



EDUCATIONAL TRIPS AND VISITS POLICY & PROCEDURE

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1. Overview

SHARE MAT recognises the need for clear guidance and support for all schools across the trust for educational trips and visits. Guidance from the 'Health and Safety of Pupils on Educational Visits' (also known as 'HASPEV', part of the Health and Safety Executive, 'HSE'), the UK Government, the 'Adventure Activities Licensing Regulations' (also known as 'AALR'), and 'The Disabilities Discrimination Act' has been adopted in the production this document.

SHARE MAT recognises the benefit of well-planned trips and visits that and the learning opportunities that they provide outside the normal confines of school.

Sections of the policy can be used as a checklist by Educational Visit Coordinators ('EVC's), Educational Visit Assistants ('EVA's) and Trip Leaders.

2. Definitions and Categories of Visits

SHARE MAT defines an educational trip or visit as:

*'Any occasion when a student or group of students are away from the school site on an **educational**, and/or social, school related activity and under the supervision of a member of staff'*

All of the examples below are regarded as educational visits. They differ only in the level and extent of the planning and organisation required to manage them appropriately:

- Core curricular work such as field work or visits to historical sites
- Engaging with stimulating environments for art work or creative writing
- Subject enrichment such as theatre visits, concerts and museum visits
- Outdoor learning programmes (e.g., natural connections)
- Taking part in or watching sporting fixtures or other competitions
- Cultural visits or exchanges
- Residential stays
- Visits to countries outside the UK
- Outdoor Adventurous activities
- Expeditions.

Categories of trips:

SHARE MAT recognises **four** specific categories of trip:

Category 1	Curricular-related local trips or activities (most likely on foot) which take place entirely within the school day. E.g., visits to the local park, wood, pond, swimming pool, high school or other local schools.
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Category 2	Simple curricular or extra-curricular trips not involving activities in category 3 or 4 (may or may not require transport). E.g., theatre, zoo, historical visits, sporting events, inter-school sports, after school clubs (away from site), cinema.
Category 3	Trips <u>entirely within the UK</u> that involve any or all of the following: <ul style="list-style-type: none">• residential stays• visits to remote locations• adventurous or outdoor activities• outdoor centres• hotels• hostels• camping• coastal visits• remote forests or moorlands• canoeing• rock climbing• biking• orienteering• skiing
Category 4	Trips <u>outside</u> the UK E.g., overseas exchange, overseas charity expeditions, cultural visit to capital city outside the UK

All educational trips and visits must be sanctioned by the Headteacher and organised in accordance with this policy.

3. Principles of Safety Management

SHARE MAT recognises that safety on trips should not be considered in isolation. Safety should be considered within the context of the trust's broader culture of health and safety. All staff across the trust should be familiar with SHARE MAT's 'Health and Safety Policy' which is relevant to the content of this document.

A **Duty of care** is a legal obligation owed by anyone who takes responsibility for the safety of others. This applies equally to associated aspects of safe practice such as use of a minibus, fire and domestic safety, safety in built-up areas and provision of appropriate insurance. The duty of care owed to someone is heightened if the person is a student or young person or has physical or learning difficulties.

Safety has, at its basis, a sound framework of planning and organisation coupled with the competence of those members of staff responsible for the delivery and supervision of trips and visits. Competence itself relies upon an appropriate mix



of experience, training, common sense and working within known capabilities. There are a number of key elements that will identify good and safe practice which are identified within this policy.

Risk Assessments

A series of written risk assessments must be completed prior to each event or series of events and reviewed by a competent person. The person(s) carrying out the risk assessment should record it and give copies to all leaders and supervisors with details of the measures they should take to avoid or reduce the risks identified within the educational trip.

Adequate Supervision

Competent leadership is the most important safety factor of all, enthusiasm alone is not enough. Appropriate supervision ratios, along with the required competences and experience of leaders, should be identified as part of the risk assessment and planning process of an educational trip. Guidance on ratios and competencies can be found within this policy.

Training of Staff

SHARE MAT recognises that leaders need to be able to safeguard the physical and psychological health of the people, and especially young people, in their care. It is important that staff receive appropriate training for the organisation, leadership and supervision of educational trips and are therefore required to attend courses on:

- Educational Visits Co-ordinator Training (EVC training)
- Training for Visits Abroad, where appropriate
- Child Protection Training
- Emergency Aid Training, or First Aid Training

Clearly Defined Roles

It is essential that all those involved in the planning, management and delivery of educational trips and visits understand their roles and responsibilities. All roles and responsibilities are set out within this document.

Effective Communication

Effective communication during all stages of the planned visit is crucial. Communication regarding a planned trip should, where possible, be documented in writing involving all relevant parties.

Mobile phones and messaging platforms such as 'WhatsApp' can be a useful tool for staff however their use should be considered but not totally relied upon. Pupils will be provided with the contact numbers for staff in case of emergency.

Contact with parents whilst a trip or visit is underway is also essential. Parents will be provided with key contacts ahead of the trip to ensure they can get in touch with staff whilst they are away and also the school as necessary.



Planning and Preparation

All aspects of the proposed visit should be carefully planned.

Consideration must also be given to ensuring that appropriate contingency arrangements and emergency plans are in place and communicated to all relevant parties.

Monitoring

It is a vital link in the safety management chain that all relevant parties satisfy themselves through a monitoring process. Monitoring may be carried out by the Senior Leadership Team as part of the educational trips and visits process at any given time.

Evaluation and Retention of Documents

It is important to evaluate the outcomes of a particular visit in order to learn from the experience. The evaluation process will inform the planning and management of all future visits.

The reporting of potentially hazardous occurrences (near misses) allows for investigation and subsequent improvements to be made.

All documentation relating to the planning and review of trips and visits, including risk assessments, consent forms, checklists, itineraries and monitoring and evaluation forms should be retained in the school for one academic year from the date of return in line with the Information and Records Management Society (IRMS) guidelines.

4. Planning Visits

There are four steps that are required to be completed to gain authorisation for an educational trip or visit. Please see the flow chart below:





Step 3- Authorisation



Step 4- Implementation

Step 1 - Initial Approval

In the first instance, the Trip Leader must seek authorisation in principle from the Headteacher. At this early stage, details may be limited but should include:

- Objectives of the visit (an outline of each day)
- Dates, duration and venue
- Size and make-up of group
- Staffing requirements
- Other resources (such as transport)
- Estimate of costs. For costs exceeding £5,000 you must procure 3 quotations in line with the Procurement Policy & Procedure.
- Predicted risks

Step 2 - Detailed Planning and Risk Assessments

The Trip Leader, along with any other staff where appropriate, will complete detailed planning for the full duration of the trip. This should include:

- A day-by-day itinerary of the trip
- Catering arrangements
- Travel arrangements (including travel route plans where possible)
- Details of high-risk activities
- Risk assessments (relevant to the category of trip planned)
- Emergency plans

Step 3 - Authorisation

Once all detailed planning documents have been uploaded onto the 'Evolve' system, the Headteacher will approve all documents for the trip. The Headteacher should at this stage be satisfied that all appropriate measures are in place to safely run the trip.

Step 4 - Implementation

All planning has been completed, final adjustments to specific risk assessments and documents have been completed (such as medical risk assessments and emergency plans that may need altering). The trip is ready to go ahead.



5. Risk Assessments

On any educational trip or visit, the safety of participants, employees, volunteers or anyone working on behalf of the trust, is the primary objective. Participants must not be put in to a position that exposes them to an unreasonable level of risk.

A series of written Risk Assessment must be completed prior to each educational trip or visit, or series of trips or visits.

All person(s) carrying out risk assessments are required to record each risk assessment and give copies to all leaders and supervisors on the visit and to the Headteacher for approval.

All risk assessments will be held in the trip pack, copies of which will be held on site by the school and at the trip venue or on the person of the Trip Leader.

The purpose of a risk assessment is to:

- Identify the likely hazards to be encountered
- Identify those who are at risk
- Identify how risks can be mitigated to an acceptable level by implementing suitable control measures .

Forms of Risk Assessments

Risk assessments for a visit need not be complex but they should be as comprehensive as possible. Risks should be identified and appropriate control measures put in place.

Where certain specialised activities throw up particular hazards, the Headteacher must ensure that the person assessing the risk is competent to do so. Where people with additional support needs are participating, it is essential that appropriate advice is taken on what reasonable adjustments are required and how they can be made.

Dependant on the trip, different types of risk assessments may need to be completed. Please see the categories below and the suggested risk assessments:

Category:	Suggested risk assessments:
Category 1 (Low level day trips)	<ul style="list-style-type: none">• Travel- assess all methods of travel within the risk assessment, if more than one form of travel, complete a risk assessment for each• Activity- risk assess each individual activity• Medical- risk assessment for all students and staff attending. Any high-risk person(s) will need an individual risk assessment• Catering/food- where food will be provided by an external organisation this should be assessed in line with intolerances and allergies



<p>Category 2 (Medium level day trips)</p>	<ul style="list-style-type: none"> • Travel- assess all methods of travel within the risk assessment, if more than one form of travel will be used, a risk assessment is required for each • Activity- risk assess each individual activity • High risk activities- any sporting or higher risk activities should be individually risk assessed • Infection control- visits to venues with animals (i.e., farm) must be individually risk assessed • Medical- risk assessment required for all students and staff attending. Any high-risk person(s) will need an individual risk assessment • Catering/food- where food will be provided by an external organisation this should be assessed in line with intolerances and allergies • Behaviour- risk assess the students' behaviour e.g., mixing with the general public
<p>Category 3 (UK residential trips)</p>	<ul style="list-style-type: none"> • Travel- assess all methods of travel within the risk assessment, if more than one form of travel will be used, a risk assessment for each is required • Services and stop offs- risk assess the place of planned stops • Accommodation- risk assess where the staff and students will be staying • Fire and Evacuation- risk assess evacuation of key areas (such as accommodation, travel...) • Activity- risk assess each individual activity • High risk activities- any sporting or higher risk activities should be individually risk assessed • Infection control- visits to venues with animals (i.e., farm) must be individually risk assessed • Medical- risk assessment for all students and staff attending. Any high-risk person(s) will need an individual risk assessment • Catering/ food- where food will be provided by an external organisation this should be assessed in line with intolerances and allergies • Behaviour- risk assess the students' behaviour e.g., mixing with the general public
<p>Category 4 (Residential trips outside the UK and SEND residential trips)</p>	<ul style="list-style-type: none"> • Travel- assess all methods of travel within the risk assessment, if more than one form of travel will be used, a risk assessment is required for each • Services and stop offs- risk assess the place of planned stops • Accommodation- risk assess where the staff and students will be staying • Fire and Evacuation- risk assess evacuation of key areas (such as accommodation, travel...)



	<ul style="list-style-type: none">• Activity- risk assess each individual activity• High risk activities- any sporting or higher risk activities should be individually risk assessed• Infection control- visits to venues with animals (i.e., farm) must be individually risk assessed• Medical- risk assessment for all students and staff attending. Any high-risk person(s) will need an individual risk assessment• Catering/food- where food will be provided by an external organisation this should be assessed in line with intolerances and allergies• Behaviour- risk assess the students' behaviour e.g., mixing with the general public
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Repeat Events

Where a visit is one of a series of similar events (e.g., regular away sports fixtures or a series of programmed sessions at a ski centre) it may not be necessary to carry out written risk assessments for every occasion. Provided that the safety management arrangements do not significantly change and no additional hazards are identified (for example due to changing seasons or other factors), one document that covers the activity as a whole will suffice.

Notwithstanding this, it is important not to become complacent and a continual process of dynamic risk assessment should be taking place in order to monitor safety. Repeat event risk assessments should be reviewed following accidents or near misses to ensure that areas of risk are being effectively managed.

Residual Risk

It is unreasonable to expect that all risk will be eliminated from an educational trip or visit. The risk that remains having carried out a risk assessment and implemented control measures to manage it is called the "Residual Risk".

It is important that all those involved, including parents/carers, are aware and acknowledge that residual risk exists.

Exploratory Visits

Wherever possible the Trip Leader should undertake an exploratory visit to the proposed venue. This will not only assist in carrying out a more comprehensive and meaningful risk assessment, but should ascertain the suitability of the venue/area for meeting the trip's objectives and the needs of people with additional support needs. It will enable staff to better orientate themselves prior to taking the group.

If an exploratory visit is not possible then other sources of information must be sought in order to effectively assess risks. These might include:

- Discussions with and information from other organisations who have used the same venue

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- Tourist authorities
 - Management of the venue
 - The venue's own safety policy, risk assessment and operating procedures.

Storage and Retention

All risk assessments for an educational trip or visit will be stored on site at the school in accordance with the IRMS retention guidelines for schools and the General Data Protection Regulation.

Where emergency situations and incidents occur on an educational trip or visit, schools will be required to retain the risk assessments for a prolonged period of time or until the incident has been fully investigated and concluded (including any claims or legal actions).

6. Informing Parents and Parental Consent

SHARE MAT will obtain the written consent of parents for all educational trips and visits. There may be occasions where SHARE MAT reserves the right not to seek consent from parents, however these occasions will be explained to parents in advance.

It is imperative that parents/carers are sent, along with a consent form, detailed information about planned trips as early as possible in the planning process. The information provided must be sufficient to enable parents to make an informed decision about their child's participation.

For repeat trips and visits, such as sporting fixtures, SHARE MAT reserves the right to use 'blanket consent' from parents.

Parents have the right to remove consent at any given time by contacting the school directly.

Parental consent forms will be held for the full duration of the trip and will be disposed of in line with the 'General Data Protection Policy'.

7. First Aid Provisions

As a general principle, young people should have access to appropriate First Aid assistance depending on the nature of the visit and as informed by the risk assessment.

As a minimum, at least one member of staff should be trained in Emergency First Aid for every visit. Where separate sub-groups of young people will be created during the course of a visit, each group should aim to have a similarly trained member of staff. Consideration will be given to the need for more comprehensive first aid provision when supervising adventurous and outdoor activities and particularly in remote environments.



A portable First Aid Kit should be taken and be readily accessible throughout the trip at all times. All members of staff on the trip should be aware of the contents of the First Aid Kit and know who is trained to use it. All students should be made aware of who is responsible for the portable first aid kit and where it will be held at all times.

The Trip Leader should be aware and have taken account of any existing medical conditions and/or special needs that group members may have. This information will be sought on the parental consent form at the data collection stage of planning. Where students or staff with medical needs or injuries are identified, an individual medical risk assessment may need to be completed. Additional planning such as a healthcare plan, a personal emergency evacuation plan and emergency planning for the designated person may also need to be completed.

Trip Leaders must carry clear written instructions relating to the administering of any medication required to party members. Reference should be made to the MAT's policy on the administration of medication in school, which can be found in the '*Supporting Students with Medical Needs Policy*' and the '*First Aid Policy*'.

For residential trips, especially trips abroad, young people often bring along non-prescribed medication for dealing with situations which may arise. In some instances, it may make the distribution of non-prescribed medication easier if it is dealt with centrally by the accompanying staff i.e., medication is bought and kept centrally. All medication, even non-prescribed medication, should be recorded in the medical risk assessment for the group.

Where first aid has been administered, normal recording and reporting procedures must be followed.

8. Financial Planning

The Trip Leader should ensure that parents have early written information about:

- The costs of the trip (this may initially be an estimated cost however where costs fluctuate, this should be communicated at the earliest convenience to parents)
- What proportion of the overall cost parents will be expected to pay (i.e., if there will be funding to cover parts of the costs)?
- The timetable for payments
- The banking and accounting arrangements
- The policy for dropping out of a trip, refunds and cover

Financial accounting procedures should be agreed with the Headteacher and SHARE MAT's Central Finance Team and should be in line with the trust's financial policies.

A school will need to consider how it will fund any additional cost (e.g., extra staffing) that may arise from the inclusion of participants with additional support needs or cover costs. This may be included into the overall cost of the trip for pupils.



Trip Leaders may choose to consider lower-cost options for areas of the trip such as travel. This will be included in the initial submission of approval of the trip to the Headteacher.

9. External Providers and Contractors

Where elements of the planned trip are contracted out to one or more external providers, and where the provider accepts a duty of care for group members, the Trip Leader must satisfy him/herself that the provider:

- Is reputable and reliable
- Has carried out a satisfactory risk assessment appropriate to the planned trip
- Has competent staff
- Has appropriate public liability insurance
- Has first aid provisions available to support the school
- Has complied with child protection requirements (such as DBS checks)
- Is able to accommodate any additional support needs of group members.

There are additional requirements placed upon providers of adventurous and outdoor activities, residential facilities and overseas travel.

Trip Leaders who wish to hire transport, i.e. coaches etc. may liaise with the Procurement Officer to obtain details of trust approved coach providers.

Public Liability Insurance

It is a requirement that any company or other external organisation to which services on visits are contracted must provide proof of current public liability insurance cover with an indemnity limit of a minimum of five million pounds (£5m).

Disclosure Checks (Child Protection)

External providers who accept a duty of care for young people are required to sign a declaration confirming that all of their staff who will have access to participants have been disclosure checked at an enhanced level. SHARE MAT reserves the rights to only select organisations who meet the requirements set for safeguarding purposes.



10. Category 3 and 4 Visits - Special Consideration

Coastal Visits

Many of the incidents affecting pupils have occurred by or in the sea and there are dangers on the coast quite apart from those incurred in swimming. The Trip Leader must bear the following points in mind when assessing the risks of a coastal activity:

- Tides, rip tides and sandbanks are potential hazards; timings and exit routes should be checked before activities proceed
- Awareness of warning signs and flags, their meanings and the impact on the activities
- Identify a base on the beach to which members of the group may return if separated
- Hazards such as glass, barbed wire and sewage outflows etc.
- Plan for recreational time
- Determine which areas of the terrain are out of bounds, and whether the risk assessment allows swimming in the sea
- Cliff tops can be highly dangerous for groups of young people even during daylight.
- The group should keep to a safe distance from the cliff edge at all times - a "buffer zone" between the participants and the hazard. Be aware that cliff falls can mean that cliff paths stop abruptly at the cliff edge
- The local coastguard, harbour master, lifeguard, local authority adviser, countryside ranger or tourist information office can provide information and advice on the nature and location of hazards

Swimming in The Sea or Other Natural Waters

Swimming and paddling or otherwise entering the waters of river, canal, sea or loch should never be allowed as an impromptu activity. In-water activities should take place only when a proper risk assessment has been completed and proper measures put in place to control the risks.

Any planned swimming activity that takes place in areas that are NOT specifically designated for bathing and do not have lifeguard surveillance in place should be regarded as an Adventurous Activity. Additional risk assessments and precautions should be completed.

A dynamic risk assessment should be completed on the students ahead of starting the activity to ensure that they are all capable and able to swim.

If unsure whether it is safe to start or continue an activity, Trip Leaders should seek advice from a professional.

Farm Visits

All educational farm visits should be arranged through a reputable company or organisation. Groups wishing to arrange alternative visits should discuss plans with the designated advisor at least 28 days in advance of the planned visit.



Trips to working farms can be valuable experiences for young people but potentially have special risks associated with farm machinery, physical contact from animals, infection, food and chemical poisoning.

Trip Leaders should ensure that:

- Eating areas are separate from those that have any contact with animals or where animals have potentially been
- There are adequate, clean and well-maintained washing facilities available
- There is clear information for visitors on the risks and the precautions to take
- There is adequately trained adult supervision wherever children can come into contact with animals and need to wash their hands
- All children wash their hands thoroughly immediately after touching animals and before any eating or drinking
- Shoes are cleaned and then hands are washed on leaving the farm

Trip Leaders should never let participants:

- Place their faces against the animals
- Put their hands in their own mouths after touching or feeding the animals
- Eat or drink while going round the farm
- Eat or drink until they have washed their hands
- Sample any of the animal's food or water
- Drink from farm taps (other than designated public facilities)
- Touch animal droppings - if they do then they must wash and dry hands
- Ride on tractors or other machines, unless risk assessed and planned ahead of the trip
- Play in the farm area, or in other areas that are out of bounds such as grain storage tanks, slurry pits etc.

Visits Involving Adventurous Outdoor Activities

These activities may be defined as: -

Activities in which the level of perceived risk exceeds that of normal daily living and where specific safety measures involving specially trained staff and specialist equipment are required in order to reduce risks to an acceptable level.

An activity may be deemed 'adventurous' by the nature of the location in which it happens as well as by the activity itself. For general guidance, if the planned activity would, by its nature or location require staff with specialist training and/or qualifications to supervise it, then it should be regarded as an adventurous activity.

Remote Locations

An activity that may not normally by its nature be defined 'adventurous' is deemed to be so if it takes place in a location that is remote from immediate assistance. e.g., some coastal walks or field work in a remote area of woodland.



For general guidance, if the location of activities is likely to involve being more than 30 minutes walking time from a public road or vehicle access point, it should be regarded as remote.

External Providers of Adventurous or Outdoor Activities

Where an Outdoor Centre or other organisation is contracted to supply elements of an Outdoor Education/Learning programme, the Trip Leader must ensure that in addition to the requirements of this policy:

EITHER: the provider is appropriately licensed by the Adventure Activities Licensing Service (AALS) for the activities they plan to provide. The status of all licensed providers can be checked at <http://www.hse.gov.uk/aala/index.htm> or www.aala.org

OR: the provider, if unlicensed, will only offer activities that fall out of the scope of the Adventure Activities Licensing Regulations and that they have an appropriately robust safety management system.

It is strongly recommended that at an early-stage Trip Leaders discuss their plans to use any licensed or unlicensed providers with the designated advisor for the trust, who will be able to give guidance and advice.

In-House Provision

All adventurous or outdoor activities MUST be staffed by people who are appropriately qualified to lead them and within the prescribed supervision ratios outlined within this policy.

Adventure or Outdoor Activity Equipment

Where stocks of adventure or outdoor activity equipment are held in school, the Headteacher must ensure that: -

- It is stored securely with restricted access so that only appropriately qualified people can access technical equipment
- It is stored according to the manufacturer's recommendations.

Personal Protective Equipment (PPE) is tested and checked according to PPE regulations by a recommended provider.

- All technical equipment is visually checked by an appropriately trained person prior to every use and is inspected at least annually by a Technical Advisor who will submit a report on its condition along with recommendations.
- Worn or damaged equipment is quarantined for repair or discarded.
- All tests and periodic checks on items of equipment are separately recorded including details of when each item was introduced into stock.

Residential Stays and Overseas Trips

Where an educational trip involves one or more overnight stays, the rules and guidance in the next section must be taken into account. There are particular difficulties in reliably assessing the safety management standards of overseas



providers and it is strongly recommended that Trip Leaders seek advice at an early stage from the designated advisor for the trust.

Visits Involving Overnight Stays

Residential stays put additional demands upon staff in both the planning and supervision of trips.

At the planning stage Trip Leaders must ensure that:

- Staffing ratios and supervision rotas allow for effective supervision 24 hours per day and have built-in flexibility in the event of a participant requiring a high level of supervision
- For mixed gender groups, there are both male and female leaders (It is recognised that for some primary schools this can prove problematic) and that the accommodation provides separate male and female sleeping/bathroom facilities that the group will have exclusive use of the immediate accommodation allocated to them
- Staff accommodation (at least those on duty) is adjacent to the group's accommodation
- The accommodation has adequate security measures in place. Group accommodation should be lockable but leaders must have access at all times
- The organisation that owns or manages the accommodation has checked all staff who work there for their suitability to work with young people
- The accommodation complies with local fire regulations and that adequate fire alarm and evacuation procedures are in place, taking account of any participants with additional support needs
- The accommodation is able to cater for participants with additional support needs including disabled access, and dietary, cultural or religious requirements
- Measures are in place to provide first aid and for the seeking of outside medical help

At the start of the trip, the Trip Leader must:


- Orientate children/young people to the accommodation layout
- Brief children/young people on the fire alarm evacuation procedures and muster stations in the event of a fire. If a fire drill is not undertaken for all people in the building, leaders should simulate a fire drill with their entire party before bedtime on the day of arrival
- Ensure that children/young people are briefed on what's expected of them, any rules that are to be imposed and the mutual responsibilities everyone has in regard to communal living

Visits Outside the UK

Since it is usually implicit that visits overseas will have a residential element, it should be assumed that all of the above apply. In addition, Trip Leaders should give further consideration to the following:



- **Staffing ratios:** consider if there are particular supervision issues relating to being abroad that will require more favourable ratios
- **Language differences:** participants should be encouraged to communicate and consideration should be given to providing participants with some common words and phrases. At least one member of staff should be reasonably fluent in the local language or have the ability to communicate and translate
- **Cultural differences:** staff and students should be briefed about local conventions, codes of conduct, laws, dress codes and attitudes to gender
- **Food and drink:** any dangers attached to local foods or drinking water should be communicated to all staff and students
- **Urban safety and security:** some towns and cities may be intrinsically more dangerous than participant's home environment and a careful briefing would be required
- **Wildlife:** In the UK we are not used to wildlife that presents a real threat to life. This may not be the case overseas. All local wildlife should be considered. Consultation with a specialist may be required during the planning stage of the trip
- **Currency:** provide advice on security, exchange rates and forms in which to carry money
- **Vaccination:** establish whether vaccinations are required in the countries to be visited and ensure these are carried out in good time. Guidance can be sought from local GP's and Health Professionals
- **Travel Insurance:** Insurance for trips will be provided by the MAT's Central Finance Team. This should be arranged during the planning stage of the trip
- **Visas/Passports:** ensure that all participants have valid passports and visas if required at an early stage in planning. It is recommended that the Trip Leader retains a photocopy of passports/visas for emergency use. Schools may choose to hold the passports on site ahead of the trip departing
- **Medical help:** For travel in the EU, participants should carry a UK GHIC card, available from Post Offices and completed by their parent/carer. This is a card of entitlement to free or reduced cost treatment in the EU. It is still advisable to have a substantial contingency fund available to pay for treatment if required. Payment can be reclaimed later through travel insurance. An EHIC card may no longer be valid after Brexit. Additional arrangements may be made
- **Emergencies:** Trip Leaders should know how to contact the nearest British Embassy or Consulate. They should know how to contact the emergency services in the local area. All details should be held in the emergency planning document in the trip pack
- **Climate:** Trip Leaders need to be fully aware of additional precautions required. These could include sun screening, monitoring fluid intake to prevent dehydration, or additional clothing for extreme cold. This should be communicated to parents and students ahead of the trip departing
- **Code of Conduct:** It is strongly advised that a Code of Conduct is drawn up for each visit and is signed by the pupil and parent/carer. Exemplars are included in 'Training for Visits Abroad'

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- **Mobile Phones:** The taking and/or use of mobile phones should be part of the risk assessment process and will be determined by the ages of participants, activities, etc. Phones with cameras should have conditions of use, for example, not in private areas like bedrooms or changing areas

Booking through a Travel Agent or Tour Operator

- Ensure that the company is appropriately bonded providing security against insolvency. The form of bonding should be approved by the Department of Trade and Industry
- Ensure that, where air travel is involved, the tour operator is ATOL Licensed

If organising your own visit

- Ensure that you comply with the European Package Travel Directive
- Ensure contingency plans are in place when using budget airlines
- Special regulations apply to taking minibuses abroad and advice should be sought from an advisor

Transport

Hiring vehicles for educational trips and visits should be through an approved supplier within the trust.

Where transport is provided by the MAT

Where transport is provided by the MAT it is likely to be by school-owned minibus or one or more members of staff's own private car.

Only staff who have undergone the driver assessment are permitted to drive school minibuses when carrying passengers.

The Headteacher must ensure that all those driving vehicles within the school must hold the relevant, valid licence, together with the appropriate insurance. If using their own vehicle, staff should seek the advice of their insurer, informing them of the activities they are required to undertake for SHARE MAT.

Regardless of other responsibilities and status, responsibility for the conduct of passengers and the safety and integrity of any load, both carried or towed, lies with the driver of the vehicle. Drivers are expected to:

- Inspect the vehicle before use
- Never use a faulty vehicle. Use an alternative vehicle or make alternative arrangements if a fault is found
- Report all faults on vehicles to the Administration Manager
- Follow the relevant road traffic legislation
- Take careful account of weather and road conditions. On no account should drivers place themselves or passengers at unnecessary risk
- Follow good practice

Minibus check sheets are available at the request of the Administration Manager or in the '*Driving on Work Related Business*' Policy.



All passengers should have a forward or rearward facing seat and all seats should be fitted with approved seatbelts. It is the driver's responsibility to ensure that seat belts are worn at all times for the duration of travel.

For participants with additional support needs, Trip Leaders must ensure that transport arrangements are appropriate and, where necessary, an escort (passenger assistant) is provided.

On long journeys due consideration must be given to the driver hours required and the length of the driver's day. The limitations imposed by the European Work Time Directive should be taken into account.

It should be recognised that driver fatigue is a very high contributory factor to road traffic accidents and this should be taken account of as part of the risk assessment process. It is almost always desirable to delegate responsibility for the supervision of passengers to a second adult in the vehicle.

Luggage should be carried so as not to obstruct aisles or exits. There are specific rules relating to towing trailers with minibuses. Good advice can be obtained from the Community Transport Association or from the Trust's designated advisor.

When setting down pupils from a minibus the vehicle exit door should be kerbside, so that passengers do not have to enter the carriageway.

Vehicles should, where possible, be parked on the same side of the carriageway as the activity to minimise the need for persons to cross the carriageway.

Where a private car is used to transport young people, staff should ensure that appropriate insurance cover is in place. SHARE MAT requires staff to hold business car insurance.

Breakdowns - Emergency Assistance

All minibuses are covered by vehicle breakdown assistance, details of which are located in the minibus folder. This should be checked by the Trip Leader ahead of the departure of the trip. Additional information on this is available from the Administration Manager at each site or the Central Finance team.

In the event of a breakdown, accident or other major delay the driver must inform the school (ideally the EVC or EVA) of any delay. Steps should also be taken to ensure the safety of the passengers by evacuating the vehicle if it is stopped in a dangerous place.

Information will then be communicated to parents about anticipated arrival time to the destination or back to school and any change to the arrangements.

Overseas Travel

All overseas travel will be arranged with a reputable and pre-approved coach provider.

SHARE MAT does not expect its own staff to drive school minibuses abroad.

Coach Hire



Where transport is contracted to a coach hire company Trip Leaders and EVC's are required to check to ensure that the Coach Hire Company is approved for Education and Children's Services use. This includes travel overseas where the tour operator may sub-contract the coach hire.

Trip Leaders should ensure that for long journeys, particularly to mainland Europe or beyond, there are sufficient drivers available to prevent driver hours being exceeded. Drivers on 'down time' should be encouraged to get proper rest and NOT fulfil the role of co-driver which requires them to remain alert.

Supervision of Passengers

It should NOT be left to the driver to impose the discipline required to maintain acceptable behaviour. In practice, it is not possible to supervise young passengers and concentrate on driving at the same time. Responsibility for the conduct of passengers should be accepted by the Trip Leader and the staff supervising the educational trip. Where school provide their own transport, there should be another adult aboard in addition to the driver, especially on long journeys (one hour or more).

Where young people have additional support needs it is important to refer to individual support plans, in particular, information on access requirements.

Use of Mobile Phones

The taking and/or use of mobile phones should be part of the risk assessment process and will be determined by the ages of participants, activities, etc. Phones with cameras MUST have conditions of use, for example, not to be used in private areas like bedrooms or changing areas.

11. Management of Trips

SHARE MAT considers the administrative and managerial requirements for the organisation and management of trips and identifies a number of Key Individuals that will have a role in most visits. Depending on the size of the trip group and/or size of the school, several of the key roles may be carried out by a single key individual.

It is essential that all those involved understand their responsibilities and that there are clear channels of communication through the management system, from policy makers to participants and parents/carers.



Roles and Responsibilities

Headteacher

The Headteacher has responsibility for ensuring safe practice and for the implementation of the MAT's health and safety policy in relation to educational trips and visits. Special care should be taken to ensure that:

- The proposed trip has appropriate, achievable and well-defined aims
- All employees and volunteers are competent and have appropriate experience and training
- Trip Leaders are allowed sufficient time to organise visits properly
- Party size, group size and ratios of staff/volunteers to young people conform to the guidelines
- Appropriate information is provided to young people and parents/carers
- Parental consents are sought and received
- All required risk assessments have been carried out and are done to a sufficient level of compliance
- Transport arrangements are appropriate
- Child protection procedures are in place and will be followed
- Contingency arrangements are in place
- The financial and insurance arrangements are adequate
- The particular requirements of those with additional support needs are considered, including arrangements for medication
- Adequate first aid arrangements will be in place
- A Trip Leader has been designated for the visit and he/she has a clear understanding of his/her roles and responsibilities
- A Base Contact Person (Educational Visits Co-ordinator) is appointed and identified to the Trip Leader and to parents/carers
- Contact arrangements are sufficient for all eventualities and will enable a co-ordinated response to any incident that may occur
- Staff and volunteers involved understand their respective roles and responsibilities
- 'Checking out' and 'Checking in' procedures at the beginning and end of the trip/visit are in place

In all cases the responsibility to approve each trip rests with the Headteacher. The role of the Trust's advisor is to provide specialist advice for educational trips and visits.

Delegated Deputy

Some or all of the above responsibilities may be delegated to another appropriate member of staff in school. In such cases the responsibilities must be clearly stated and understood by all concerned. The overall responsibility for the visit remains with the Headteacher.

Trip Leader



The Trip Leader is the person in whom the Headteacher has placed responsibility for the safe conduct of an educational trip or visit. Some of the responsibilities listed below may be shared with additional members of staff where appropriate.

The Trip Leader has overall responsibility for the safety of individuals and the group at all times. In particular, he/she will be responsible for:

- Ensuring the implementation of the Trust's Educational Trips & Visits policy
- Ensuring that all participants in their care are adequately briefed
- Ensuring that all participants are suitably prepared and equipped
- Effective liaison with other staff involved in the programme
- Ensuring that the EVC has all the information they require to fulfil their role
- Taking account of any additional support needs
- Making arrangements for any medical or dietary requirements
- Ensuring there is adequate First Aid provision
- Ensuring all required risk assessments have been carried out and that other staff are appropriately informed
- Abandoning or curtailing the trip or activities if, in his/her judgement the health and safety of participants is unacceptably compromised
- Briefing and giving appropriate information to the EVC

The nominated Trip Leader will often be the most experienced member of the trip's staff team and should retain overall control of the visit regardless of his/her status within school.

Trip Staff

Other adults accompanying trips and who are given supervisory responsibility, whether paid or voluntary, act as trip staff. Trip staff should:

- Assist and support the Trip Leader in carrying out his/her responsibilities and respect the fact that final responsibility for decision making during the visit lies with the Trip Leader
- Take responsibility for the safety and well-being of participants as delegated by the Trip Leader
- Consider stopping the activity or visit and notifying the Trip Leader if they believe the health and safety of those in their care is compromised

Specialist staff may be involved to provide instruction or coaching of activities. Such staff may be the Trip Leader, other members of staff/volunteers or appointed specialists.

They have responsibility to ensure that:

- All equipment is checked for suitability and is in a safe condition
- They operate within the school's health and safety policy
- Where appropriate they adhere to other relevant codes of practice
- They act within the scope of their experience and training
- They are appropriately insured
- Acceptable supervision ratios are maintained



Specialist staff working for contracted external providers have similar responsibilities but must work within the scope of their employer's safety management arrangements and within the contractual arrangements between the MAT and the provider.

Base Contact Person - EVC

This person has a crucial role in the safety management system and will normally be ideally a trained EVC or EVA. The designated person should be appointed by the Headteacher and will remain 'back at base' and be contactable 24 hours a day throughout the duration of the visit. He/she is responsible for:

- Ensuring they obtain sufficient information from the Trip Leader ahead of the trip departing
- Acting as an emergency contact between the Trip Leader, the school and parents/carers
- Acting as the main point of contact back at base in the event of a critical incident

Parents/Carers

Parents/carers must be able to make an informed decision on whether their child should go on a visit. Parents/carers should be given sufficient information in writing and should be invited to attend any proposed briefing sessions in advance of the trip's detailed planning stages.

Parents/carers should:

- Be informed how best to prepare their child for the visit by reinforcing the notified code of conduct (where appropriate)
- Be aware of and agree to arrangements for sending young people home early if necessary and to meet the costs incurred
- Provide the Trip Leader with emergency contact information as requested
- Disclose to the Trip Leader all relevant information about their child's psychological and physical health that may be relevant to their participation. This would normally be done via the parental consent form but may, on occasion, require further written information

Changes to Original Plans

It should be recognised that 'on the day', all may not go according to plan. An important contributing factor to safety lies in there being sufficient flexibility to change or modify the nature of the planned activity in the face of adverse factors such as weather, road conditions, group numbers and ill-preparedness of individuals for the planned activity.

A decision to change the plan may be made either by the Trip Leader on the basis of his/her own recognised experience and technical expertise, or on the advice of another member of the staff team delegated with responsibility for the conduct of the activity.



In either case, if the changes made involve the activity taking place in a different location or is likely to result in a delayed return, the Trip Leader must notify the Base Contact Person (EVC) prior to commencement of the activity.

Although rare, in extreme situations it may be necessary to curtail the trip.

Competence of Staff

It is part of the Headteacher's responsibility to ensure that staff have the appropriate competences to lead visits. Competence is derived from a blend of experience including shadowing, training, common sense and working within known capabilities.

It is a fundamental of Health and Safety law that employees are given appropriate training to carry out the tasks required of them. It is the employee's responsibility not to operate outside the scope of their competence. This applies even more so in circumstances where a duty of care for others has been accepted.

Supervision

Adequate supervision of parties on trips is a crucial element of safety management. Supervision must be such that it is adequate throughout the visit. Staffing ratios must reflect the needs of the group of children/young people and not simply the trip or activity. It is important to evaluate the composition of any group and give careful consideration to the needs of the individuals within that group. Only then can a realistic estimate be made of the requirements for staffing, staff expertise and resources to enable the objectives to be achieved.

Due consideration should be given to gender balance. Trip Leaders should consider supervision requirements as part of the risk assessment process. This should then inform the appropriate ratios and competences of supervisors. It is recommended that there are always at least TWO staff accompanying visits except in circumstances where the activities are closely akin to normal day to day living. It is acknowledged that there will be circumstances where it will be appropriate and beneficial to use senior pupils to assist with the supervision of younger children. Senior pupils must always be managed in this role by a member of school staff and must never be left in sole charge of young people.

Supervision ratios

Notwithstanding the above, the table below provides guidance on acceptable supervision ratios. These ratios should be regarded as a maximum and must not be exceeded but may well need to be reduced.

Type of trip	Staff	Students
Category 1 and 2 visits (EYFS)	1	5
Category 1 and 2 Visits (Primary Students)	1	8
Category 1 and 2 Visits (Secondary Students)	1	15
Category 3 and 4 Visits (Primary and Secondary with no high-risk activities)	1	10



Please refer to the list below

Type of high-risk trip	Staff	Students
Farm visit (children age between five and eight)	1	8
Farm visit (children age between nine and eleven)	1	10
Farm visit (children age twelve and above)	1	12
Forest and coastal walking (Primary)	1	10
Forest and coastal walking (Secondary)	1	12
Orienteering	1	15
Hill and mountain walking (summer)	1	10
Hill and mountain walking (winter)	1	8
Mountain walking	1	6
Rock climbing (single pitch)	1	9
Rock climbing (multi pitch)	1	2
Gorge walking	1	10
Kayaking (flat water)	1	10
Kayaking (white water)	2	10
Sea kayaking (sheltered water)	1	10
Sea kayaking (offshore)	2	10
Sea kayaking (surfing)	1	8
Open canoeing (flat water)	1	10
Open canoeing (white water)	2	10
Alpine Skiing	1	10
Nordic Skiing	1	10
Ski touring/Ski Mountaineering	1	6
Cycling (on or off road)	1	8
Sailing (in-land single handed dinghies - 2 students per boat)	1	6
Sailing (tidal waters)	1	6
Windsurfing	1	6

Larger Parties

There are particular difficulties in safely managing large parties and reliance on staffing ratios alone is not enough. For the duration of the visit each staff member must assume separate responsibility for an appropriately sized group of named participants within acceptable ratios.

Buddy System

Staff supervision can be effectively complemented by the use of a buddy system. Students are teamed up with one or two 'buddies' as a minimum and each regularly checks on the other(s). Buddy systems are also useful for encouraging and developing responsibility and a sense of community.

Group Management

It is vital that head counts are done at regular intervals and at least prior to and at the end of each group movement from one location to another. Keeping account



of large groups is made easier by individual supervisors each accepting responsibility for a small manageable team and reporting directly to the Trip Leader that their team is present and correct.

It is good practice for supervisors to:

- Carry a list of the names of all participants and accompanying adults at all times
- Make sure that all participants know a rendezvous points if they become separated

Consideration could be given to:

- Ensuring students are easily identifiable through the use of coloured T shirts, baseball caps or school uniform/dress code or similar
- Providing students with badges or cards containing details of their hotel and an emergency contact number. For overseas visits consider a card written in the local language as well as English

Levels of Supervision

Supervision of students must be maintained 24/7 throughout the visit. There are different levels of supervision:

- **Close supervision** – the normal level of supervision within the active or programmed phases of the visit
- **Remote supervision** – where the activity is not directly supervised but participants are operating in groups within clearly stated and understood parameters. Supervisors are present but not necessarily within sight
- **Down time** – the time outside programmed activity. This may involve different levels of supervision from close supervision of organised recreational activity through remote supervision of 'free time' to being 'on call' during sleep time.

Remote Supervision

The nature of some educational visits or activities may require students to work in groups without direct supervision in order to properly meet learning objectives. The most common of these is probably the Duke of Edinburgh Award Scheme expeditions, although certain types of practical field work may also require it. When young people are being remotely supervised, the party leader must:

- Ensure that parents/carers are aware of the arrangement before the trip departs
- Carefully brief students with clear guidelines on the parameters within which they should operate and emergency procedures/contacts.
- Draw up a code of conduct to which students and parents/carers will commit
- Understand that remote supervision places additional demands on supervisors but that the duty of care owed to students is not diminished.

The Duke of Edinburgh Award Expeditions and similar trips must adhere strictly to these guidelines.



It is essential that everyone involved in the trip (staff and students) understand the supervision arrangements and the expectations upon them.

Additional Support Needs

It would not be possible in a general document like this one to provide specific advice relevant to all activities and all needs. The judgement of staff/volunteers skilled both in meeting additional support needs and the principles of good practice contained throughout this document should be relied upon.

In some cases, the format of visit or activity and its venue may need to be adjusted to suit the individuals involved.

Equipment and other resources deployed may need particular consideration.

The number of staff/volunteers and the range of expertise and competencies should be determined by the needs of the individuals within the group and the nature of the activity. While particular competencies may be required to support participants with additional support needs, it is desirable that, with participant and parental consent, relevant information is shared with the group. This will enable group members to participate as fully as possible and be mutually supportive.

Staff Fatigue

Leading visits, particularly those involving a residential stay can be both physically and emotionally demanding. It should normally be the case that at least two adults accompany any one group and due consideration should be given to sharing tasks and responsibilities.

It may sometimes be the case that the trip leader or instructor is the only member of field staff present. Consideration should therefore be given to providing a support member of staff who can share the driving and other appropriate tasks. Where relevant, the issue of staff fatigue should be considered in the risk assessment process.

The European Working Time Directive 1998 provides work practice regulations designed to protect employees and those in their charge from the hazards associated with excessive fatigue.

Child Protection

The Trip Leader and, wherever possible, all other Leaders should have undergone sufficient child protection training. All volunteer adults with a supervisory responsibility should have undergone DBS checks to an enhanced level. It is acknowledged that this may not be possible for staff employed by organisations operating overseas and all reasonable steps should be taken to ensure that such staff have, at least, been screened by their employer.

It is recommended that Trip Leaders and other Leaders have to hand a (laminated) pocket guide to Child Protection procedures.

12. Response to Emergencies



Emergency situations can occur despite the best precautions and therefore contingency planning and consideration of emergency procedures are necessary. Planning for emergencies should help to ensure that the consequences of an incident are handled efficiently and sensitively and do not progress arbitrarily.

Reference should be made to the 'Education and Children's Services Emergency Plan (August 2001)' when preparing establishment contingency plans. An Educational Emergency can be defined as:

"Any incident which cannot be resolved by an educational establishment employing its own resources. This could include death or serious injury to a member of staff, pupil, leaders and other helpers using educational property or on an educational visit. It could also include the loss of some or all of the party on an educational visit or expedition. Additionally, it could include traffic accidents, serious disruption caused by bad weather, damage to property, waterborne or food borne hazards and loss of heating or power supplies"

In addition to this policy, SHARE MAT has produced a Critical Incident Management Plan for all staff to use whilst managing educational trips and visits.

External Providers

Organisations providing accommodation, activities or other services involving the acceptance of a duty of care should have their own emergency response procedures with which Trip Leaders and other staff should normally co-operate fully. In addition, Trip Leaders must familiarise themselves with the procedures outlined in this section to enable them to fulfil any additional responsibilities and make prompt and appropriate notifications.

Planning for Emergency Situations

Within the Critical Incident Management Plan, SHARE MAT has outlined how staff should plan for an emergency situation during an educational trip or visit. The Critical Incident Management Plan is to allow trip leaders to consider the emergency risks and ensure that they have sufficient information and support ahead of departing in the event of an emergency situation.

Reporting and Recording an Emergency Situation

All trip leaders are to take a copy of the Critical Incident Management Plan with them ahead of departing. SHARE MAT has included an Incident Form in this document for trip leaders to complete in the event of an emergency situation.

The Incident Form covers the following:

- The nature of the incident
- The location of the incident
- The names of those involved in the incident
- The planned and completed actions following the incident?
- The roles of staff in the incident



Trip Leaders are to complete the Incident Form and return it to the Headteacher on arrival back from the trip. The form will then be used in the review of the trip with Senior Leadership.

Investigation of Incidents

Although the responses to an emergency and any subsequent investigation have common threads, they should always be regarded as entirely separate management functions.

Investigation procedures must be designed to cater for various levels of incident and to allow sensitive handling of situations arising from unplanned circumstances.

The investigation should be an information gathering exercise. As such it should be carried out in a reasonably informal and non-judgmental manner. The intent is to seek the causes of incidents in order to inform the ongoing development of good practice.

All near misses should be investigated by the Headteacher and Trip Leader.

13. Reviewing and Monitoring Arrangements

SHARE MAT's '*Educational Trips and Visits Policy*' is reviewed by the MAT, evaluated and updated annually. All appropriate legislation and guidance are considered when this policy is under review.

14. Associated Policies and Documents

There are additional supporting documents and tools to support the management and running of educational trips and visits. Please see the list of supporting documents below:

- Health and Safety Policy
- Supporting Students with Medical Needs Policy
- First Aid Policy
- Driving on Work Related Business Policy
- Critical Incident Management Plan
- Suite of risk assessments
- Educational Trips and Visits Training Course

15. Contact

Any questions or concerns regarding this policy should be directed to the Trust's Premises & Compliance Manager:

Lisa Audsley



Email- lisa.audsley@sharemat.co.uk

Telephone- 014840 868777

16. Complaints and Escalation

SHARE MAT takes any complaints about the safety and management of all its Educational Trips and Visits seriously.

Concerns relating to an Educational Trip or Visit should be directed to the Headteacher of the school in the first instance or the Premises & Compliance Manager.

Issues that are not resolved internally to the satisfaction of the complainant should be directed to the Health and Safety Executive:

Telephone - 0300 003 1647

Online

<https://webcommunities.hse.gov.uk/connect.ti/concernsform/answerQuestionnaire?qid=594147>