



Heath Mount School

Educational Visits

Introduction

At Heath Mount 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, as 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/religious awareness and some are designed to enhance physical skills, self-reliance and team work.

1 General Information

1.1 Trips and visits involving Heath Mount

The school regularly take pupils to museums, galleries, theatres, workshops, lectures, temples, churches, mosques, outward bound centres and the like. In the Pre-Prep school, trips are arranged on different days to a variety of venues directly related to the curriculum. In the Prep school there is a Curriculum Day each term, when all year groups have a day's experience in an area related to curriculum studies.

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

1.2 Consent

When a trip extends beyond the normal school day and involves an overnight stay the school requires parents' or guardians' specific, individual written consent.

Heath Mount School is unable to take pupils without a completed and signed consent form, which includes contact details in the event of an emergency. A model consent form is included in section 2.8 of this policy and permission for emergency treatment to be administered if appropriate is included on the form.

1.3 Safety

At Heath Mount School 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.

2 Guidance for staff involved with school visits

Heath Mount 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.



Heath Mount School

2.1 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. Jonathan Spowart is the Heath Mount 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.

2.2 Role 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. Group Leaders should complete the relevant Educational Visits Checklist (see appendices) and return to the EVC prior to a visit taking place.

Further guidance on the steps that they should follow is set out in a model risk assessment form that is part of DCFS Guidance: *The Health & Safety of pupils on Educational Visits. A Good Practice Guide* (www.teachernet.gov.uk).

He/she must present the trip details contained in the Checklist and the risk assessment to the EVC at least two weeks in advance of the trip and must also give copies to other staff attending and to Reception for filing (Both Pre-Prep and Prep school trip).

2.3 First Aid

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.

First aid kits are available from the SAN. If the visit involves the party splitting up, a kit should be taken for each group.

Group Leaders are responsible for informing Matron and the Catering Department about the trip and for assuring 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 Matron.

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 *Medical Policy*.

2.4 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.



Heath Mount School

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 LA's policy may drive the minibus. There are additional requirements where the minibus is borrowed / hired. Before using the vehicle, the driver must complete a checklist and report any defects to the head teacher or SMT. Additional checks should be made for longer journeys and each half term by the member of SMT with responsibility for the minibus.

If any pupils are to travel by car, the driver must complete a form which must be obtained from the bursary. This is also relevant to sports fixtures, and applies to both staff and parents' cars. A new form must be completed every academic year. NOT SURE ABOUT THIS STATEMENT. I THOUGHT THAT WE WERE AUTOMATICALLY COVERED BY SCHOOL INSURANCE? DO WE HAVE THESE FORMS??

2.5 Staff Requirements

A working list of groups/Group Leaders and medications must be kept.

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.

For EYFS trips at least one person on the trip MUST have a paediatric first aid certificate.

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.

2.6 Staff/pupil ratios

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

Most of these ratios are in excess of the DCFS recommended guidelines.

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, SEN, 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.



Heath Mount School

Pupils must be supervised throughout all visits. However, there are circumstances when they 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:

- Prior experience of pupils;
- Age of pupils;
- Responsibility of pupils;
- Competence/ experience of staff;
- Environment/ venue.

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.

During longer residential visits it is essential that staff work closely with external staff (when appropriate) to maintain supervision of the children. 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 Smoking, Drugs and Alcohol and Staff Code of Conduct policies 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.

2.7 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 appendices), 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.



Heath Mount School

The publication *Group Safety at Water Margins* 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 DfES *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*, 2015 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.

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 Heath Mount 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;
- 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 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. All Group Leaders must complete a Checklists (see appendices) for every Educational Visit and a copy must be given to the EVC before the visit is undertaken.

Heath Mount School has a simplified system for judging whether an activity is too dangerous to attempt and this is explained clearly on the risk assessment form. Activities that have a score of 1-8 are deemed acceptable for all to attempt. Activities with a score of 8 may be attempted but all in supervisory roles must be aware of the risks. Activities with a score of 10+ may not be attempted.

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 schools insurance policy (refer to Bursar).



Heath Mount School

2.8 Before the trip

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, ETA, 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. The letter should also state the cost of the visit per child.

Typically the reply slip should read:

"I give permission for my child _____ to take part in and enclose my voluntary contribution of I have read and understand the information about the visit. I give permission for emergency medical treatment to be administered to my child if appropriate."

"I have read and understand the information in the letter, and give permission for my child to take part. I give permission for emergency medical treatment to be administered to my child if appropriate"

2.9 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 Heath Mount School's Educational Visits Risk Assessment process.

2.10 Preparation of pupils

Before the trip pupils should be reminded that they are representing Heath Mount 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 section 2.7);
- Safety during the trip;
- Pupils with special or medical needs should be given extra instruction/supervision where applicable.

2.11 During the trip



Heath Mount School

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;
- Ensuring accommodation is of a suitable standard;
- Setting times/rules for pupils in their rooms;
- Enforcing standards of behaviour;
- Carrying the correct documentation – this may entail checking that pupils have passports;
- Keeping an account of expenditure;
- Recording any incidents that occur during the visit.

2.12 Accidents and Emergencies

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 Critical Incident Plan would be deployed.

For visits that take place in school time, 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 contacts must also hold this information or be able to access it quickly.

2.13 Expenditure

The group leader is responsible for returning any unused monies to the Bursary and for providing a schedule of expenditure for the trip.

Trips abroad will follow DCSF Model Policy requirements.

3 Booking Procedure

The following people must be informed about proposed visits out of school *before* booking:

- The Headmaster;
- The Educational Visits Co-ordinator (EVC);
- The Bursar.



Heath Mount School

Procedures

1. Inform the Headmaster, check that proposed dates are convenient and put in the school diary.
2. Complete transport booking form at least 3 months in advance or as early as possible, and copy to EVC.
3. Complete LA approved form (residential trips and adventurous activities only)
4. Liaise with the Reception and Admin staff with regards to booking transport, cost, letter to parents and, if necessary, additional insurance
5. Inform parents using standard letter (available from Reception) or, where your own letter is used, email a copy to Reception.
6. Copy of Risk Assessment and letter to parents to EVC.
7. Carry out pre-visit if possible and complete the Educational Visits Checklist.
8. Keep record of contributions made by parents using class list on A4 envelope, ensuring money is checked and then send to Reception daily for safekeeping.
9. Use the Educational Visits Checklist as an aide memoir before and on the day of the visit.

If the Headmaster and EVC have not agreed to the visit, and the necessary forms are not completed, then **THE VISIT MUST NOT GO AHEAD.**



Heath Mount School

Management of Health & Safety at Work Regulations 1999

RISK ASSESSMENT for OFF-SITE ACTIVITY

VISIT:

DATE(S):

YEAR GROUP/CLASS:

RATIO (based on guidance):

TRIP LEADER (inc. contact details):

OTHER STAFF (inc. contact details):

PUPILS WITH KNOWN MEDICAL CONDITION:

Risk/ Hazard	Residual Risk High/Med/Low	Normal Control Measures	Control Measures in place Yes/No	Extra Measures Required	Extra Measures in place Yes/No
Medical Problem	Low	All relevant medical details taken and distributed to group leaders.	Yes		
Road Traffic Accident	Medium	Regular school coach company being used. If using school minibus, driver to have up-to-date Minibus Assessment. All pupils to wear seatbelts. Where possible no pupils seated at front of coach/minibus. Staff in attendance.	Yes		
Allergies	Medium	All relevant medical details taken and distributed to group leaders. Pupils at greater risk brought to the attention of all. Epi-pen carried for those who require it.	Yes		
Stranger Danger	Medium	Pupil:Staff ratio high. All staff to be assigned designated groups. Pupils to be registered by group leader after activity. Supervision by group leaders at all times.	Yes		
Negotiating Traffic	Medium	Where there is no available crossing staff to assess whether it is safe to cross. If any uncertainty of safety then crossing not to be attempted. Pupils made aware of traffic dangers in areas such as car parks.	Yes		
Animal Faeces	Medium	Pupils warned to be aware and,	Yes		



Heath Mount School

Risk/ Hazard	Residual Risk High/Med/Low	Normal Control Measures	Control Measures in place Yes/No	Extra Measures Required	Extra Measures in place Yes/No
		where possible, staff to pre-assess areas and be aware of contaminated areas.			
Adverse Weather	Low/Medium	Staff to check that pupils have sufficient warm clothing, to include coat and appropriate footwear, before departing from school.	Yes		
Additional Risk					



Heath Mount School

Appendix 1

A Checklist for planning and leading a residential trip

This check list acts as part of the Risk Assessment

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 (Jonny Spowart) 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

At least 1 year in advance of the trip

This will involve setting out the following before making any firm booking or commitment.

Name of the trip and the proposed dates	
The objectives and purpose of the trip	
The pupils involved	
The proposed date(s)	
The impact on other departments and sections	
A rough itinerary	
The costs; (Rough total, cost per pupil, bear in mind transport, accommodation, and any extra expenditure)	
Staffing requirements	
Transport requirements	

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.

Signed by HM:

Date:



Heath Mount School

Make firm bookings

At least 1 year in advance

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 Senior Deputy Head

1 year in advance

Signed by Senior Deputy Head:

Date:

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
- 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, Clarion Call etc)

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

Signed by EVC:

Date:

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. 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.



Heath Mount School

- 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 Clarioncall 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

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 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

Signed by Trip Leader:

Date:

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 Nurse so that she can check it against the whole school information that they hold. This should be added to the staff information booklet.
- If using residential accommodation, dietary/medical requirements should be sent to your contact.

Signed by 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 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

4 weeks in advance



Heath Mount School

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

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

Signed by SMT School Based Contact:

Date:

Carry out a Risk Assessment

4 weeks in advance

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 to all venues that will be used.
- 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 Deputy Head Pastoral 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"

3 weeks in advance

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



Heath Mount School

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 Clarioncall group

2 weeks in advance

- Set up a Clarioncall 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. Clarioncall should be used in the event of an altered return time. It is usual to text that the group have arrived safely.
- Louise Cook can provide training on the use of Clarioncall.

Signed by Trip Leader:

Date:

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
- 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

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
- 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:



Heath Mount School

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:

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. 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

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 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

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



Heath Mount School

- 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 JS)

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

Signed by Trip Leader:

Date:

Signed by EVC:

Date:

Signed by Headmaster:

Date:



Heath Mount School

Appendix 2 A Checklist for planning a day trip

 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 (Jonny Spowart) 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

At least 1-2 terms in advance of the trip

This will involve setting out the following before making any firm booking or commitment.

Name of the trip and the proposed dates	
The objectives and purpose of the trip	
The pupils involved	
The proposed date(s)	
The impact on other departments and sections	
A rough itinerary	
The costs; (Rough total, cost per pupil, billing)	
Staffing requirements	
Transport requirements	

SMT will consider clashes across Sections and Departments, avoiding congested times of the term and year, and meeting the school's aims for trips and visits in general

Signed by HM:	Date:
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Make firm bookings

1-2 terms in advance



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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 Senior Deputy Head 1-2 terms in advance

Signed by Senior Deputy Head:

Date:

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:

Collection of specific information

6-8 weeks in advance

Collate the relevant medical and dietary information and then pass it to the School Nurse so that she can check it against the whole school information that they hold. This should be added to the staff information booklet.

Signed by Matron:

Date:

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.

Signed by Trip Leader:

Date:

Carry out a Risk Assessment

4 weeks in advance

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.



Heath Mount School

- 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”

3 weeks in advance

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 Clarioncall group

2 weeks in advance

Clarioncall should be used in the event of an altered return time. Louise Cook can provide training on the use of Clarioncall.

Signed by Trip Leader:

Date:

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 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:



Heath Mount School

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

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 for presentation to the Bursary.
- Petty cash must be requested two weeks in advance.

Signed by Bursar:

Date:

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 JS)

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

Signed by Trip Leader:

Date:

Signed by EVC:

Date: