

7. Management roles & responsibilities – The Headteacher/Senior Manager

7.1 The Headteacher/Senior Manager should ensure that establishment practice follows the requirements and recommendations of their employer's guidance.

7.2 The Headteacher/Senior Manager is responsible for ensuring that:

- ✓ the school/establishment's own Educational/Offsite Visits policy is established and implemented (see Appendix CPA 7.1 at end of this chapter for a model template);
- ✓ the Local Authority's "Guidance for the Management and Leadership of Offsite Visits" is followed;
- ✓ the Governing Body is kept informed of all relevant issues relating to offsite visits;
- ✓ a suitable Visits Coordinator is appointed and the Local Authority informed. Where there is no Visits Coordinator, the responsibilities pass to the Headteacher/Senior Manager by default;
- ✓ Group Leaders are competent to lead the visit and monitor risks throughout a visit or activity and make appropriate decisions.

For further information, see the Outdoor Education Adviser Panel national guidance webpages via www.oeapng.info

7.3 If the Headteacher/Senior Manager does not have the necessary expertise and knowledge to make a judgement about the suitability of a leader or other assistants, or about the wisdom of a particular activity, the LA's Educational Visits Officer should be contacted for advice.

7.4 Headteacher/Senior Managers must be clear about their role if taking part in an offsite visit. In some cases, the Headteacher/Senior Manager might be the leader. However, it does not follow that he/she automatically takes the role of leader. Whoever is Overall Group Leader must be able to exercise full responsibility, and this must be accepted by everybody else taking part, including senior colleagues. The Headteacher/Senior Manager should retain a general oversight, but they need not be involved in the routine management.

7.5 According to the school/establishment's policy agreed by the Governing Body, the Headteacher/Senior Manager may give approval for certain types of visit or activity, and delegate certain types of approval to the Education Visits Coordinator (EVC) with the agreement of the Governing Body, and recorded in the minutes of the Governing Body meeting at which this is agreed. Similarly, certain other responsibilities may be formally delegated to the EVC.

7.6 When circumstances change after Final Authorisation has been granted, Headteacher/Senior Managers must ensure the continued security of the venture or, if necessary, withdraw approval and cancel the visit or activity. It is their responsibility to ensure that Overall Group Leaders inform the Local Authority immediately in writing of any significant material changes to arrangements already approved by the Local Authority.

7.7 In addition, the Headteacher/Senior Manager must:

- ✓ ensure the school/establishment has its own up-to-date policy for off-site visits and that it complies with the Local Authority's "Guidance for the Management and Leadership of Offsite Visits" (see Appendix CPA 7.1 "Model School Educational Visits Policy" at end of this chapter and in Appendices section);

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7. Management roles and responsibilities – Headteacher/Senior Manager

- ✓ be aware of all relevant national regulations and guidelines, including Health and Safety and Inclusion/Equality requirements;
- ✓ regularly review the school/establishment's policies and procedures for off-site visits and activities. The school's Headteacher/EVC should complete the Manager Review (an online audit of our school's educational visits policies and procedures that is accessible for managers via the front page of ROVER online) and share the findings with the Governors and the LA Educational Visits Officer - at least every 3 years or whenever a new Headteacher is appointed. Proposed actions in response to the review should be carried out in accordance with the target completion dates stated on the Review form, and reviewed annually by all key managers;
- ✓ make details of off-site visits and activities available to the Governing Body or its delegated member in accordance with the school/establishment policy and that they have the opportunity to question or challenge as necessary;
- ✓ ensure all staff involved in off-site visits or activities have access to and understand their responsibility to follow the Local Authority/Employer and school/establishment policies;
- ✓ maintain an Offsite Visits file, as the central source of detail relating to all offsite visits, and that records of previous visits are stored appropriately;
- ✓ ensure that every visit or activity is prepared, planned and managed appropriately and that staff/volunteers receive any appropriate briefing, induction or training;
- ✓ appoint or nominate a Visits Coordinator with clear, agreed and specific duties;
- ✓ authorise directly, or by delegation to the Visits Coordinator, all offsite visits and offsite activities;
- ✓ ensure that Group Leaders have sufficient training and knowledge to undertake their responsibilities and that they are given sufficient time for all aspects of planning, preparation, pre-visits and risk assessment;
- ✓ ensure that Local Authority/Employer approval is gained for the necessary visits or activities;
- ✓ ensure that effective child protection and safeguarding procedures are in place;
- ✓ determine the school/establishment's emergency procedures and maintain full support and a direct telephone contact for the complete duration of all off-site visits or activities. The contact should have suitable experience and must have authority to make significant decisions and be able to contact Headteacher/Senior Manager/Chair of Governors if appropriate;
- ✓ establish a procedure whereby parents/guardians can be informed quickly about incident details by the school/establishment rather than through the media or group members;
- ✓ ensure all staff and other supervising adults understand the school/establishment and Local Authority/Employer emergency procedures;
- ✓ recognise that support should be sought from the Local Authority's Press Officer when dealing with the media;
- ✓ where more than one centre in an area of the visit is being used there is coordination and suitable communication systems between them;

CODE OF PRACTICE (CP)

7. Management roles and responsibilities – Headteacher/Senior Manager

- ✓ have a system to monitor off-site visits and activities through checks of practices before, during and after the venture;
- ✓ have a review process for each visit/activity/on-going arrangement to inform future planning of similar ventures.
- ✓ have a system to record all accidents, incidents and near misses, and report them to the Local Authority/Employer or HSE where appropriate (all records of significant accidents to employees and young people should be kept for a minimum of 6 years – and until the young person reaches the age of 21, if a serious accident/incident is thought likely to be investigated further);
- ✓ ensure that appropriate records, and relevant details (e.g. risk assessments) of all offsite visits are maintained for a minimum of 6 years - and until the young person reaches the age of 21, if a significant accident/incident during the visit is thought likely to be investigated further;
- ✓ ensure that appropriate records are kept of staff leadership experience/qualifications and of training given/received;
- ✓ ensure that staff and governors receive appropriate training regarding the management, planning and leadership of offsite visits;
- ✓ ensure that systems are in place to meet the financial regulations and that all staff understand and comply with them;
- ✓ be aware of the need to obtain best value.

7.8 For each visit the **Headteacher/Senior Manager** must ensure, as far as is reasonably possible, that:

- ✓ the visit has appropriate written approval;
- ✓ the visit has sound and valid objectives;
- ✓ the staffing ratios and competencies are adequate and approved;
- ✓ all procedures have and will be followed;
- ✓ the plans are suitable for the age, aptitude and experience of the particular young people;
- ✓ there is a contingency plan (Plan B);
- ✓ ensure inclusion and equal opportunity policy requirements are fulfilled;
- ✓ risk assessments have been completed, reviewed or updated;
- ✓ suitable risk management processes are in place;
- ✓ suitable measures are taken to safeguard group members with additional or medical needs;
- ✓ all adults involved are competent to carry out their responsibilities;
- ✓ the overall group leader, assistant and other volunteer leaders understand their roles and responsibilities, the plans and emergency procedures;

CODE OF PRACTICE (CP)

7. Management roles and responsibilities – Headteacher/Senior Manager

- ✓ correct charging and financial procedures have been followed;
- ✓ adequate insurance is in place;
- ✓ appropriate checks have been completed of locations and providers to ensure they are suitable for the group's needs (including checks that providers of licensable activities hold a valid AALS licence);
- ✓ full emergency and delayed return contact arrangements are provided by the school/establishment and that the Overall Group Leader and nominated Emergency Home contact has all names, addresses and contact details of the entire party;
- ✓ providers' emergency procedures link with those of the school/establishment and Local Authority/Employer;
- ✓ first aid and general welfare provision is adequate;
- ✓ fully informed written parent/guardian consent has been obtained;
- ✓ where appropriate, a meeting with parents/guardians is arranged and that a record is kept of questions raised and responses given;
- ✓ carry out any other reasonable action or check to ensure the Health, Safety and Welfare of the young people and adults involved;

A model template School Educational Visits Policy

(N.B. this model policy document could be used and adapted by other establishments/organisations if appropriate)

(to be revised by Headteacher/Governors – amend text below in bold/italics)

XXXXXXXX School/Establishment

Educational/Offsite Visits Policy Statement

Last updated: ????

Date for next review: ????

Introduction

All offsite visits and activities (apart from work experience or college placements which are dealt with separately) that are organised and undertaken by the school are regarded as “educational visits”. Whenever pupils leave the school site under the direct or indirect supervision of school staff, they are undertaking an educational visit.

- ***Any amendments/exceptions??***

Aims and Objectives

The school aims to offer children a broad and balanced curriculum that promotes their spiritual, moral, cultural, mental and physical development, and prepares them for adult life. The school’s headteacher and governors recognise the value and importance of learning outside the classroom, and encourage staff to organise educational visits that enrich the curriculum and enhance the learning and development of our pupils.

- ***Amend?***

Types of visits organised by the school

The school offers a wide range of educational visits, including:

- ***Examples of day visits/year groups?***
- ***Examples of residential/year groups?***

Compliance

The school’s policy is to comply with the LA’s “Guidance for the Management and Leadership of Offsite Visits”. The school’s Educational Visits policy should also be read in conjunction with the other relevant school policy documents, such as the following:

- ***Health, Safety and Welfare policy statement?***
- ***Charging policy?***
- ***Safeguard/Child Protection?***
- ***Equal Opportunities/Inclusion/SEN?***
- ***Other?***

Access to Policies and Guidelines

Staff involved in the leadership and management of visits should be familiar with all relevant guidelines and policy documents, and should know how/where this information can be accessed.

The LA’s “Guidance for the Management and Leadership of Offsite Visits” are accessible via the LA Educational Visits webpage <http://www.eriding.net/all-ages/educational-visits/> and also via ROVER Online <https://www.eastriding.gov.uk/eforms> (username/password required from the LA Educational Visits Officer).

Roles and responsibilities (for details see LA Offsite Visits Code of Practice)

The Headteacher has overall responsibility for all the school’s educational visits. New/Acting Headteachers should contact the LA for guidance on taking up the position, and should access training from the LA as soon as possible during their first term regarding their responsibilities with respect to the management and approval of educational visits.

If the Headteacher is absent or unavailable, ***...Name.....*** will act as the appointed deputy, and fulfil the same responsibilities regarding the management and approval of educational visits.

The School's Educational Visits Coordinator (EVC) is ...Name..... (appointed 00/00/00, trained 11/11/11). The EVC oversees the planning and organisation of the school's visits, and provides advice and guidance to staff and Headteacher, including recommendations regarding the approval of visits. New EVCs should access training from the LA during their first term regarding their responsibilities with respect to the management and approval of educational visits, and should attend refresher/update training at least every 3 years.

The EVC role has admin support provided by....Name..... (appointed 00/00/00, trained 11/11/11). This role involves sending out parent letters?/obtaining medical details and consent forms?/ etc????

The Governing Body representative who is responsible for overseeing educational visits, and for assisting with the approval of res/overseas/high risk visits isName... (appointed 00/00/00 ?).

The LA Educational Visits Officer is Mr.Taff Bowles (tel 01482 392417 e. taff.bowles@eastriding.gov.uk).

Advice and Guidance

Staff should seek advice and guidance regarding educational visits from:

- the school EVC
- the Headteacher
- the LA Educational Visits Officer
- other experts with specialist/local knowledge (e.g. National Park ranger)

Training

The LA provides a range of training opportunities for staff involved in the management, organisation, and leadership of educational visits. A record of all training provided is maintained by **the EVC? /the Admin team?** and stored **in the school office? /on computer file?**

The school ensures the following training opportunities with regard to educational visits are made available:

- **Training for Headteachers? How/when?**
- **Training for EVC (including update courses every 3 years)?**
- **Training for Visit Organisers and Group Leaders? How/when?**
- **Training for NQTs and new staff? How/when?**
- **Training for TAs/others? How/when?**
- **Inhouse training at staff meetings? How/when?**

Monitoring

To assure quality of standards on educational visits...

- **the school's Headteacher and/or the EVC will normally accompany at least one visit per term/year to monitor real practice, and to assist with the review of policies and procedures??**
- **Records of these monitoring visits are stored in....??**
- **The school's Headteacher/EVC will complete the Manager Review (an online audit of our school's educational visits policies and procedures that is accessible for managers via the front page of ROVER online) and share the findings with the Governors and the LA Educational Visits Officer. This will normally be completed at least every 3 years (?) or whenever a new Headteacher is appointed (?). Proposed actions in response to the review will be carried out in accordance with the target completion dates stated on the Review form, and will be reviewed annually by the EVC (?), Headteacher (?), Chair of Governors(?).**

The following should be read in conjunction with the corresponding chapters in the LA “Guidance for the Management and Leadership of Offsite Visits”, and provide additional information and policy statements that are specific to the school:

1. Planning and approval procedures

Visits should be recorded, checked, and approved in accordance with the following procedures:

Category 1 - DAY VISITS (ROUTINE)

Local visits that take place frequently or regularly throughout the year, or over a specific period of time (e.g. a series of six weekly visits) e.g. visits to local library/swim pool/away sports matches.

Category 1 visits should be recorded using:

- ***In-house form (to be collected from office/EVC?)?/ROVER?/other?***
- ***LA Day Visits form (to be collected from office/EVC?)?/ROVER?/other?***

Category 1 visits should be checked and approved:

Internally - by the Headteacher (with EVC support)

Category 1 visits should be submitted for approval:

- ***at the beginning of the academic year to obtain “blanket approval” for the year? and/or***
- ***at least 2 weeks in advance of the first of a series of visits.***

Category 2 – DAY VISITS (NON ROUTINE)

One-off or occasional visits e.g. day visit to York Minster/Scarborough Sea Life Centre

Category 2 visits should be recorded using:

- ***In-house form (to be collected from office/EVC?)?/ROVER?/other?***
- ***LA Day Visits form (to be collected from office/EVC?)?/ROVER?/other?***

Category 2 visits should be checked and approved:

Internally - by the Headteacher (with EVC support)

- ***In addition, the Governing Body should be informed of visits that will take/have taken place???***

Category 2 visits should be submitted for approval:

- ***at the beginning of the academic year?***
- ***at least 2 weeks in advance of the first of a series of visits.***

Category 3 – UK RESIDENTIAL VISITS

Visits that involve one or more nights away from home in UK or Overseas.

Category 3 visits should be recorded using ROVER Online (see EVC to request username/password)

Category 3 visits should be checked and approved:

Internally - by the Headteacher (with EVC and Governor support), and

Externally – by the LA Educational Visits Officer

Category 3 visits should be submitted for approval:

- ***at the beginning of the academic year? / at least 6 weeks in advance of the first of the visit.***

Category 4 – OVERSEAS VISITS

Residential or day visits to any place outside England/Scotland/Wales.

Category 4 visits should be recorded using ROVER Online (see EVC to request username/password)

Category 4 visits should be checked and approved:

Internally - by the Headteacher (with EVC and Governor support), and

Externally – by the LA Educational Visits Officer

Category 4 visits should be submitted for approval:

- ***at the beginning of the academic year? /at least 6 weeks in advance of the first of the visit?***

For visits with significant financial commitment, “Outline Approval” should be obtained before firm bookings are made.

If any of the above 4 types of visit involve what may be regarded as “High risk activities or environments” they MUST be given an additional subcategory “A” classification:

Sub Category “A” – HIGH RISK ACTIVITIES and ENVIRONMENTS

All day visits, or residential or overseas visits that involve hazards that are significantly different or more serious (in terms of severity and/or likelihood) than might normally be encountered in everyday or school life e.g. a weekly climbing day visit = 1A, a day visit to dry ski slope = 2A, a residential stay at outdoor

centre = 3A, an overseas trekking expedition = 4A. All Sub Category "A" visits should be recorded using ROVER Online (see EVC to request username/password). All Sub Category "A" visits should be checked and approved:

Internally - by the Headteacher (with EVC and Governor support), and

Externally – by the LA Educational Visits Officer

All Sub Category "A" visits should be submitted for approval:

- **at the beginning of the academic year? / at least 6 weeks in advance of the visit?**

For visits with significant financial commitment, "Outline Approval" should be obtained before firm bookings are made. All staff who lead visits are required to **input their own information and assurances on ROVER Online? / meet with the school EVC to input information and assurances on ROVER Online?** All staff who lead visits are **required to have their own ROVER username and password?** Staff can request their own ROVER username/passwords by **either contacting directly the LA Educational Visits Officer or asking the school office? /school EVC?**

2. Visit objectives

All educational visits should have a defined purpose, with clearly stated, justifiable educational objectives, or else they may not be approved, and may not be covered by the LA insurance.

- **Example(s) of visits that might/might not be considered justifiable by the school?**

3. Selection of young people

Every effort is made to ensure that school journeys and activities are available and accessible to all who wish to participate, irrespective of special educational or medical needs, ethnic origin, gender or religion.

- **School specific procedures for considering exclusion of a pupil from a visit?**
- **School specific policy regarding inclusion of all those with special/medical needs? - e.g. transport provision**
- **School specific policy regarding involvement of children of staff on a visit?**
- **School specific procedures for leaving behind an accurate upto date list of participants?**

4. The Overall Group Leader/Visit Organiser

The Overall Group Leader must be assessed and approved as suitable and competent to fulfil their role and responsibilities by the Headteacher.

Any specific levels of competence/experience required by the school? e.g. LA guidance below:

- **Deputy Leaders should normally have been Assistant Leaders on at least 3 similar visits?:**
- **Overall Group Leaders should normally have been an Assistant or Deputy Leader on at least 5 similar visits, and been a Deputy Leader on at least 1 of those visits?**

Headteachers might require Overall Group Leaders of more complex and demanding visits (e.g. ski visits or overseas expeditions) to have much broader leadership experience.

- **Any specific levels of competence/experience required by the school e.g. Ski leader training?**

5. Deputy, Assistant and Volunteer Leaders

Visits normally require a Deputy Leader who is able to deputise, and take full responsibility for the Overall Group Leader, if necessary. Assistant Leaders should be chosen carefully, and must be assessed and approved as suitable and competent to fulfil their roles and responsibilities by the Headteacher, EVC and Overall Group Leader.

- **Any specific levels of competence/experience required by the school?**

Leaders should consider carefully the implications of family members being present, and the possible complications that might arise.

- **School policy regarding involvement of children of staff on a visit?**

The school has a responsibility to ensure that all adults involved in the supervision of children during school-related activities (including visits) are suitable people to work with children, and pose no threat to the young people in their care. Concerns about possible child abuse or poor practice by a member of staff, volunteer or other adult should be reported immediately. Young people on educational visits should at all times have ready access to a competent adult who has an appropriate level of first aid training. This normally requires at least one of the group's leaders to have an appropriate and current first aid qualification (6-8 hours of emergency aid training is the minimum training recommended for leaders on educational visits)

School specific policy regarding:

- **Use of teaching assistants?**

- **Use of sports coaches?**
- **Use of parents/volunteers?**
- **Safeguarding/child protection checks?**
- **First aider provision and ongoing training?**
- **Records of first aider training**

6. Staffing selection and supervision ratios

Effective supervision is of the utmost importance in maintaining the safety and welfare of the children on educational visits. The LA's "Guidance for the Management and Leadership of Offsite Visits" provide recommended minimum staffing ratios, but the choice of staff and the decision regarding ratios is still a matter of judgement for the Headteacher, after consultation with the EVC and Overall Group Leader (and LA Ed Visits Officer, if necessary), as part of the risk assessment and management process. It is generally good practice to have at least two adults accompanying any off-site experience so that there is some flexibility and reserve capacity if things go wrong. For overseas visits, at least 3 adults should normally accompany the group, as additional reserve capacity and flexibility are often vital in these circumstances. Particular consideration should be given to staffing levels and qualifications required for visits that involve adventurous/high risk activities, and those that involve indirect or remote supervision.

School specific policy regarding:

- **staffing ratios?**
- **minimum number of staff required?**
- **male/female staff for mixed groups?**
- **visits that involve adventurous/high risk activities, or involve indirect or remote supervision**

7. Selection and suitability of accommodation or venues to be visited

As part of the overall risk assessment process, and in keeping with their legal duty of care, the Overall Group Leader must take reasonable steps to check that any accommodation (e.g. youth hostel) that is used, and any venues (e.g. castles or museums) that the group plans to visit, are suitable, satisfactory, and acceptably safe. Many organisations now have websites or supply teacher information packs that provide all reasonable assurances regarding standards, or have obtained a Learning Outside the Classroom "Quality Badge". However, if necessary, the Provider Assurance Form (EV2) can be sent to the manager of a place of accommodation or venue to be visited, requesting signed, written assurances regarding their safety management systems and operating procedures. When planning a visit, the Visit Organiser (and other group leaders) should, wherever possible, undertake an exploratory visit to inspect and familiarise themselves with the accommodation to be used and venues to be visited.

School specific policy regarding:

- **checks required of accommodation/venues**
- **accommodation requirements – e.g. separate staff accommodation/balconies/swim pools?**
- **inspection visits?**

8. High risk activities and environments

Leaders who organise visits that involve high-risk activities and environments must be aware that such visits normally require a greater degree of planning and preparation by virtue of their complexity and unpredictability. All Category 1 and 2 (Day), Category 3 (UK Residential) and Category 4 (Overseas) visits that involve high risk activities and environments are classified as subcategory "A" and must be recorded on ROVER, and approved by the EVC, Headteacher, Governors, and Local Authority. Leaders and other supervisors must be sufficiently competent to supervise pupils in the activity/environment. Competence derives from knowledge, experience, training and personal qualities and may be evidenced by holding the relevant National Governing Body (NGB) award where appropriate.

The school keeps a record of staff qualifications, training and leadership experience. This is stored:

- **on the ROVER online database?**
- **and additional hard copies of information in the Educational Visits file?**

Visit Organisers should plan alternative activities and venues to cater for possible changes in circumstances (e.g. worsening weather or rising river levels), and all staff should be aware of these possible contingencies. The EVC will sometimes ask to see and check these plans.

School specific policy regarding:

- **specific levels of qualifications/competence/experience required?**

- **where and how records are kept of staff qualifications, training and leadership experience?**

9. Risk assessments and management

The school has a legal duty of care for its young people, and must therefore give careful consideration to the hazards involved during an educational visit, and ensure that risks are managed at reasonable and acceptable levels. Every visit must therefore be subject to a suitable and sufficient risk assessment that identifies all significant hazards. The Visit Organiser should undertake an appropriate risk assessment for each visit, and this should be shared/discussed/agreed by all visit leaders (including new leaders and volunteers) before the visit takes place. Appropriate written evidence of this process should be provided. The process of risk assessment should be a positive means of raising awareness of hazards and prompting constructive discussion regarding the best means of risk management – it should therefore be of real practical value to the leaders and group members, not just a paper exercise. A set of written generic risk assessments and a blank specific visit form is available on the Local Authority's Educational Visits website http://www.eriding.net/educ_visits/index.shtml and a link to this site is also available via ROVER Online.

School specific policy/procedures? e.g.

- ***all relevant generic risk assessment forms are reviewed, amended, and agreed by all relevant staff (within each department/as whole staff team?) at the start of each academic year and - if required - for new types of visits that are planned later in the year. If amendments to these forms are deemed necessary at any time (for example, following lessons learned from an incident or following suggestions of improved control measures), then these generic forms will be amended and agreed accordingly?***
- ***these generic forms are stored in a clearly marked file (labelled as....?) in the staff room/department office (?), and staff are encouraged to refer to these before each visit, especially if unsure about agreed practice or before undertaking visits that they are less familiar with.***
- ***new leaders/volunteers are asked to read all relevant forms and add their signed agreement before assisting with the leadership of a visit.***
- ***an additional specific visit risk assessment should be completed by the visit leaders for each visit to record and share additional information about potential hazards and precautions that may be particularly noteworthy for that specific group, doing particular activities, at specific sites on that visit. If there are no issues to add beyond those mentioned on the generic forms, this should still be recorded on the specific visit risk assessment as evidence that due consideration has been given. The specific visit risk assessment should also normally state which generic forms are relevant and have been referred to, and a note should be added if any control measures agreed previously on the generic risk assessment forms are not considered applicable or will not be complied with for that visit.***
- ***completed assessments are spot checked/approved by the school EVC/Head of Dept?***

10. Insurance and finance arrangements (including charging arrangements)

The Headteacher/EVC/Overall Group Leader must ensure that adequate insurance arrangements are in place for all educational visits, and Group Leaders should check carefully that the scope and level of cover provided is adequate for each visit. Visit Organisers should also check that any external service providers have sufficient public liability cover (normally at least £5 million).

School specific arrangements? e.g.

- ***The school pays annually for LA Voyager insurance which covers all school visits within the UK (providing the visits are correctly approved) - renewal of the Council insurance policy generally takes place when ??????. The Council also provide additional travel insurance for visits abroad, if required – contact the Council's Insurance team (01482 394195).***

The Visit Organiser and school EVC should ensure that:

- each visit is accurately costed and budgeted for;
- adequate allowances are made for additional unforeseen costs and changes in circumstances;
- financial plans – especially for more complex and committing visits – are checked over and agreed first by the EVC/Headteacher before financial commitments are made;
- for visits that involve substantial commitment financially (e.g. overseas expeditions), no firm bookings or financial commitments are made until the visit has been agreed and received "Outline Approval" by the relevant authorities;
- the costs of the visit are made clear to all concerned (including parents), including how much will come from school funds, and how much each parent will be charged or asked to contribute;

- money collected for visits is kept in a separate school account, and secure systems are in place to ensure that money is accessed and accounted for correctly.

School specific arrangements regarding finances and accounting? E.g.

- **school bank account for visits?**
- **authorization/signatures required for expenditure?**

Charging arrangements (for more details see school charging policy)

No charge may be made in respect of any activity that is deemed to take place in school hours. An activity is deemed to take place during “school hours” if 50% or more of the activity, takes place within school hours. If more than 50% is deemed to be outside of school hours then a charge may be made for “optional extras” only. For residentials, a school trip is considered to have taken place within school time if the number of school sessions missed by the pupils amounts to half or more of the number of half days taken up by the activity. The school will not charge for:

- any activity undertaken as part of the National Curriculum , or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.
- supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential trip
- transport provided in connection with an educational trip during school hours.

The school may ask parents for voluntary contributions towards the cost of these visits, but it must be clear that any contribution is genuinely voluntary.

Where it is not permissible to charge parents, any subsidy will come from:

- **school funds?, voluntary fund raising? voluntary parental contribution?**

The school may charge for activities that are provided wholly or mainly outside school hours, as long as these activities are optional extras (see details in the school charging policy) but any charge made in respect of individual pupils will not exceed the actual cost of providing the optional extra activity, divided equally by the number of pupils participating. The costs of the visit should be clear to all concerned, stating how much will be given from other school funds and how much parents are being expected to contribute. The school will normally make a charge for board and lodging on residential trips, and ask for a voluntary contribution towards transport and specialist instruction for certain activities.

Those pupils in receipt of free school meals are exempt from the cost of board and lodging during residential visits.

School specific policy regarding:

- **charging?**
- **optional extras that the school will charge for?**

11. Overseas visits (delete by school if not applicable)

All overseas visits (Category 4) require Local Authority approval as well as School inhouse approval. Because of the additional complexity and financial commitment involved, staff planning overseas visits should seek outline approval for the visit at an early stage from all the relevant authorities, before parents or the school make commitments. It is good practice, wherever possible, for the Visit Organiser to make an exploratory visit to a location. If this is not reasonably practicable, then the Visit Organiser should gather sufficient appropriate information and assurances (via website/teacher pack) about the location and facilities. The level of staffing required for overseas visits should reflect not only the direct supervision needs, but also the contingency plans made for emergencies. It is not uncommon for a member of staff to need to return home early or to accompany a group member to hospital. The Overall Group Leader must ensure that the party is covered by comprehensive insurance that covers all travel and all planned activities. It is recommended that pupils carry a note in the relevant foreign language in case they get lost to help re-unite them with the group. For exchange visits, appropriate safeguarding/child protection checks should be made on the host families, whether in the UK or abroad. New organisers of ski visits, overseas expeditions, or other complex overseas visits should obtain specific training and guidance from the LA before organising a visit.

School specific policy regarding overseas visits, in particular:

- **approval procedure?**
- **inspection visits?**
- **staffing levels/qualifications?**
- **emergency arrangements?**
- **insurance/repatriation?**

- **exchange visits – hosting – safeguarding/child protection checks?**
- **staff training for leaders of ski visits/overseas expeditions?**

12. Transport

As part of the overall risk assessment process, the Visit Organiser must take reasonable steps to check that any transport used during the visit is suitable, satisfactory, and acceptably safe, and that any specific Local Authority or legal requirements are met. Leaders should be familiar with, and comply with the Local Authority's "Driving at Work policy", Visits Guidance (see chapter 12), and generic risk assessments that give detailed recommendations for all standard forms of transport.

School specific policy regarding transport arrangements, in particular:

- **use of generic risk assessments?**
- **coach/bus/minibus/taxi hire?**
- **supervision/first aid/mobile phones?**
- **emergency arrangements – e.g. vehicle breakdown/accident on motorway?**
- **use of seat belts?**
- **use of booster seats?**
- **drop off arrangements?**

The school hires coaches/buses from:

- **Companies that have already been checked and approved by the Council's Transport Services team? and/or**
- **Companies whose safety management systems and operating procedures have been checked using the "Coach/minibus hire company enquiry EV3 form"?**

For the safe supervision of pupils on coaches/buses, group leaders are required to:

- **sit in various locations, spread throughout the coach?**
- **sit near emergency exits?**
- **carry a first aid kit and the school mobile phone?**

The Headteacher must ensure the safety of pupils travelling by private car, and should:

- risk assess and decide if the driver is suitably qualified, experienced and competent, and carry out suitable child protection/safeguarding checks, if appropriate;
- inform parents and obtain their written consent (this may not be possible in emergencies);
- gain assurance on main points of reference – insurance, licence, roadworthy, seatbelts, etc;
- ensure that drivers are aware of any specific requirements (e.g. compulsory use of seatbelts – individual school policies may require the use only of full 3-point seatbelts)
- ensure that drivers are aware of their responsibilities and school procedures (e.g. use of seat belts, keeping to speed limits etc).
- drivers have appropriate insurance – inc business cover for employees

For visits that require the use of staff cars, drivers must:

- have business insurance
- be assessed as competent and suitable by the headteacher (using the Driver validation form)

For visits that require the use of parents' or volunteers' cars. Drivers must:

- be assessed as competent and suitable by the headteacher/manager (using the Driver validation form)
- sign to say their car is roadworthy, taxed and insured
- be part of a recorded pool of drivers who have been assessed and approved (including child protection/safeguarding checks, if appropriate).

For visits involving the use of the students' own cars (if applicable):

Any private arrangements between pupils are not covered by school control, but if pupils are used as drivers on official school visits the same arrangements as above will apply for transporting pupils. However, by the nature of their age, these drivers will be inexperienced, and there is a significantly higher risk. The school will only use this option where the Headteachers has been assured of the suitability of the driver and vehicle. The parents of the passengers and of the driver must be fully informed and give their written consent.

Particular caution should be applied if a pupil (e.g. a sixth former) is the driver.

- **school policy?**

For visits involving the use of minibuses (if applicable):

The school follows National and Local Authority regulations and guidance, and all minibus drivers have been assessed and approved by the LA Transport Services (from Sept 2008, all new minibus drivers will

be required to successfully complete the MiDAS courses, and existing minibus drivers will be required to complete the MiDAS course at least once every 4 years).

School specific policy regarding use of minibuses, in particular:

- **minibus servicing and maintenance and reporting of concerns/ necessary repairs**
- **use of Section 19 bus permit**
- **authorisation of drivers – MiDAS – and renewal every 4 years**
- **annual health/medical checks**
- **driver hours**
- **number of drivers and staffing**

13. Parent/Guardian information and consent

The Overall Group Leader and EVC must ensure that parents/guardians are provided with appropriate and sufficient information about all visits. The amount of information and method of provision will depend upon the type of visit planned and the assessed level of risk involved. Parents/guardians of each pupil on a visit are asked to complete and sign a written consent form, whether it be an annual “rolling” consent for routine visits, or specific consent for a particular visit/activity. There is no legal requirement to obtain parental consent for visits/activities during normal school hours but it is nonetheless good practice to inform parents and seek consent for any activities that parents might be particularly concerned about.

Any special/medical needs of pupils are collated by....**Name.....** and supervising staff are briefed and trained accordingly. Parents are asked to give written consent to the administration of plasters and off-the-shelf first aid/medication, if deemed necessary. Medical information and consent forms can be obtained from **the school office/EVC/ LA’s “Guidance for the Management and Leadership of Offsite Visits”**??Parents should be clearly informed of the arrangements and responsibilities for collecting a pupil after a visit. The Visit Organiser/EVC must obtain parent contact details for all pupils on the visit.

School specific policy regarding parent information and consent, in particular:

- **informing parents - parent letters? newsletter? website? sports fixtures/regular events?**
- **informing parents - meetings? – when required (residential/overseas)?**
- **parental consent – blanket for year/school career/specific visit?**
- **gathering upto date information regarding special/medical needs?**
- **informing staff of medical/special needs - data protection?**
- **parental consent – medication inc.use of plasters and off-the-shelf medication?**
- **obtaining upto date parent contact details?**
- **informing parents of late returns to school or incidents on visits?**

14. Staff briefing and emergency procedures

It is important that all staff (including volunteers) involved in the leadership of a visit are fully briefed about each visit. Staff should be aware of their expected roles and responsibilities before, during and after a visit. Group leaders should be aware of emergency procedures and how to obtain outside assistance or contact the emergency services if required. Part of the planning for emergencies must involve the recording of one or more Emergency Home Contact(s) who should be available at any time during the visit. The Visit Organiser must ensure that group leaders have immediate access to the emergency contact details of the school managers and the parents of those on the visit. A properly equipped first aid kit is always available to staff during school visits and must be checked and taken on all visits. The school first aid kits are stored **in the school/EVC/Head’s office**??All staff should be made aware of the conduct and behaviour expected of them during the visit, particularly in regard to issues such as smoking and alcohol use.

School specific policy regarding staff briefing and emergency arrangements, in particular:

- **staff roles and responsibilities?**
- **emergency procedures/arrangements?**
- **emergency home contacts?**
- **school/personal mobile phones for staff?**
- **mobile phones for pupils – confiscate in emergencies?**
- **first aid equipment – how many? where stored? who is responsible for upkeep?**
- **staff conduct/behaviour?**

15. Briefing and preparation of young people

Providing relevant information and guidance to pupils is an important part of preparing for all school visits. Pupils should be briefed about safety arrangements and what clothing/equipment should be

brought. Leaders must ensure that pupils clearly understand what will be considered unacceptable behaviour or conduct, and the consequences of non-compliance. "Buddy systems" are an effective means of promoting safety and welfare within the group. During any time that remote supervision takes place the visit leader must ensure that pupils are aware of the supervision and emergency contact arrangements, and that they have the necessary skills, maturity, responsibility, knowledge and equipment to operate safely as an independent individual/group. Pupils should be briefed what to do in an emergency, or if they become separated from the rest of the group. It is good practice to teach pupils how to recognize dangers and manage risks sensibly.

School specific policy regarding the briefing and preparation of young people, in particular:

- **conduct and behaviour**
- **discipline and consequences of non-compliance**
- **use of mobile phones**
- **group safety – group leaders/buddy systems**
- **special/medical needs – data protection**
- **personal medication – storage/administration**
- **required uniform/identifying clothing – e.g. coloured hats/florescent jackets/school uniform**
- **remote supervision arrangements - training?**
- **emergency contact arrangements – e.g. ID /contact cards/mobile phones?**

16. Documentation (and visit records)

The ROVER database will store key elements of Category 3,4 and "A" visit details securely and indefinitely. Other visit details are **scanned and stored on the school computer?** Hard copies of other supporting documentation (e.g. risk assessments) are **stored and retained in the school's central "Educational Visits" file?** This information is stored until such time that the Headteacher decides that all issues/ incidents arising from the visit have been dealt with fully. If no significant incidents occurred during the visit, the school disposes of the paperwork **at the end of the academic year??** If a minor incident occurred during the visit, the school disposes of the paperwork **after a period of 6 years??** If a significant incident occurs during a visit that could be investigated at a later date, all relevant details are **retained until the young person becomes 21? Where?**

School specific policy regarding documentation and visit records, in particular:

- **how/where records of visits are stored? (e.g. CD?/filing cabinet?/ROVER?)**
- **how long records are kept? (depending upon if any incident)**
- **who makes decisions regarding storage/disposal of records?**

17. Visit Approval

Low risk day visits (Cat 1 and 2) are approved in-house by the Headteacher (with EVC guidance and support) using **the school's own paper form? /the Day Visit form provided by the LA? / ROVER Online?**

Day visits involving high-risk activities or environments (Cat 1A or 2A) are approved by EVC/ Governors/ Headteacher/ LA, using ROVER online.

UK and overseas residentials (Cat 3 and 4) including those involving high risk activities or environments (Cat 3A and 4A) are approved by EVC/Governors/Headteacher/LA using ROVER Online

The Visit Organiser must carefully check all visit forms before submitting for approval.

When required, Governor Approval for a visit is given by **the governor with specific responsibility for overseeing educational visits? /the Chair of Governors? /the Governing Body as a whole?**

The procedure for Governor Approval involves:

For low risk day visits (Cat 1 and 2) – **required? /not required?**

For high-risk day visits (Cat 1A and 2A) – **email (via ROVER online) to the governor with specific responsibility for overseeing educational visits? A hard copy of the visit form is given to and signed by the Chair of Governors? A hard copy of the visit form is shared with and agreed by governors at a governing body meeting?**

For residential/overseas visits (Cat 3 and 4) and those involving high-risk activities/environments (Cat 3A and 4A) - **email (via ROVER online) to the governor with specific responsibility for overseeing educational visits? A hard copy of the visit form is given to and signed by the Chair of Governors? A hard copy of the visit form is shared with and agreed by governors at a governing body meeting?**

18. Visit approval status and feedback

The procedure for Managers (Headteacher/EVC) to notify the Visit Organiser of approval decisions and to give feedback involves:

For low risk day visits (Cat 1 and 2) – ***school procedures? By email? By signed hard copy (with comments)?***

For high-risk day visits (Cat 1A and 2A) – an email is automatically generated via ROVER Online and sent to the visit organiser after the LA approval decision has been given. At any time, the visit organiser can access and view all approval decisions and any feedback given by accessing ROVER Online (see “View All Visits”)

For residential/overseas visits (Cat 3 and 4) and those involving high-risk activities/environments (Cat 3A and 4A) - an email is automatically generated via ROVER Online and sent to the visit organiser after the LA approval decision has been given. At any time, the visit organiser can access and view all approval decisions and any feedback given by accessing ROVER Online (see “View All Visits”)

If a visit is not approved or only given “Outline Approval” by a manager, they must give reasons for their decision and state clearly any changes that would be necessary

If a visit does not obtain the correct level of approval, it may not be covered by LA insurance and support.

19. Amendments to visits

If there are significant late changes to visit plans that have already been approved or submitted for approval, the Visit Organiser must notify all relevant approving authorities (EVC/Headteacher/ Governors/ Local Authority) of these changes, and ensure that their additional consent is given. There should be a clear system for the notification and approval of amendments to visit plans, so that there can be no misunderstanding or confusion by any parties involved.

For low risk day visits (Cat 1 and 2) – ***school procedures? By email? By notifying in writing to EVC/Headteacher?***

For all Cat 3/4/A visits recorded on ROVER, there is a clear procedure for recording minor amendments that do not need further approval in 19.1 “Late Minor amendments”. For significant amendments that require further consideration and approval, the ROVER system requires visit organisers to access section 19 (by clicking “Amend” in right hand column of visit summary in “View All Visits”) and superceding the original submitted form by clicking on 19.2 “Significant Amendments” to create an unlocked version of the form that will need resubmitting after the amendments have been completed.

20. Post visit review and evaluation

It is good practice for Visit Organisers, on return from a visit, to review the visit with the EVC and/or Headteacher and, where appropriate, to record any examples of good practice and lessons learned that might assist with the planning and leadership of future visits. In particular, it is important to record and review any accidents, incidents, or near-misses (i.e. dangerous incidents that nearly happened, but fortunately didn't). It is important that details are recorded as soon as possible after an incident whilst they are still fresh in the memory, preferably with signed witness accounts. Visit Organisers should take ***copies of the Accident Incident FORM (AIF) and the Accident Incident Investigation Form(AIIF)***. Accidents, incidents, or dangerous occurrences must be recorded and reported in accordance with the Council's accident and incident reporting procedures (***information can be obtained from the office? / from the EVC? / from the Headteacher? / from the LA Safety Services?***).

Post-visit reviews and evaluations should be recorded and stored ***on ROVER in section 20 ? /using the downloadable form (VGA 20.1) in the LA's “Guidance for the Management and Leadership of Offsite Visits” / using the school's own form available from the office/EVC?***

Post visit reviews and accident/near misses records are reviewed ***regularly? /termly? /annually? by the Headteacher? / and EVC? And Governors?*** Any lessons learned are shared with all relevant staff, and any necessary changes to procedures made.

After any major accident, the school will undertake a review of the incident and their emergency procedures, and will share the findings with the Local Authority for the benefit of other schools. Staff are encouraged to express any concerns regarding the organisation and management of visits in writing to the Headteacher, and these will taken seriously and dealt with in confidence. If necessary, issues will be considered further by the Governing Body. Significant incidents and issues of concern should also be brought immediately to the attention of the LA Educational Visits Officer and Safety Services.

This policy has been reviewed and revised by:

<i>Name</i>	<i>Position</i>	<i>Signature</i>	<i>Date</i>
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This policy has been agreed by:

<i>Name</i>	<i>Position</i>	<i>Signature</i>	<i>Date</i>
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