



THE MOUNTBATTEN SCHOOL

School Improvement Committee

Trip Policy

June 2020

Review Date: July 2022

Company No. 07560175

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Objective

The objective of this policy is to ensure that all trips and excursions taking place off site are fully documented and agreed, that funds are fully accounted for and that a clear audit trail exists for all monies collected.

School visits are part of the broad balance of curriculum and learning arrangements of the school, opportunity is frequently taken to enrich and enhance this through outdoor learning, outdoor education and educational visits. These opportunities help students to develop key skills, boost self-confidence and motivation, develop social education and citizenship and promote health, fitness and the positive use of leisure time.

The school's policy and procedures are formulated in conjunction with the **advice, guidance and training** provided by the Hampshire County Council Outdoor Education, PE and Sport Service and their documentation and guidance.

This policy will enable the school to make Governors aware of all trips taking place in the academic year. It will allow us to meet our obligations of notifying and seeking approval from Hampshire LA.

Procedure

1. Planning and Calendar

All teachers (where possible) should advise the member of SLT with responsibility for the Calendar by 1 June of each year of all trips planned for the following academic year. This must include **ALL** activities where students will be taken off site. ***Complete the Request for school event/activity form***. This does not apply to regular academic trips such as swimming, sports activities against other schools or timetabled PE lessons where students are taken off site. However, these activities will need to be communicated a month in advance so that parents can be notified and must go on the Parent Portal noticeboard indicating the time students will return to school.

Notification of activities must include:

- The location of the event
- The nature of the event and learning outcome
- The dates and times
- Year group/s involved
- Approximate total cost of the event
- Proposed staff to accompany the event
- Numbers of students likely to attend
- Names of any other adults or non-school children to attend

2. School Activity Planning and Organisation

Risk and benefit assessment – As part of planning off-site activity you should undertake:

- an analysis of the educational benefits of the activity translated into clear objectives and expectations;
- an assessment of the risk of harm and its likelihood is made, followed by putting clear control measures in place so that they can be satisfactorily managed;
- a pre-visit, wherever possible, to inspect the location and its ability to realise the benefits and be managed. Very well-known and used sites may be checked by contacting key personnel prior to re-visiting and web-based information is increasingly available and useful.

Apply for approval using the online EVOLVE System (for residential and hazardous trips this should be completed 8 weeks prior to the visit); ensure you complete the correct activity boxes and upload relevant documentation e.g. risk assessment and letters to parents.

The Group Leader needs to seek approval from the Education Visits Coordinator who will inform the Executive Headteacher and a governor.

Summary of approval procedure shown in Appendix 2

For residential trips is the responsibility of the Group Leader to arrange emergency contacts, these must be one member of SLT and another SLT approved member of staff.

If your trip is abroad

- Identify the tour operators that can accommodate your requirements and ask for quotes. Ensure the quotes cover all your travel needs from the school. Think about best value -3 competitive quotes.

If your trip is UK based

- Identify the means of travel and arrange quotes. Think about best value (3 competitive quotes).
- Tickets must always be purchased through reputable agencies (approved by HCC) with all payments made via the school system on production of an invoice.
- For all trips the full cost must be broken down to ensure all costs are recovered. Travel and accommodation are the main areas of cost but you must also be aware of the school charging policy and consider the cost of:
 - Photocopying
 - Films and development
 - Food and Drink for any meetings you are planning
 - Cover costs if you are away in term time (costed at £75 per teacher per day)
 - Currency Exchange
 - Any additional insurance for personal or school equipment (check with the LEA insurers what cover is needed)
 - Non-refundable deposits that may be lost
 - **Inspection tour by a member of staff prior to the visit**
 - A contingency of £5 per student that will be refundable if not used.
 - **£5 Admin charge per student.**

NB: No additional payment will be made to part time staff attending a visit. If staff would like their own children to attend a visit - this must be agreed by the Group Leader and the Executive Headteacher prior to the deadline for deposit payments. The children of staff are subject to the full visit cost.

Check the final calculation for the cost of the visit with the Finance Department so that they can raise an order. Staff must not apply or make any commitment to a visit until an order is with the Finance Department. Complete the 'Request for School Event/Activity Form' (forms available in the staff room) to seek approval from SLT and Calendar group, allow at least 2 weeks for this.

Once the true cost of the trip has been established a letter to parents should be sent seeking commitment for the trip. All letters home to parents **MUST** be typed by the Admin Services Team and approved by SLT prior to being sent home (the Admin Services Team will ask for approval of the letter from SLT). Please note that letters are emailed to parents via In-Touch, by the Admin Services team.

The Finance Department **MUST** be informed 24 hours prior to the letter being sent, as the trip will need to be available for parents to pay online.

The letter should include a provisional itinerary. Parents should be advised that if the student subsequently drops out money already paid is not refundable unless a replacement student is found. For the more expensive trips a year's notice would be reasonable. The letter must also explain that poor behaviour at school could lead to the student being refused permission to attend **and how students will be selected if the visit is oversubscribed.**

If the visit is oversubscribed the selection should be made using the following criteria:

- Behaviour of students using HOY, SLT and SIMS log – students with poor behaviour will not attend
- Money owed to school from other activities – students will not be eligible until all owed money is paid
- The number of other residential activities that students have already attended – priority will be given to those who have attended fewest
- Names out of a hat – this will be the final selection point
- The letter must be clear at what point, payments will be required, and include information about cancellation and refunds. You should also be aware of when the school will have to pay deposits and the final invoice to the travel company, and how this fits with the staged payments from parents – the final payment for parents must be one month prior to the final invoice from the travel company.
- A full list of everyone attending (students, staff, other adult helpers and children who are not students) should be completed as soon as it is clear who you would like to attend. Submit a list of students to be taken out and seek approval from SLT & HoY, who have the right to refuse permission for anyone to attend visits.
- Adults attending visits, who are not members of staff, must be DBS checked if they are attending a residential visit or are to be in a supervisor role.
- Payments can be made via the school's online payment system. Students paying by cash or cheque should be issued with a payment card and payments should be made to the school through the Finance Department. The Finance Department will record the payment in the office and on the students' payment card
- The school's finance officer is responsible for banking all money and responding to all invoices and will keep a record of this for each visit
- The visit leader must keep an up to date financial breakdown of all costs including all monies collected, invoices and receipts of what has been paid for
- All foreign currency must be booked through the Finance Officer. Please give sufficient notice.
- Identify how student spending money will be handled and converted
- The Hampshire Educational Visit Information and Consent Form must be sent to parents (this includes contact names and numbers, medical information and consent for taking images). The completed declarations must be fully completed and filed with other trip paperwork

- Carry out a risk assessment for the visit. If the trip has an element of risk, boating, climbing, swimming etc. the venue should be asked to forward a copy of their risk analysis. This analysis will be required by SLT when approving the event. Check the requirements in the Hampshire Off-Site Activities and Educational Visits file, a copy of which is on the Portal and in the Business Manager's office.

Arrange information for students attending, and their parents. This could be a booklet or Parents' Evening. This should include all details of transport, accommodation (full address and telephone number), names of group leader and staff, emergency contact arrangements, a visit itinerary, insurance cover, code of conduct, advice on spending money, advice on what to take and what not to take, including prohibited items.

- A full list of contact names and numbers must be drawn up to ensure that in case of emergency, contact can be made with the party no matter where you are
- Ensure that all documentation is in order well before your trip i.e. passports, visas, insurance documents, currency etc.
- Consider first aid requirements (LEA recommend that all group leaders are first aid trained). Ensure the visit has a fully stocked first aid kit.

3. Educational Visit Coordinator's check of all visits

At least 4 weeks prior to the visit meet with Education Visits Coordinator the school's educational visits coordinator. Carry out the Group leaders planning and managing visits checklist prior to the meeting.

4. Emergency Arrangements

1 week before the visit, arrange for a copy of the group list, including everyone attending (students, staff, other adult helpers and children who are not students), medical forms, contact numbers and all emergency procedures to be given to Education Visits Coordinator and the Head Teacher.

Group Leaders must carry a copy of the LA emergency arrangements and base contact details at all times on the visit. Please use the school accident form (appendix 3), in conjunction with the LA procedures.

Day trips – The lead teacher must have a copy of the group list, including everyone attending (students, staff, other adult helpers and children who are not students), medical information contact numbers, the day trip risk assessment and all emergency procedures. On the day of the visit the student list must be updated.

An accurate list of all staff and students off site must be left in the school office along with a contact telephone number for the lead member of staff.

5. Record keeping

Financial details of residential trips should be retained for three years for auditing purposes.

All forms relating to students who cancelled or had other problems should be retained for the full academic year following the trip.

Roles and Responsibilities

A full list of the roles and responsibilities of the Governors, Head teacher, EVC, Group Leader and other staff on a visit can be found in the LA Off-site activities and educational visits regulations and guidance.

The Group Leader is responsible for selecting an appropriate balanced team of staff/adult helpers for the visit. Approval to take teaching staff and support staff on a visit must be agreed by Senior DHT and EVC/School Business Manager.

The Group Leader is responsible for ensuring that all staff and adult helpers on a visit act in the same way as a careful parent ‘in loco parentis’. With particular reference to the consumption of alcohol – one member of staff must be ‘in charge’ and this person must not drink any alcohol. Others must only drink in moderation as at any time they may be called upon to deal with an emergency which may require them, for example, to drive a vehicle.

6. Publicity

Following the visit, a short report with a suitable photograph should be submitted to the Publicity Officer. This may be sent to the local paper so please ensure that any student shown has an image consent form.

Appendix 1 - Supervision ratios and qualifications guidance

Activity	Qualifications/Staffing	Maximum Ratios	Notes
Local visits – in the local area, close to support at the base	<ul style="list-style-type: none"> an experienced group leader (recommended) other qualified leader(s) (numbers as required) other responsible adult(s) in support a minimum of two leaders required, unless exceptional circumstances are agreed 	8-under 18 1 per activity or supervision group (maximum 1:20)	<p>A minimum of one qualified leader is needed for every group or class.</p> <p>They can then be supported by other qualified leaders or responsible adults. Minimum ratios are not recommended ratios. Small working groups of 6-12 remain the target.</p>
Day visits – more than 60 miles or one hour from base	<ul style="list-style-type: none"> an experienced group leader (recommended) other qualified leader(s) (numbers as required) other responsible adult(s) in support a minimum of two leaders required 	8-under 18 1 per activity or supervision group (maximum 1:12)	<p>Leaders should reflect the gender of the group.</p> <p>It is recommended that any off-site visit should include at least one certificated Outdoor Leader trained member of staff where possible.</p>
Residential visit, UK or abroad	<ul style="list-style-type: none"> an experienced group leader (recommended) other qualified leader(s) (numbers as required) other responsible adult(s) in support a minimum of two leaders required 	8-under 18 1 per activity or supervision group (maximum 1:12) These ratios do not include the centre/	<p>As above however it is recommended that the ratio of qualified staff to responsible adult support is low, at 1:1 or 1:2.</p> <p>It is strongly</p>

	<ul style="list-style-type: none"> large or complex visits must have an experienced leader 	residential base staff NB Visits during term time teaching staff supporting trips will be 1:20 allowed ratio 1:20, other staff	recommended that all residential visits should include at least one certificated Outdoor Leader amongst the supervisory staff group. Leaders should reflect the gender of the group.
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Appendix 2 – Activities and Use of Evolve

Outdoor Education, PE and D of E Service - Information note Guidance for placing visits onto EVOLVE

This note has been prepared to try and help clarify those types of visits that MUST use EVOLVE for management and authorisation, and those which may not necessarily be required to be placed on EVOLVE

EVOLVE is the web based off site and outdoor visits management system, which covers authorisation and approvals for all off site visits for schools across West Berkshire, Hampshire, Southampton, Portsmouth and the Isle of Wight.

EVOLVE allows schools to fully risk manage all their out of school activities and visits, ensuring that staff and the school itself are fully supported all times during the visit. It does this by ensuring, as far as reasonably possible, that all national, employer and establishment requirements are in place before a visit takes place. It also provides a record of the visit should assistance be required during the visit, or a future challenge from parents or others require us to defend against any allegations arising from incidents.

It is **Best Practice** for all off site visits to be placed onto EVOLVE, and we would encourage schools to do so if possible. However, it is appreciated that there are many frequent, local and very low risk activities that take place during planned school curriculum time that may not necessarily require recording on EVOLVE.

Types off visit or activity:

- All visits involving Adventure Activities, Residential Activities, visits abroad, and self-led fieldwork or activities in rural environments containing significant natural hazards (Open Country – e.g. coastlines, cliff lines, rivers, canals, other significant water bodies and steep ground).

These require Local Authority / Employer Approval and must be managed via EVOLVE

- Bespoke, infrequent or irregular local visits within walking distance to locations (museums, galleries) that are not essentially hazardous in their own right. Similar visits to locations at distance from school (e.g. London museums, etc.).

These require School (Head Teacher) Approval, and must be managed via EVOLVE.

- Frequent off site visits to very local areas (e.g. weekly or monthly church/mosque visits for worship, visits to other local schools for partnership learning, the use of immediate local woodlands, visits to parts of the local community, sports fixtures. swimming lessons etc.)

which have a very clear and stated curriculum focus, i.e. they are part and parcel of a normal school day and part of whole school planning.

These require Head teacher sign off as part of the schools planning process, but do not have to be managed via EVOLVE.

However, such visits must be guided by and adhere to employer and establishment policies for off-site learning and visits, with respect to ratios, staff competences, etc. and ensuring that appropriate information concerning the visit should be held in school (e.g.: class lists, staff names and contact numbers, generic parental consent, etc.). Schools must know who is off site, when, and be able to make contact and provide support at all times.

If in doubt, we would strongly advise that all visits should be recorded on EVOLVE if possible.

If you have any queries, please contact the Outdoor Education, PE and D of E office for advice.

01962 876218 outdoor.education@hants.gov.uk

Stuart Nundy

Head of Service: Outdoor Education, PE and D of E Service

Review of this policy by: Governors School Improvement Committee

Signed by:

Date: 2019

Chair of Governors' School Improvement Committee

Signed by:

Date: 2019

Chair of Governors

Appendix 3 - School Accident Form (SAF)

Please use this form in conjunction with the LA Evolve reporting system.

The Mountbatten School Accident Form

1. Who had the accident? Mark only one oval.

- Staff
- Student
- Visitor
- Community User

2. Name

3. Tutor Group (Student only)

4. Telephone Number (Visitor or Community User only)

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5. Did the accident happen off-site? Mark only one oval.

- Yes
- No

6. Location of Accident

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7. Time of accident and Date of Accident

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8. What injury was sustained?

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9. How did the accident happen?

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10. Was an ambulance called? Mark only one oval.

- Yes
- No

11. Was the injured party taken to hospital? Mark only one oval.

- Yes
- No

12. What was the outcome of the hospital treatment?

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Send me a copy of my responses.

Please pass to the school welfare officer on your return to school.

Policy Agreed

Signed by: Chair of School Improvement Committee

Signed by: Chair of Governors

Date: