HCAT

Educational Visits Policy

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HCAT Educational Visits Policy

1. Introduction

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

2. Aims and Objectives

The Trust aims to ensure that all pupils within the Trust experience a broad and balanced curriculum that builds cultural capital and promotes their spiritual, moral, cultural, mental, and physical development, preparing them well for adult life. The Trust recognises the value and importance of learning outside the classroom and encourage all academies across the Trust to organise educational visits that enrich the curriculum and enhance the learning and development of our pupils.

3. Compliance

This Trust policy has been designed in line with the Department for Education and HSE guidance. This policy should be read in conjunction with relevant academy policies e.g.:

- Health and Safety Policy
- Charging and Remissions Policy
- Safeguarding and Child Protection Policy
- Critical Incident Policy
- Equal Opportunities Policy

4. Access to Policies and Guidelines

Staff involved in the leadership and management of visits should be familiar with all relevant guidelines and policy documents.

5. Roles and Responsibilities

5.1 The Head of School/Principal

The Head of School/Principal has overall responsibility for all the academy’s educational visits. New/Acting Heads should access training as soon as possible during their first term in post regarding their responsibilities with respect to the management and approval of educational visits.

If the Head of School/Principal is absent or unavailable, their assistant or designated member of the Leadership Team will fulfil the same responsibilities regarding the management and approval of educational visits.

5.2 The Educational Visits Coordinator (EVC)

Each school/college within the Trust must appoint an EVC. The EVC will oversee the planning and organisation of academy visits and provide advice and guidance to staff and the Head of School/Principal, regarding the approval of visits.

New EVC’s should access training during their first term in post regarding their responsibilities with respect to the management and approval of educational visits and should attend regular refresher/update training.

5.3 The Educational Visits Officer (EVO)

The Trust has appointed David Armstrong as the Educational Visits Officer for all schools within the Trust.

6. Advice and Guidance

Staff should seek advice and guidance regarding educational visits from:

- the Educational Visits Coordinator
- the Head of School/Principal
- the School Business Manager (SBM)
- the Educational Visits Officer
- other experts with specialist/local knowledge

7. Training

Teachers and support staff will receive training on educational visits and school trips prior to running their first trip. Teachers and support staff will receive regular and ongoing training as part of their professional development. Educational Visits Coordinators will receive specific training to undertake their job role.

8. Monitoring

To ensure the high quality of standards on educational visits, the Head of School/Principal and/or the Educational Visits Coordinator will normally accompany at least one visit per year to monitor real time practice, the systems in place and to assist with the review of policies and procedures.

9. Planning and Approval Procedures

Visits should be recorded, checked, and approved in accordance with the following procedures. For visits, "outline approval" should be obtained, in conjunction with the EVC/Office Manager/SBM as appropriate, before bookings are made and confirmed.

If any visits involve what may be regarded as "high risk activities or environments" they **MUST** be given an additional subcategory "A" classification (see section 9.5).

9.1 Category 1 – Day Visits (Routine)

These are local visits that take place frequently or regularly throughout the year, or over a specific period (e.g., a series of six weekly visits) e.g. visits to local library/swimming pool/away sporting fixtures.

- Category 1 visits should be recorded using the in-house diary request form.
- Category 1 visits should be checked and approved internally by the Headteacher (with EVC support)

9.2. Category 2 – Day Visits (Non-Routine)

These are one-off or occasional visits e.g. day visit to Alton Towers/Scarborough Sea Life Centre.

- Category 2 visits should be recorded using EVOLVE online (see EVC to request username/password).
- Category 2 visits should be checked and approved internally, by the Head of school/Principal.
- Category 2 visits should be submitted for approval at least 8 weeks in advance of the first visit.

9.3. Category 3 – UK Residential Visits

These are visits that involve one or more nights away from home in the UK.

- Category 3 visits should be recorded using EVOLVE Online (see EVC to request username/password)
- Category 3 visits should be checked and approved internally by the Head of School/Principal (with EVC support), and externally – by the Educational Visits Officer.
- Category 3 visits should be submitted for approval at least 10 weeks in advance of the first day of the visit.

9.4. Category 4 – Overseas Visits

These are residential or day visits to any place outside England/Scotland/Wales.

• Category 4 visits should be recorded using EVOLVE Online (see EVC to request username/password).
• Category 4 visits should be checked and approved internally by the Head of School/Principal (with EVC support) and externally by the Educational Visits Officer.
• Category 4 visits should be submitted for approval at least 26 weeks in advance of the first day of the visit.

9.5. 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 of happening) than might normally be encountered in everyday or academy life should be coded as a category A visit e.g. a weekly climbing day visit (1A), a day visit to dry ski slope (2A), a residential stay at an outdoor centre (3A), an overseas trekking expedition (4A) and any trip near or involving water.

• All sub-category "A" visits should be recorded using EVOLVE Online (see EVC to request username/password).
• All sub-category "A" visits should be checked and approved internally - by the Head of School/Principal (with EVC support), and externally – by the Educational Visits Officer.
• All sub-category "A" visits should be submitted for approval at least 10 weeks in advance for a visit in the UK or, 26 weeks in advance for a trip abroad.

10. Staff Leading Visits

All staff who lead visits are required to have their own EVOLVE username and password and to input their own information and assurances on EVOLVE Online. Staff can request their own EVOLVE username/passwords by asking the EVC.

11. Visit Objectives

All educational visits should have a defined purpose, with clearly stated, justifiable educational objectives, or else they may not be approved.

12. Pupil Selection

Every effort should be made to ensure that trips and visits are available and accessible to all pupils who wish to participate, irrespective of special educational or medical needs, ethnic origin, gender or religion. The selection process for a trip will be outlined in the parental consent letter. For trips that could potentially become oversubscribed, a lottery system may be required.

13. The Trip Leader

Trip leaders must have been assessed and approved as suitable and competent to fulfil their role and responsibilities by the Head of School/Principal. Trip leaders should normally have been an assistant or deputy leader on a similar visit prior to becoming a trip leader.

Heads of School/Principals might require trip leaders of more complex, specialist and/or demanding visits (e.g. ski visits or overseas expeditions) to have much broader leadership experience.

14. Deputy, Assistant and Volunteer Leaders

Visits normally require a deputy leader who can deputise for and take full responsibility in the absence of the trip leader, as necessary. Deputy and assistant leaders should be carefully chosen and must be assessed and approved as suitable and competent to fulfil their roles and responsibilities by the Head of School/Principal and trip leader.

Each school/college has a responsibility to ensure that all adults involved in the supervision of children during academy-related (regulated) activities are suitable people to work with children and pose no threat to the pupils in their care. Concerns about possible child abuse and/or poor practice by a member of staff, volunteer or other adult should be reported to the trip leader and Head of School/Principal immediately (in line with the HCAT

Safeguarding Policy and Keeping Children Safe in Education guidance).

15. Staffing Selection and Supervision Ratios

Effective supervision is of the utmost importance in maintaining the safety and welfare of pupils on educational trips and visits. The choice of staff and the decision regarding ratios is still a matter of judgement for the Head of School/Principal, after consultation with the EVC and trip leader (and the Education 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. 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.

15.1. Minimum Staff to Pupil Ratios

These ratios are minimum requirements, and the visit leader needs to assess the nature of the trip to establish if ratios need to be increased due to the high-risk nature of a visit, or the age of the children and the activity being undertaken:

- 1 adult for every 6 pupils in school Year 1 to 3 (under 5s reception classes should have a higher ratio).
- 1 adult for every 10 – 15 pupils in school Years 4 to 6.
- 1 adult for every 15 – 20 pupils in school Year 7 onwards.
- Abroad, residential, or high risk: 1 adult for every 10 pupils.

These ratios are minimum requirements and may be adjusted based on the specific circumstances and risks associated with each educational visit.

16. First Aid

Pupils on educational visits should always have ready access to a competent adult who has an appropriate level of first aid training. This normally requires at least one of the trip leaders to have an appropriate and current first aid qualification. An evaluation will be made prior to the trip on the level of first aid training required of the staff attending the trip. This will be based on the medical needs of the pupils, potential risks and the first aid facilities available at the location.

17. Selection and Suitability of Accommodation or Venues to be Visited

As part of the overall risk assessment process, the trip 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 information packs that provide all reasonable assurances regarding standards expected on the visit. If necessary, an assurance form can be sent to the manager of a place of accommodation or venue to be visited, requesting signed and written assurances regarding their safety management systems and operating procedures. When planning a visit, the trip leader should, wherever possible, undertake an exploratory visit to inspect and familiarise themselves with the accommodation to be used and venues to be visited

18. High Risk Activities and Environments

Leaders who organise visits that involve high-risk activities and environments (sub-category A) must be aware that such visits normally require a greater degree of planning and preparation by virtue of their complexity and unpredictability. Leaders and other supervisors must be sufficiently competent to supervise pupils during the activity and in the specific 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. Evidence of competence should be recorded on Evolve as part of the risk Assessment process.

Trip leaders 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 arrangements. The EVC will sometimes ask to see and check these plans.

19. Risk Assessments and Management

The Trust has a legal duty of care for its pupils and must therefore any potential hazards involving the activity/specific location must be assessed during an educational visit, and the trip leader should ensure that risks are managed to a reasonable and acceptable level. Every visit must therefore be subject to a suitable and sufficient risk assessment that identifies all significant hazards and any contingency plans for alternative activities.

The trip leader should undertake an appropriate and individual risk assessment for each visit, and this should be shared with, discussed and agreed by all trip leaders (including new leaders and volunteers) before the visit takes place.

The process of risk assessment should be a positive means of raising awareness of hazards and prompting constructive discussion regarding the best means of managing the risk – it should therefore be of a real and practical value to the leaders and group members, not just a paper exercise. A set of written generic risk assessment templates are available in the resources section of EVOLVE Online, however, these should be personalised to the individual circumstance of the trip and not just accepted as a risk assessment having been completed.

Trip leaders should select the generic risk assessment template appropriate to the category of the visit they are leading (this should be just one template, unless the trip is overseas). Trip leaders should complete the required sections of the template, paying particular attention to the bottom section of the template regarding identifying any significant hazards specific to the visit, that are not already covered in the generic sections of the template (e.g. where you are going, activities you will be doing and members of the group).

Trip leaders should consider the control measures that need to be put in place to reduce the potential risks posed by the places, activities and individuals that are involved in the trip (this does not include activities being run by an independent provider as they will have their own risk assessments in place), reducing them to an acceptable level.

The Outdoor Education Advisers' Panel – National Guidance has advice and guidance on specific types of visits, activities and potential hazards that can assist in completing the template
https://oeapng.info/downloads/specialistactivities-and-visits/

The amended risk assessment template will need to be signed by the member of staff who completed it, this can be done as an e-signature at the bottom of the form. The risk assessment should be shared with the other leaders on the visit. Completed assessments are approved by the EVC and a designated member of the school/college leadership team.

20. Insurance

The RPA provides insurance for all schools within the Trust. Trip leaders should check with School Business Managers, prior to submitting a trip request form if they are concerned that an activity would not be covered under the RPA insurance arrangements.

21. Financial Arrangements

The financial procedures outlined in the Trust's Charging and Remissions Policy will always be followed when arranging trips. Money for trips must always be paid to the school/college and under no circumstances should money be processed through personal accounts.

Trip leaders should work with School Business Managers and the Finance Department to ensure that:

• each visit is accurately costed and budgeted for.
• adequate allowances are made for additional unforeseen costs and changes in the circumstances.
• financial plans, especially for more complex and committing visits, are checked over and agreed first by the School Business Manager or Finance Department before financial commitments are made.
• for visits that involve substantial commitment financially (e.g. overseas expeditions), no firm bookings or financial commitments should be made until the visit has been agreed and received "Outline Approval" from the relevant authorities.
• the costs of the visit are made clear to all concerned including any financial contribution from academy funds, and how much each parent will be charged or asked to contribute.

22. Cancellations and Refunds

If the trip is cancelled due to unforeseeable circumstances, it is at the Head of School/Principal's discretion as to whether a refund is given to parents, considering the cost to the school and including alternative provision costs.

If a pupil or parent cancels their place on a trip, it is at the Head of School/Principal's discretion as to whether a refund is given to parents. The Head of School/Principal's will consider the pupil's circumstances for cancelling their place, whether the school/college will be reimbursed for the pupil's place on the trip and whether the space on the trip can be offered to someone else. No refund will be issued until the trip has returned.

Where a pupil has previously cancelled a place on a trip, and received a full refund, the school/college has the right to refuse to allow the pupil to attend future trips and visits (subject to consideration of the circumstances of the original cancellation).

Any charge made in respect of pupils will not exceed the actual cost of providing the trip, divided equally by the number of pupils participating.

Once trip arrangements are booked and confirmed and if contributions to a trip exceed the total cost of the trip, a refund will be given where the excess is greater than £5 per child. Refunds will not be given if the trip is cancelled due to unforeseen circumstance.

23. Overseas Visits

All overseas visits (Category 4) require EVO approval as well as in-school/college 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 and before parents or the school/college make financial commitments. It is good practice, wherever possible, for the trip leader to make an exploratory visit to a location. If this is not reasonably practicable, then the trip leader should gather sufficient appropriate and/or additional information and assurances (via website/teacher pack) about the location and facilities offered. The level of staffing required for overseas visits should reflect not only the direct supervision needs, but also the contingency plans made for managing emergency situations. It is not uncommon for a member of staff to need to return home early or to accompany a group member to hospital.

It is recommended that pupils carry a card in the relevant foreign language, with a contact number for the trip leaders, in case they get lost to help re-unite them with the group. For exchange visits, appropriate safeguarding/child protection checks should 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 EVO before organising and supervising a visit.

Foreign Office advice will be followed regarding all trips abroad.

24. Transport

As part of the overall risk assessment process, the trip leader must take reasonable steps to check that any transport used during the visit is suitable, satisfactory, and acceptably safe, and that any specific legal requirements are met. Trip leaders should be familiar with and comply with the generic risk assessment template that gives detailed recommendations for all standard forms of transport.

24.1 Coach Transport

The Trust hires coaches/buses from companies whose safety management systems and operating procedures have been checked. The EVC will be able to advise staff regarding this.

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

- sit in various locations, spread throughout the coach.
- where possible, sit near emergency exits.
- ensure that there is a first aid kit available.
- ensure pupils wear seatbelts.
- in the event of a breakdown, follow the highway code and carry out a dynamic risk assessment to ensure that pupils are safe.

24.2 Private Transport

The Head of School/Principal must ensure the safety of pupils travelling by private car (taxi), and should:

- risk assess and decide if the driver is suitably qualified, experienced and competent and child protection/safeguarding checks are completed, if appropriate.
- ensure that drivers using a private car, complete a Driver's Declaration Form.
- inform parents and obtain their written consent (this may not be possible in emergencies).
- gain assurance on main points of reference – insurance, license, roadworthy, seatbelts, etc.
- ensure that drivers are aware of any specific requirements e.g. SEN pupil needs.
- ensure that drivers are aware of their responsibilities and Trust procedures (e.g. use of seat belts, keeping speeding limits etc.).
- make staff aware that trust occasional business use policy is in place for the occasional use of private transport.

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

- have business insurance, if they regularly transport pupils using private transport.
- be assessed as competent and suitable by the Head of School/Principal (using the driver declaration form)

25. Parent/Carer Information and Consent

The trip leader and EVC must ensure that parents/carers 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/carers of each pupil on a visit are asked to complete and sign a written consent form, whether it be an annual 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 academy hours, but it is good practice to inform parents and seek their consent.

Any special/medical needs of pupils are collated by the EVC, SENDCo, First Aider and the Trip Leader and supervising staff are briefed and trained accordingly. Parents should be clearly informed of the arrangements and responsibilities for collecting a pupil after a visit. The trip leader/EVC must obtain parent contact details for all pupils on the visit.

26. 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. Trip 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 possible emergencies must involve the recording of one or more emergency home contact(s) who should be available at any time during the visit. The trip leader must ensure that supervising members of staff have immediate access to the emergency contact details of the academy managers and the parents of those on the visit. A properly equipped first aid kit must always be available to staff during visits and these must be checked prior to the trip commencing to ensure all relevant equipment is available and that all products are in date.

All staff should be made aware of the conduct and behaviour expected of them during the visit, particularly on issues such as smoking and alcohol use.

27. Briefing and Preparation of Pupils

Providing relevant information and guidance to pupils is an important part of preparing for all school/college visits. Pupils should be briefed about safety arrangements and what clothing/equipment should be taken on the trip. Trip leaders must ensure that pupils clearly understand what will be considered unacceptable behaviour or conduct, and the consequences of non-compliance.

During any time that remote supervision takes place the trip leader must ensure that pupils are aware of specific supervision and emergency contact arrangements, and that they have the necessary skills, maturity, responsibility, knowledge and equipment to operate safely as an independent individual. 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 recognise dangers and manage risks sensibly. For trips abroad with large groups, it useful for pupils to have a brightly coloured hoodie, t-shirt or cap so that they are easily identifiable. Pupils should also carry an emergency contact card. Failing to follow the behaviour expectations on a trip or visit will result in behaviour sanctions being applied when pupils return to the school/college. In addition, pupils may be prohibited from attending future trips or visits.

28. Documentation (and visit records)

The EVOLVE database will store key elements of Category 3, 4 and “A” visit details securely and for an indefinite period. Other visit details are stored on the staff shared area. This information is stored until such time that the Head of School/Principal decides that all issues/incidents arising from the visit have been dealt with fully. If no significant incidents occurred during the visit, the school/college can dispose of the paperwork at the end of the academic year.

If an incident occurred during the visit, paperwork should be stored in line with GDPR requirements.

29. Visit Approval Arrangements

All trips and visits classed at Category 2 and above and any sub-category A trips must be approved in advance using the trip request form. This should be e-mailed in advance to the EVC. The EVC will confirm when/if the trip is approved.

Category 1 visits should be approved through a diary request form.

Following Headteacher approval, Category 4 Trips should be emailed to the CFOO, by SBMs. The CFOO will

keep a log of category 4 trips.

30. Visit Approval Status and Feedback

Trips must not go ahead without the necessary approval.

• Category 1 and 2 trips - approval via e-mail.

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

31. Amendments to Visits

If there are significant late changes to visit plans that have already been approved or submitted for approval, the trip leader must notify all relevant approving authorities 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 all Cat 3/4/A visits recorded on EVOLVE, there is a clear procedure for recording minor amendments that do not need further approval in the notes section at the end of the form. For significant amendments that require further consideration and approval, the EVOLVE system requires trip leaders to contact the person who the form is with and request that the form is returned for amendments, the form will then need resubmitting after the amendments have been completed.

32. Post Visit Review and Evaluation

It is good practice for trip leaders, on return from a visit, to review the visit with the EVC and, where appropriate, to record any examples of good practice and lessons learned that might assist with the planning and leadership of future visits. It is important to record and review any accidents, incidents, or near-misses (i.e. dangerous incidents that nearly happened, but fortunately did not). 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. Trip leaders should meet with the EVC to record any incidents and outcomes of accidents or near misses.

After any major accident, the academy will undertake a review of the incident and their emergency procedures and will share the findings with the Trust for the benefit of others within the Trust. Staff are encouraged to express any concerns regarding the organisation and management of visits in writing to the Head of School/Principal, and these will be taken seriously and dealt with in confidence. Significant incidents and issues of concern should also be brought immediately to the attention of the EVO.