

The Rookeries Carleton J, I
& N School

The Rookeries Carleton J, I and N School

Educational Visits and School
Trips Policy and Procedures



Date Reviewed: October 2018

Next Review Date: October 2019

Signed Chair of Governors:

Date:

The Rookeries Carleton J, I and N School

Educational Visits and School Trips Policy and Procedures

Contents:

Statement of Intent

1. Definitions
2. Key roles and responsibilities
3. Training of staff
4. Risk assessment process
5. Parental consent
6. Supervision and staffing ratios
7. Insurance and licensing
8. If things go wrong
9. SEN and disabilities
10. Finance
11. Planning school trips
12. Procedures

Appendices

- 1) Arranging an Educational Visit - Flow Chart
- 2) Costing Form
- 3) Risk Assessment and Guidance Notes
- 4) Off Site Approval Form
- 5) Visit Planning Checklist
- 6) Standard Letter template
- 7) Class Spread sheet template

The Rookeries Carleton J, I and N School

Educational Visits and School Trips Policy and Procedures

Statement of intent

The Rookeries Carleton J, I & N School takes the health and wellbeing of our staff and pupils very seriously. We take reasonable steps as stated in the Health and Safety at Work Act 1974.

This policy has been designed in line with guidance produced by and from:

- DfE
- Health and Safety Executive (HSE)
- Wakefield Council Health & Safety Team
- EVOLVE (WMDC's online system that simplifies the process of planning, processing, monitoring, evaluating and reporting of educational and off-site visits)

This policy details our responsibilities for pupils whilst out on educational visits and school trips.

The Rookeries Carleton J, I and N School

Educational Visits and School Trips Policy and Procedures

1. Definitions

- 1.1. 'In loco parentis' means that the group leader of any school trip or educational visit has a duty of care over the pupils in place of a parent/carer.
- 1.2. 'School trip' means any educational visit, foreign exchange trip, away-day or residential holiday organised by school which takes pupils off-site.
- 1.3. 'Residential' means any school trip which includes an overnight stay.
- 1.4. 'Activities of an adventurous nature' include, but are not limited to:
 - Trekking
 - Caving
 - Water sports
 - Climbing

2. Key roles and responsibilities

- 2.1. Pontefract Academies Trust has delegated the responsibility of trips to the Governance Committee of The Rookeries Carleton J, I & N School.
- 2.2. The Governance committee has overall responsibility for the implementation of the Educational Visits and School Trips Policy of The Rookeries Carleton J, I & N School.
- 2.3. The Governance Committee has overall responsibility for ensuring that the Educational Visits and School Trips Policy, as written, does not discriminate on any grounds, including, but not limited to: ethnicity/national origin, culture, religion, gender, disability or sexual orientation.
- 2.4. The Governance Committee has responsibility for handling complaints regarding this policy as outlined in the school's Complaints Policy.
- 2.5. The Governance Committee has delegated approval of individual trips to the Head of School.
- 2.6. The Head of School is responsible for the management of the Educational Visits and School Trips Policy when trips are active or being organised.
- 2.7. Staff are responsible for following the Educational Visits and School Trips Policy, and for ensuring pupils do so too. They are also responsible for ensuring the policy is implemented fairly and consistently.
- 2.8. The designated leader in charge of the trip is 'in loco parentis' and has a duty of care to all members of the party.
- 2.9. Pupils are responsible for following instructions from teachers while on educational visits and school trips.
- 2.10. Pupils are responsible for behaving in a manner which matches the ethos of the school and for following the behaviour rules set out in the school's Behaviour Policy as they relate to the Educational Visits and School Trips Policy.

The Rookeries Carleton J, I and N School

Educational Visits and School Trips Policy and Procedures

3. Training of staff

- 3.1. This policy is included in the 'New Staff' induction pack.
- 3.2. Teachers and support staff will receive regular and ongoing training as part of their continued professional development.
- 3.3. Staff who are new to organising trips must meet the EVC for training before organising a trip.

4. Risk assessment process

- 4.1. Our risk assessment process is designed to manage real risks when planning trips, while ensuring that learning opportunities are experienced to the full.
- 4.2. Risk assessments are available from the EVOLVE website.
- 4.3. Staff who run trips have to receive log in details for EVOLVE from the EVC before submitting any risk assessments.
- 4.4. The risk assessments have to be submitted 2 weeks before for non-residential trips and 6 weeks before for residential trips.
- 4.5. Teachers check the risk assessments for accuracy and suitability before submitting them to the Head of School for full approval.
- 4.6. Guidance on how to complete risk assessments and a copy of a risk assessment are included in the appendices.

5. Parental consent

- 5.1. Parental consent is required for off-site activities.
- 5.2. Written consent is required for:
 - Activities of an adventurous nature.
 - Residential trips.
 - Foreign trips.
 - Trips outside of school hours.
 - Day trips requiring transport.
- 5.3. Parents / carers are asked to complete a 'one-off' consent form on induction to school, which gives consent for their child to be involved in any visits within walking distance of the locality.
- 5.4. Parents will be informed of each activity by letter and will have the opportunity to withdraw their child from taking part. Excluding visits referred to in 5.3, children will not be allowed to participate in a visit without a signed permission slip.

6. Supervision & Staffing Ratios

- 6.1. Effective supervision means active supervision. Exercising active supervision means being in a position of awareness of what is taking place in a given situation and being able to act effectively should the need arise. It does not always mean direct visual contact but it does mean the ability to anticipate potential problems and to take appropriate preventative action. Effective supervision depends on the application of sound judgement made by competent leaders.

The Rookeries Carleton J, I and N School

Educational Visits and School Trips Policy and Procedures

- 6.2. Supervision can be close or remote but must always be in place and active.
- 6.3. **Close supervision** is when pupils are within sight and/or contact of the supervisor.
- 6.4. **Remote supervision** occurs when, as part of planned activities, a group works away from the supervisors but is subject to stated controls (e.g. during souvenir shopping in a town centre) The supervisor is present though not necessarily near or in sight, but his or her whereabouts are known and there is a planned means of contacting them.
- 6.5. **Down-time or recreational time**, for example during the evenings, may involve close or remote supervision, but should not be unsupervised - the supervisors continue to be in charge and owe a duty of care to pupils.
- 6.6. **Factors influencing the nature of supervision**
The nature of supervision, the size of party and the teacher and adult/pupil ratios will be dictated by the age and experience of pupils, the competence of staff, the nature of the activities, and the venue. It is important to ensure that there are sufficient competent staff to deal with an incident. In an emergency, safe and efficient action may be necessary with one or more pupils whilst adequate supervision is maintained for the rest of the group.
- 6.7. **Leader competence** derives from:
- experience of the environment to be visited and activities involved;
 - leading similar educational visits;
 - knowledge of the pupils involved;
 - appropriate training in activities and environments;
 - leadership skills and other personal qualities.
- 6.8. **Establishing Leader competence**
Head of School and EVCs need to be satisfied that the visit leader and other teachers supervising pupils are competent to carry out their roles. Head of School also need to be satisfied that any other adults accompanying the visit are suitable for their role in the visit. Advice is available from the Outdoor Education Adviser where required.
- Specific competences are required for leaders of adventure activities and activities in outdoor environments including field studies and activities in or by water. Schools must refer to chapter 11, Types of Visit, if such activities are proposed.
- 6.9. **Supervision ratios**
It is important to have a high enough ratio of competent adult supervisors to pupils for all visits. Suitable ratios are a matter of judgment for the Head of School and EVC after consultation with the visit leader and as part of the risk assessment. Factors to take into account include:
- age, ability and maturity of pupils;
 - special educational and/or medical needs;
 - nature of journey, venue(s) and activities;
 - experience and competence of staff.

DfE guidelines provide benchmark guidance on ratios as follows.

The Rookeries Carleton J, I and N School

Educational Visits and School Trips Policy and Procedures

Day visits

Recommended adult/pupil ratios for normal day visits are:

- **Foundation:** 1 teacher or adult for every 4 pupils
- **Key Stage 1:** 1 teacher or adult for every 6 pupils on day visits
- **Key Stage 2:** 1 teacher or adult for every 10 pupils on day visits.

Residential visits

- A minimum of 2 teachers or adults.
- 1 teacher or adult for every 10 pupils.
- Mixed gender groups should have at least 1 male and 1 female teacher.

6.10. **Factors to consider when arranging appropriate supervision ratios**

The above ratios are guidelines that should not normally be exceeded. Schools should, however, assess the risks associated with the visit and arrange an appropriate supervision ratio for the particular group, venue and activities. Pupils with special needs or very young pupils may need very high ratios through the support of parents and other adults. Ratios will need to be increased for certain outdoor activities. Ratios may be reduced for short local routine visits.

6.11. **Number of teachers**

A minimum number of two teachers/adults with each group is good practice. However, for small groups in certain circumstances the Head teacher/EVC and visit leader may agree that only one supervising teacher is required. On residential visits it is usually necessary that both male and female adults accompany a mixed party though parties of younger pupils can often be adequately supervised by female adults. There should always be a male and female adult with any mixed group abroad.

7. Insurance and licensing

- 7.1. When planning activities of an adventurous nature in the UK, the EVC will instruct the trip leader to check that the provider/s of the activity holds relevant licences and has relevant insurance. The trip leader uses the attached EV_VN2 form from EVOLVE. This is regularly updated and is available online to all trip leaders.
- 7.2. Insurance will be organised for every trip, no matter how short, to ensure adequate protection and medical cover.
- 7.3. Where a crime is committed against a member of the party, it will be reported to local police as soon as possible.

8. If things go wrong

- 8.1. In the case of accidents and injuries while on a school trip in the UK, the school's accident reporting process will begin as detailed in the Accident Reporting Procedures.

9. SEN and disabilities

- 9.1. Where possible, activities and visits will be adapted to enable pupils with SEN and/or disabilities to take part.

The Rookeries Carleton J, I and N School

Educational Visits and School Trips Policy and Procedures

- 9.2. Adequate support from staff or other suitable adults for any such pupils should be considered.
- 9.3. Where this is not possible, an alternative activity of equal educational value will be arranged for the pupil/s.
- 9.4. The Disability Discrimination Act should be referred to if staff are in any doubt. This can be found at:

<http://www.legislation.gov.uk/ukpga/1995/50/contents>

10. Finance

- 10.1. Payments can be made by cash or cheque or by using the schools online payment system. Cash or cheques should be in a sealed envelope marked with the child's name and class and handed in to the child's classroom. Payments will be forwarded to the Finance Office for processing. The Finance Office can provide staff with a printout of all payments received for a particular trip on request.
- 10.2. Under no circumstances should school trip money be processed through personal accounts.

11. Planning school trips

- 11.1. The following policies should be considered in conjunction with this policy:
 - Accident Reporting Procedures
 - Charging & Remissions Policy
- 11.2. Prior to planning a school trip, the trip leader should familiarise themselves with and understand the following. Please be aware that the documents beginning with EV are always being reviewed and should be looked at in the online EVOLVE service to ensure up to date documents are used:
 - Offsite Approval Form
 - EV_GD3 Guidance on the use of Generic Local Authority Risk Assessments (attached in the appendices)
 - EV_CL1 Visit Planning Checklist (for more complex/2residential visits)
 - EV_VN2 Provider assurance form
 - EV_GRA1 All Visits Risk Assessment
 - The DfE's guidance [Health and Safety: Advice on Legal Duties and Powers.](#)
 - The HSE's guidance [School Trips and Outdoor Learning Activities.](#)

12. Procedures

- 12.1. Any person organising a trip must follow and complete the checklist, see Appendix 1
- 12.2. All documents referred to in the checklist are included in the Appendices.
- 12.3. The school office staff are responsible for ensuring trip money and permission slips are collected for all pupils prior to the visit. These should be recorded on a class spread sheet to evidence receipt– see Appendix 7

The Rookeries Carleton J, I and N School

Educational Visits and School Trips Policy and Procedures

- 12.4. Upon receipt of an approved Costing Form and an approved Off-site Approval Form the Office will set the trip up on Parentmail and PS Financials
- 12.5. All payments will be processed by the Office on Parentmail against the individual pupil
- 12.6. Following the trip, the Finance Office will reconcile and close the trip as per the Costing Form (Appendix 2)
- 12.7. The Finance Office will retain permission slips until after the trip has taken place and all other documentation until the young person is 21 regardless of whether there has been an incident reported
- 12.8. The School Business Manager will report to Governors the financial impact of all trips

Appendix 1 – Educational Visit Flow Chart

Arranging an Educational Visit – Flow chart

Action	Initial and date when completed	Additional notes
Decide on an Educational Visit		
Complete costing form (appendix 2) and present to Head of School for approval		
Complete a risk assessment (appendix 3) and an Education Visits Approval Form (appendix 4) and present to Head of School for approval. Ensure you have signed both forms. For more complex visits e.g. residential, form EV_CL1 (appendix 5) needs to be completed.		
Once approved, enter trip details for more complex visits onto Evolve.		
Confirm the venue / date / coach bookings for the Office. Record the date of the educational visit on the school calendar. Forward paperwork to the Office.		
Compose a letter to parents using the standard trip template letter (appendix 6). Email the letter to the Office to be distributed.		

All payments received in class need forwarding to the Finance Office for processing and recording on a class spreadsheet (appendix 7)



Inform the kitchen of your visit. Any pupils entitled to Free School Meals are entitled to a packed lunch on the day of the visit. Therefore this must be ordered in advance with the kitchen.



Day of the visit

- List of children on the trip to the Office
- All adults attending to read and sign the risk assessment; to be passed to EVC
- 1st Aid Bucket containing general first aid kit and child specific medication
- Visibility jackets for adults
- Sick bucket / water for the coach
- Spare clothes / underwear for children

Appendix 2 – Costing Form

<u>COSTING INFORMATION FOR PROPOSED VISITS</u>	
VISIT:	
DATE OF VISIT:	
YEAR GROUP(S):	
PUPIL NUMBERS:	
ADULT NUMBERS:	
SUPERVISION RATIO: EYFS 1:4/KS1 1:6/KS2 1:10	
COST OF ENTRY:	
COST OF COACHES:	
ADD 30p PER PUPIL PARENTMAIL FEE:	
TOTAL COST OF VISIT:	
COST PER PUPIL (BEFORE ADJUSTMENT):	
PROPOSED SUBSIDY/MARK-UP * PER PUPIL:	
COST PER PUPIL (ACTUAL COST CHARGED):	
PREDICTED SUBSIDY/MARK-UP * FOR SCHOOL:	
CHECKED BY:	
AUTHORISED BY EVC:	
<u>POST TRIP REVIEW</u>	
APPROVE ANY PUPIL NON-PAYMENT:	
OVERALL INCOME RECORDED ON SPREADSHEET:	
OVERALL INCOME RECORDED ON PSF: (ACCOUNT SUMMARY WITH NOMINAL DETAILS REPORT)	
ACTUAL COST OF VISIT:	
ACTUAL SUBSIDY/MARK-UP * FOR SCHOOL:	
CHECKED BY AND CLOSED FOR INPUT ON PSF:	

* DELETE AS APPROPRIATE

Appendix 3 – Guidance notes and EV_GRA1 All Visits Risk Assessment

GUIDANCE ON THE USE OF LOCAL AUTHORITY (LA) GENERIC RISK ASSESSMENTS

What are generic risk assessments?

Generic Risk Assessments highlight commonly identified hazards (i.e. things with the potential to cause harm) and control measures (i.e. ways of reducing the likelihood of the hazard causing harm) associated with general locations, events or activities (e.g. visits to coasts).

The main aim of these generic risk assessments is to help raise overall safety standards by:

- Raising awareness of possible hazards and control measures that might have previously not been considered.
- Promoting recommended good practice.
- Providing information that can easily be shared with, and adapted by, all leaders (and group members) to ensure a common understanding of expected standards and responsibilities during a visit.

Generic risk assessments should therefore help to:

- safeguard leaders / teachers from the threat of litigation, by providing clear written evidence of the risk assessment and management measures that have been taken (as required by law);
- Save considerable time and effort by providing an initial framework of ideas for discussion (rather than starting with a blank sheet of paper!)

How LA generic risk assessments should be used

Generic risk assessments provide a useful starting point for discussion and consideration, **BUT they must never be regarded as a finished product.**

Whilst generic risk assessments seek to identify and highlight key hazards and control measures, it should never be assumed that all significant issues have been recognised and included. It is still up to the leaders to identify and add any other hazards or control measures that are appropriate.

In modifying a generic risk assessment, the goal should be to produce a specific risk assessment that is:

- Suitably adapted
- Fit for purpose
- Specific to that location / activity / visit / individuals
- Accepted by those involved
- Signed
- Dated
- Reviewed as appropriate

Generic risk assessment forms are flexible, whilst the control measures suggested might all be worthy of consideration, it is understood that they are not all universally applicable for all groups and situations. However, if an accident were to occur as a consequence of a control measure not being adopted, a court of law might expect the leader to justify that decision!

It must be clearly understood by all leaders that risk assessment and management is an ongoing process that involves far more than written documents. Therefore, during a visit, all leaders must maintain a 'Dynamic or Ongoing Risk Assessment' (this is NOT a form!!!) by remaining alert to, and responding to, changing circumstances or additional unforeseen hazards.

Establishment generic risk assessments

For risk assessments that are used frequently and/or regularly (e.g. 'Swimming lessons'), it may be appropriate and acceptable for the form to be completed, signed and updated annually by all those to whom it might have relevance (i.e. staff who wish to be involved in visits during the year).

For any other specific, non-routine visits, the relevant risk assessments should be completed and signed in addition.

New staff arrivals and prospective new leaders should be made aware of any risk assessments that are used regularly, and should be asked to read and add their signatures, in acceptance of the recognised and adopted safety measures.

Generic risk assessments for outdoor or adventurous activities (e.g. Rock Climbing)

The generic risk assessments for outdoor or adventurous activities should be used only on those occasions when members of your own staff are directly responsible for the leadership or instruction of the activities (e.g. your own staff are leading/instructing a canoeing group).

If external service providers (e.g. instructors from a residential outdoor centre) are directly responsible for the leadership/instruction of activities, the Overall Group Leader (from your establishment) is not responsible for completing generic risk assessments for each activity, and therefore the generic risk assessments are not applicable.

However, the Overall Group Leader (from your establishment) has a duty to check that the external activity provider has full safety management systems in place, and it would be appropriate to obtain a written assurance from the providers that they have their own risk assessments for each activity, and that these are available for inspection if required.

Check list for modifying a Generic Risk Assessment

Tick when
Complete

Insert the name of your establishment.	
Delete the work "GENERIC" from the text in the document header and add an appropriate title.	
Delete the paragraph in the document footer (this will give more room for additional information)	
Consider the hazards and controls and delete / amend as appropriate to the specific location / activity / visit / individuals. If you feel a specific control is not appropriate it would be worth adding a small note explaining your reasoning.	
Consider what further action may be required.	
Identify any additional risks associated with the specific location / activity / visit / individuals.	
Identify who is at risk from these additional risks	
Identify appropriate control measures to reduce the risk to acceptable levels.	
Consider what further action may be required.	
Tick the end column only when you are sure that all the controls are in place.	
Insert the location of the visit	
Insert the date of the visit	
Insert the review date for the risk assessment or delete if not appropriate	
Insert the name of the person carrying out the risk assessment (In most circumstances this should be the visit leader or a member of staff that will be on the visit)	
Sign the risk assessment (This could be done electronically)	
Insert the date	

ESTABLISHMENT: The Rookeries Carleton J&I School, Pontefract

1. GENERIC RISK ASSESSMENT – ALL EDUCATIONAL VISITS
Page 1 of 2

HAZARD	WHO IS AT RISK?	CONTROL MEASURES	WHAT FURTHER ACTION IS NEEDED?	TICK IF ALL IN PLACE
Exposure to weather (cold injury, heat injury, over exposure to sun)	Young people, staff	<ul style="list-style-type: none"> Consider possible weather conditions and plan appropriate programme, clothing and equipment (warm and waterproof clothing and, in summer, sun protection) Plan for young people who may/do not bring suitable kit:- check before departure and/or bring spares Daily weather forecast obtained and plans adjusted accordingly Ensure supervising staff are competent and understand their roles Ratios in line with school visit costing template Plan and use suitable group control measures (e.g. buddy systems, large groups split in small groups each with named leaders, coloured caps etc) Discuss itinerary and arrangements with young people Briefing to all on what to do if separated from group head counts by leaders particularly at arrival/departure points, and when separating and reforming groups 		
Young people lost or separated from group, inadequate supervision	Young people	<ul style="list-style-type: none"> Avoid known high risk situations Take necessary avoidance action if encountered Ensure those with known allergies carry medication 		
Animals, insects, poisonous plants etc	Young people, staff			
Illness or injury	Young people, staff	<ul style="list-style-type: none"> Group leader to have a good working knowledge of first aid Leaders know how to call emergency services (including overseas if applicable) Young people and parents are reminded to bring individual medication and this is kept securely - inhalers First aid equipment carried Mobile phones carried if available Emergency contacts with establishment/management team and parents arranged 		
Special needs of specific young people – medical, behavioural	Young people	<ul style="list-style-type: none"> Obtain information from parents Take advice from SENCO if appropriate Make necessary arrangements for individual young people including individual risk assessment and additional staffing as necessary 		
Leaders' own children	Young people, other children, staff	<ul style="list-style-type: none"> If staff or volunteers' families join group, supervision must not be compromised Staff children are similar age to group and supervised with young people or separate supervision must be arranged 		

ESTABLISHMENT: The Rookeries Carleton J&I School, Pontefract

1. GENERIC RISK ASSESSMENT – ALL EDUCATIONAL VISITS
Page 2 of 2

HAZARD	WHO IS AT RISK?	CONTROL MEASURES	WHAT FURTHER ACTION IS NEEDED?	TICK IF ALL IN PLACE
Indirect/remote supervision (includes field work, souvenir shopping, theme parks, historic sites etc)	Young people	<p>IF REMOTE SUPERVISION IS PROPOSED</p> <ul style="list-style-type: none"> • Check location is suitable for this mode of supervision • Ensure young people sufficiently briefed and competent (any individual young people for whom indirect supervision not suitable must be directly supervised) • Clear guidelines and emergency procedures set and understood • Young people remain in pairs or groups (e.g. buddy system – each responsible for named other) • Rendezvous points and times set • Young people know how to contact staff • Staff understand they are still responsible • Parents informed and consent given 		
Return from visits particularly after school hours	Young people,	<ul style="list-style-type: none"> • Return is pre-planned and parents are informed where to collect young people from (or it is pre-agreed with parents that older young people will walk home) • Suitable arrangements are made for any young people whose parents fail to collect them 		
Emergencies	Young people, staff	<ul style="list-style-type: none"> • The establishment has an emergency plan for dealing with an incident on a educational visit • Contact details of parents, group leader, establishment and, if appropriate, management team/establishment after-hours number are held by group leader and emergency contact • Leader and emergency contact has instructions as to what to do in an emergency 		
Walk to local venues (injury, death)	Young people, staff	<ul style="list-style-type: none"> • Work on foot planned to avoid fast roads wherever possible • Supervision on pavements, roads and especially crossing of any fast roads is pre-planned • Pupils are briefed re hazards and behaviour required • If abroad, pupils briefed re right-hand traffic and any in-country traffic rules 		

This generic risk assessment identifies the common hazards and control measures associated with this type of visit or activity. Before undertaking the activity, establishments must also make a written risk assessment of any specific risks associated with their particular visit, including risks associated with travel, sites, activities and the group of Young People. Please read "GUIDANCE ON THE USE OF GENERIC RISK ASSESSMENTS" before using this document.

LOCATION OF VISIT: (Insert text here)

DATE(S): (Insert date here)

REVIEW DATE: (Insert date here)

ASSESSMENT CARRIED OUT BY (NAME): (Insert name here)

SIGNED: (Insert signature here)

DATE: (Insert date here)

Appendix 4 – Off Site Approval Form

The Rookeries Carleton J, I & N School

SCHOOL VISITS AND OFF-SITE APPROVAL FORM

Group Leader: Contact address, phone, email

Dates:

Group:	Number of Pupils			
	Male	Female	Total	Ages

Venue: Address of residential base or destination

Nature of Activities	Led by: Contractor, Named School Staff

Purpose of Trip:

Transport and Travel Arrangements: e.g. School Drivers, Contractors, append details

Staff and Volunteers:	Main Duties: Deputy leader, assist activities, first aid, supervision

Emergency School Contact(s): 24hr, mobile and landline phone number
Main Contact(s) on Visit: 24hr, mobile and landline phone numbers

List appended details: Letter to Parents, Contact details, Visit Planner, Costs	Notes:

I confirm that the visit will be arranged in accordance with the Wakefield Guidance for Off-site visits.

Signed Visit Leader: _____ **Date** _____

I confirm that the visit is approved. **Head teacher / EVC:** _____ **Date** _____

I confirm that the visit is endorsed. **Governor(s):** _____ **Date** _____

Comments: Further info required, not approved, conditions of approval

VISIT PLANNER

GROUP LEADER –

Use with the approval form. The Group Leader Checklist gives details for each heading

CHECKS	NOTES (or where information attached)	Checked
INITIAL PLANS		
Timetable for Planning/Approval.		
Exploratory Visit		
Accommodation		
Contracted Providers		
STAFFING AND SUPERVISION		
Staff Roles and duties		
Child Protection / CRB Checks		
General Supervision and Ratios		
Gender issue(s)		
Arrangements for Special Need(s)		
Participant preparation, rules & conduct		
Remote Supervision. Unaccompanied parts of the visit		
Activity Supervision / Leadership		
Staff Briefing		

CHECKS	NOTES (or where information attached)	Checked
TRANSPORT AND TRAVEL		
Travel Details / Contractors		
Travel Supervision		
Minibuses/Drivers		
Private Cars		
INFORMATION FOR PARENTS, PARTICIPANTS AND LEADERS		
Information to Parents		
Emergency / Consent / Medical forms		
Parent Briefing		
Participant Briefing		
ACCIDENT AND EMERGENCY PROCEDURES		
First Aid		
Emergency Plan / Contacts		
Accidents / near miss reporting		
Insurance		
Cost and Finances		
Monitoring and Review		

ASSESSMENT OF ALL RISKS

If *none* please record this in appropriate column

Possible hazard	Action to be taken	Who responsible

All arrangements appropriate _____

Confirmed _____ Date _____

Appendix 5 – EV_CL_1 Visit Planning Checklist



EV_CL1

Wakefield council - VISIT PLANNING CHECKLIST

GM 06/2012

FOR COMPLETION BY THE VISIT LEADER / EVC

This checklist is to help the Group Leader, EVC and Headteacher / Service Manager to ensure:

- The health, safety and welfare of young people and staff
- The maximum educational benefit to pupils
- Effective management, planning, organisation and leadership.

The checklist may be an aide memoire and note pad to be used by the Group Leader and could also provide a formal record for the Head, EVC, Governors or the LA. It may therefore be used by the Headteacher / Service Manager to decide whether final approval for a visit is given or for monitoring purposes.

Name of School / Establishment:

Visit Leader:

Visit date(s):
dd/mm/yy

	Yes	N/A
<p>1. GROUP LEADER Is there a clearly identified group leader, sufficiently experienced and competent to assess the risks and manage the proposed visit or activity?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>2. DEPUTY LEADER Is there a clearly identified deputy leader, sufficiently experienced and competent to assist the group leader and take charge in the event of group leader becoming unable to continue (for what ever reason)</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>3. PURPOSE Is there a clearly identified purpose for the whole programme and any of its constituent parts, appropriate to the age and ability of the group?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>4. RISK ASSESSMENT Has the group leader assessed the risks involved in all aspects of the visit or activity (including any 'free time') and recorded the significant findings. Where LA generic risk assessments are used it is essential that they are suitably adapted for the specific visit.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>5. LOCATION Is the proposed location of the visit suitable for the activity to be undertaken and manageable for the group?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>6. ADVICE Has the group leader sought advice from someone with expertise or technical competence where there is uncertainty about safe practice? This may be the establishment's EVC, another member of your establishment's staff or the LA's Outdoor Education Advisor.</p>	<input type="checkbox"/>	<input type="checkbox"/>

Wakefield council - VISIT PLANNING CHECKLIST

7. APPROVAL

Yes N/A

All visits should be authorised by the Headteacher / Service Manager via EVOLVE. If the proposed visit is overseas, residential, or adventurous including hazardous location e.g. around / near natural water, then EVOLVE will automatically submit the visit to the LA for approval.

8. VENUE / EXTERNAL PROVIDER

Does the visit involve hazardous activities booked through commercial, charitable or private provider?

If so, has the provider been sent and returned the EV_VN2 Provider Assurance Form?

If there are un answered questions on the returned EV_VN2, have these been followed up and satisfactorily resolved?

9. STAFF

Are members of staff, instructors or adult volunteers leading hazardous activities suitably qualified and experienced, i.e. competent to do so?

Have members of staff or adult volunteers been vetted, regarding child protection, where necessary?

Does staffing include male and female supervision, where necessary?

10. STAFF/PUPIL RATIO

Will the group have an acceptable staff/pupil ratio necessary for the activities proposed? Do plans and staffing ratios reflect the needs of people with disabilities?

11. PRELIMINARY VISIT

Has the group leader made a preliminary visit to the site or centre to be visited, to check arrangements?(E.g. travel time, access and permission, facilities and equipment, leisure or recreational facilities for residential stays, staff support, guides or programmes of work, potential arrangements, and references from previous users). If not, has action been taken to ensure the group leader is aware of potential hazards and opportunities?

12. PARENTAL CONSENT

Has informed parental consent been obtained for the visit as a whole and for any hazardous activities, which are planned?

13. DIETARY, MEDICAL AND ANY OTHER CARE NEEDS

Are sufficient measures in place to make appropriate staff (e.g. Catering staff, instructors, other staff accompanying the visit) aware of dietary and medical needs of young people and staff?

Have suitable and sufficient first aid arrangements been made?

14. THE PROGRAMME

Do young people and staff have the appropriate clothing and equipment necessary for the activities proposed and allowing for a range of weather conditions?

If not, will another provider be offering additional appropriate equipment?

Are the young people prepared for and physically capable of taking part in the proposed activity?

Is the programme suitable for all of the participants?

Is there an alternative programme in the event of poor weather, for example?

Yes N/A

15. FINANCE AND INSURANCE

Have adequate arrangements been made to finance the visit and manage the finances?

Are you aware of VAT regulations, e.g. regarding criteria for VAT recovery?

Is there adequate and relevant insurance cover?

16. TRANSPORT

Is appropriate and legal transport available?

Are there suitable and sufficient qualified drivers for any planned minibus journey?

Will departure and return times be made known to staff, young people and parents?

Is there a contingency plan, in the event of a delay or early return?

17. BRIEFING FOR YOUNG PEOPLE

Will the young people be properly briefed on the activities they will undertake during the visit?

The briefing may need to include:

- Appropriate clothing and equipment
- Rendezvous procedures
- Safety risks of jewellery
- Groupings for study or supervisory purposes
- A system of recall and action in emergencies
- Agreed codes of conduct and behaviour
- Significant hazards
- Relevance to prior and future learning

18. BRIEFING FOR STAFF

Will the party leader also brief adults and voluntary helpers?

The briefing may need to include:

- Anticipation of hazards and the nature of the programme
- Defining roles and responsibilities of staff
- Careful supervision, to cover the whole time away
- Standards of behaviour expected from young people
- Regular counting of participants
- How much help to give to young people in their tasks
- A list of names of people in sub groups
- Emergency procedures

19. EMERGENCY CONTACT

Has a named point of contact been identified at home or at "base" in the event of an emergency, who has a contact list of the group members, including staff, and a programme of the group's activities?

Are sufficient staff aware of procedures and relevant phone numbers in the event of an emergency?

Signature:

Print:

Date:
dd/mm/yy

This check list should be files with the rest of the documents related to this visit and should be made available for inspection if required for monitoring.

Appendix 6 – Template letter

Dear Parent / Carer,

NAME AND DATE OF TRIP

Year xxxx will be visiting xxxx on xxxx. The coach will be leaving school at xxxx and returning for xxxx

To keep costs low school is subsidising the visit by xxxx (overall or per pupil) therefore the cost will be £xxxx per child.

This is a non-refundable voluntary contribution, however if insufficient funds are received the trip may have to be cancelled. If the trip is cancelled by the school, contributions received will be returned. Trips are costed in line with the Charging and Remissions Policy which is available on the school website.

Contributions are preferred via Parentmail, however they can be made by cash or cheque. Please ensure you also complete and return the reply slip below. Cheques should be made payable to 'The Rookeries Carleton J&I School'.

If your child receives Free School Meals due to the benefits you receive and you would like details regarding the Scheme of Aid Assistance please tick the box below.

Amend as appropriate based on Key Stage:-

All children will need to take a packed lunch with them.

Due to the Universal Infant Free School Meals scheme, your child is entitled to a free school packed lunch. OR If your child is entitled to free school meals a packed lunch can be provided by school.

Please complete and return all forms and contributions by xxxx.

Yours sincerely

The Rookeries Carleton J, I & N School Name and Date of Trip

Name of Child: Year:.....

- I give permission for my child to attend the proposed trip
- I have paid using ParentMail / I enclose a contribution of £xxxxx (delete as appropriate)
- I acknowledge the need for responsible behaviour on the part of my child and understand that my child may be withdrawn from the trip if they do not meet behaviour expectations within lessons.
- I give permission for any medical treatment, including the use of anesthetic, to be given in an emergency.

My child is entitled to free school meals and I would like details of the Scheme of Aid assistance

My child is entitled to free school meals and I would like them to be provided with a packed lunch

Signed: _____ Parent/Carer

Emergency contact telephone number: _____

Appendix 7 – Example class spreadsheet

TRIP NAME: FILEY
TRIP DATE: 15.7.15
CLASS: 2
COST OF TRIP: £5

SURNAME	FIRST NAME	AMOUNT PAID	PAYMENT TYPE	PERMISSION SLIP	DATE RECEIVED
BLOGGS	JOE	£5	PARENTPAY		10.7.15
CHILD	EMMY	£5	CASH	Y	9.7.15
CLEAR	CRYSTAL	£5	CHEQUE	Y	10.7.15
KIDD	GEMMA	£5	PARENTPAY		9.7.15