approach that it could well happen on any school trip.</p> <p>Careful consideration has been given to how children have been organised into activity groups, in conjunction with the HoY and DSL. Procedures are in place to cover use of changing rooms, toilet breaks etc that ensure a member of staff is supervising closely enough to hear and keep an eye on what is going on and to be sensitive to any nuances of inappropriate behaviour. This is particularly important where facilities may be used by children from another school or members of the public, when supervision must be tightened. As part of the trip briefing, children are reminded of procedures and what to do if they feel uncomfortable in any situation or need help. Constant, proactive dynamic risk assessment and supervision will be carried out by the whole staff team for the duration of the trip. Any concerns must be raised with the trip leader immediately.</p>	Trip Leader and all staff.



Heath Mount School

Residential trip Risk Assessment (Appendix E2)

Destination:	Visit Leader:	Contact numbers:
	Staff team:	School Based Emergency Contact:
Activities planned:	LoTC Badge/AALA or equivalent:	Provider's liability insurance:
Group:		
Details of nearest A&E or minor injuries unit:		
Transport:	Contact details:	Booking reference:
Risk assessment undertaken by:	Date:	Signed by Visit Leader:
		EVC:

The visit leader should be familiar with, and have checked through, the relevant risk assessments provided by all activity providers, residential accommodations etc. Key information should be recorded in this general risk assessment along with an overview of the trip and the means by which identified risks will be managed.

Risk/ Hazard	How might this cause harm?	Control measures to be put in place:	Actioned by:
Any failure in our child protection and safeguarding.	Various, from a child in our care being frightened right through to severe physical and/or emotional harm.	<p>All staff and any accompanying adults are DBS checked and vetted by the school. All staff have undergone safeguarding training and are familiar with the school's Child Protection and Safeguarding policy and the KCSIE guidance issued by the DfE.</p> <p>The trip leader has done their due diligence as part of this risk assessment in checking that (<i>insert provider's name</i>) is compliant with all relevant safeguarding procedures and that they have carried out appropriate vetting of their staff. The site and accommodation are secure, this has been checked by the trip leader in their pre-trip site visit or remote inspection. Heath Mount children should be accompanied by a member of HM staff at all times who will retain responsibility for their pastoral wellbeing. Clear risk assessment has been conducted for any times when children will be supervised remotely, and children are clearly briefed on these occasions. Children will be always in groups -never alone- and have been briefed on what to do if approached by unknown persons or if they receive unwarranted attention. HM staff will ensure rooms/accommodation are secure and a night time lock down procedure is in place. As part of the trip briefing, children are reminded of procedures and what to do if they feel uncomfortable in any situation or need help. Children will always know who duty staff are and how to find them. Constant, proactive dynamic risk assessment will be carried out by the whole staff team throughout the trip.</p>	Trip Leader and all staff.

<p>Child on child abuse</p>	<p>Various, from a child in our care being frightened right through to severe physical or emotional harm.</p>	<p>Staff must all be aware of the risk of child on child abuse and take the approach that it could well happen on any school trip.</p> <p>Wherever possible, children have been placed in rooms of at least three children. Where children are in pairs, very careful consideration has been given to the rooming allocation in conjunction with the HoY and DSL. Children have had the opportunity to specify who they would be comfortable sharing a room with and anyone who they would not like to share with. Children have not been placed in groups of different ages or sexes (<i>and younger children ought to be in bigger groups</i>). It is often impractical for staff to be supervising all rooms at all times but, wherever possible, there will be a staff presence in or near rooms when children are changing etc. Children should not be 'hanging out' in their rooms behind closed doors. Staff will dip in and out of rooms, in order to keep an eye on what is going on and to be sensitive to any nuances of inappropriate behaviour. As part of the trip briefing, children are reminded of procedures and what to do if they feel uncomfortable in any situation or need help. Constant, proactive dynamic risk assessment and supervision will be carried out by the whole staff team. Any concerns must be raised with the trip leader immediately.</p>	<p>Trip Leader and all staff.</p>
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Appendix H

School Event Risk Assessment for non-complex events using the STAGED approach

Staff team:	Transport:	Activities:
Group:	Experience:	Distance: