



Educational Visits Policy

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Educational Visits Policy

The Mead Infant and Nursery School

Introduction

The school has a strong commitment to the added value of learning beyond the statutory school day and beyond the school premises. Bourne Education Trust (BET/the Trust) and its constituent schools have adopted national guidance published by the Outdoor Education Advisors Panel (OEAP) (<https://oeapng.info/>) for planning, running and evaluating educational visits. School staff must consult national guidance and, in the event of conflicting advice, seek clarification from the school's Educational Visits Coordinator (EVC) and/or the Trust's Operations Director.

Scope

This policy covers all educational visits within or outside normal working hours, including weekends and holiday periods. Educational visits are those activities arranged for pupils which take place outside the school grounds. This includes activities such as visits to local parks, museums, libraries, sports facilities; cultural, educational and recreational outdoor activities.

This policy sets out advice and guidance to school staff in planning, running and evaluating educational visits, ensuring that risks are managed and minimised for the health, safety and welfare of pupils, staff and members of the public.

Aims

The school aims to offer a broad and balanced range of exciting and stimulating educational visits. All pupils are given the opportunity to benefit from participation in a wide range of educational visits, irrespective of social background, culture, race, gender, gender assignment, religion or belief, sexual orientation or differences in ability and disabilities.

Whether their emphasis is adventurous, academic, sporting, cultural, spiritual or creative, educational visits provide first-hand experiences that inspire and enhance learning and development in ways which are powerful and lasting. They provide a foundation for life-long learning and healthy lifestyles, as well as complementing classroom learning and enriching the curriculum. The benefit for students of visiting venues, gaining first-hand experience and participating in activities is seen as invaluable in their educational and personal development. The opportunities offered serve to:

- Bring breadth to the learning experience and stimulate enquiry
- Extend, enlighten and enrich the curriculum and the pupil's learning experience
- Provide enhanced recreational opportunities
- Provide a wider range of experiences than can be provided on the school site
- Promote independence of pupils as learners, and enable them to grow and develop in new learning environments
- Encourage tolerance and quality in relationships between all involved.



Educational visits are made available by individual year group, across year groups and, in some instances, across the whole school. Where there are limited places on a visit, places are allocated on a first come, first served basis.

Pupils are not barred on financial grounds from any courses or visits considered a necessary part of the curriculum or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school. When additional funding is necessary, the school will endeavour to source appropriate funds (see Finance section below).

Roles and responsibilities

Bourne Education Trust Trustees

As the employer of school staff, the trustees are aware of their responsibilities as employers in relation to educational visits, including under health and safety law.

Local Governing Committee

Governors, in their role to support and challenge, seek to enable and ensure high quality educational visits at the school. They ensure that:

- There is a policy for off-site visits and outdoor learning
- The policy covers charging for visits and activities in line with the school's charging and remittance policy
- There is a plan for emergencies
- The roles and responsibilities for all involved, including the headteacher and other staff, are clear
- There are formal notification and approval procedures for visits, with clearly identified roles and responsibilities
- There are procedures in place to monitor the safety, quality and effectiveness of off-site visits and outdoor learning.

Headteacher

The headteacher (in this document referred to as headteacher) is responsible for ensuring that educational visits comply with this policy and the national guidance on educational visits. A breakdown of responsibilities is included in [Appendix A](#) and there is a headteacher checklist included as part of the national guidance.

Operationally, activities and decisions may be delegated to other members of the school's leadership team and the EVC provides support and guidance to visit leaders. However, the headteacher must be sufficiently involved in the authorisation, planning and management of visits to be in a position to ensure that visits are conducted in line with policy and that the school's commitments, both financial and otherwise, are able to be met.

Educational Visits Coordinator (EVC)

The EVC must be competent – evidenced through qualification or, more likely, practical experience over many years. The EVC should be an experienced visit leader with sufficient



status within the school to guide the working practice of colleagues leading visits. The EVC must be trained to undertake the role.

The EVC's main role is to support and oversee planning so that well considered and prepared arrangements lead to well-managed, engaging, relevant, enjoyable, safe and memorable visits.

The EVC's key responsibilities are included in [Appendix B](#) and there is an EVC checklist included as part of the national guidance.

Visit Leader

The visit leader has overall responsibility for a visit. This includes the learning, development and supervision of the participants and the safety of all, including any other leaders and helpers. All educational visit leaders must be approved by the headteacher and must be specifically competent for the type of visit and for any activities they plan to lead (see national guidance 'Approval of Leaders').

The visit leader might hand over leadership of one or more activities to activity leaders or a third-party provider but retains oversight. There must always be a single designated visit leader and, should this change, there should be a clear handover.

The visit leader's key responsibilities are included in [Appendix C](#).

When working with an external provider, it is essential to avoid 'grey areas' of responsibility. Relative roles and responsibilities of school staff and provider staff must be clarified, and there must be a clear handover where there is a change of leader (see national guidance 'Using External Providers').

Should a provider run an activity in a way that causes concern, the visit leader should intervene at the first appropriate moment in a way that does not result in young people being put at greater risk.

Authorisation, planning and management

The national guidance recognises that visits can require either 'standard' or 'enhanced' planning and management, depending on the nature of activities involved, the characteristics of the group of students involved and the environment in which it will take place. Additionally, the Trust recognises 'routine' visits.

In the early planning stage, the visit leader, EVC and headteacher will agree whether the visit is categorised as **routine**, **standard** or **enhanced**. There are differences in the procedures set out for the authorisation, planning and management of visits depending on category as set out in [Appendix D](#) (routine visits) and [Appendix E](#) (standard and enhanced visits).

1. Routine visits

Some visits are sufficiently routine to the operation of the school that they are covered by standard, documented operating procedures. Examples of such visits might include pupils



walking to a weekly forest school, conducting fieldwork in the local neighbourhood, or a routine visit to a local church for an assembly.

Parental consent is likely to have been gained for routine visits on a pupil's admission to school, although this does not remove the requirement to notify parents of the visit in advance and to check that parents have given blanket consent.

Most off-site sporting fixtures are considered routine, but parental permission is required especially in relation to transport arrangements, so visit leaders must ensure that it is sought and received prior to the visit.

A template risk assessment may be used for all routine visits but must be reviewed and approved in advance of the visit to ensure that the nature of the group and any additional, specific risks or medical needs are considered.

Further information on classifying a visit as routine and on requirements for standard operating procedures for routine visits are set out in [Appendix D](#). Operating procedures must be reviewed regularly to ensure that they remain robust.

2. Standard visits

Standard visits are those which:

- Are usually not local to school
- May incur a cost to the school
- May require transport to be booked in advance
- Require specific parental permission

but where there is no residential element.

Procedures are set out for the authorisation, planning and management of standard visits in [Appendix E](#). Most actions set out in these procedures are assigned to the visit leader who must, at all stages, consult with the headteacher and EVC to ensure that each can discharge their duties as set out above and in [Appendix A](#) and [Appendix B](#).

3. Enhanced visits

These are visits which incur a level of cost which means that sufficient parental contributions must be received for the visit to progress, any visit with a residential element and any visit where the school involves a third party in the arrangements for and / or delivery of the visit.

The schools does not offer enhanced visits due to the age of the children attending the school.

Monitoring

The school monitors the following areas as they relate to educational visits:

- Health, safety and welfare
- Safeguarding
- The quality of provision



- The performance of external providers
- Financial risk.

The headteacher and EVC's role in monitoring educational visits is set out in [Appendix A](#) and [Appendix B](#). Completed, evidenced headteacher and EVC checklists, provided as part of the national guidance, ensure that the school has robust procedures and arrangements for safe, effective educational visits. Checklists are available to governors to aid their oversight and monitoring. Monitoring activities may include field observations and peer monitoring.

Induction and training

EVC

The school's EVC is selected on the basis of being an experienced visit leader (either in this school or elsewhere) with an aptitude for the role and sufficient status within the school to guide the working practice of others. Additionally, the EVC is required to attend training with a local authority or with Evolve and to refresh this training every 3 years. Copies of relevant training certificates should be kept on individuals' personnel files.

Visit Leaders

Visit leaders are selected by the headteacher or EVC based on being the right person to lead a specific group on a specific visit or activity in a specific environment.

It is important to ensure that there is succession planning to ensure that there are visit leaders trained to sustain a programme of visits in the future. Where a visit leader is less experienced, they may be supported in their role by a more experienced colleague by way of gaining experience. Such mentoring may be provided for any aspect of the role set out in [Appendix C](#). The most usual route for gaining the necessary experience, however, is for practical training and experience to be gained whilst an assistant leader on other visits.

Where a person is identified to oversee and support the visit leader, their name must be entered on the visit authorisation form once the headteacher has received explicit confirmation that they are prepared to undertake this role and to assume leadership of the trip as circumstances dictate.

Some activities or visits involve significant risk, such as certain sports and physical activities and activities involving the use of machinery, tools or hazardous substances. For such activities, leaders may be able to demonstrate their competence through holding an appropriate award or being 'signed off' by a competent technical adviser. If there is any doubt about a leader's competence, the headteacher will seek further advice from the Trust's Director of Operations. Copies of relevant training certificates should be kept on individuals' personnel files.



Risk management

Risk management involves reducing the risk inherent in a school visit to be as low as is reasonably practicable and deciding if this is acceptable in order to gain the benefits from that visit. At all times, risk management activities must be proportionate to the risks and should not impose unnecessary bureaucracy.

Following national guidance and operating in accordance with this policy creates a solid foundation of risk management for the school's educational visits. In addition, visit leaders must take the following actions further to reduce risk:

- Review and amend as appropriate generic risk assessments for routine and some standard visits, or draw up visit-specific risk assessments for other standard and enhanced visits
- Consider carefully the characteristics of individuals and the group attending the visit, identifying and managing specific risks associated with either
- Involve all staff, and pupils where appropriate, in planning and preparation of visits including risk management and risk assessments
- Include specific local hazards and how the associated risks should be controlled (e.g. specific safe road crossings or managing proximity to water)
- Include any minimum requirements for staff ratios, depending on the nature of the group and the specifics of the visit
- Include transport arrangements in the assessment of risk.

Visit leaders must be trained in risk management and risk assessment or supported in these activities. All risk assessments must be countersigned by the headteacher, these are stored electronically in staffroom/staff/School Trips and Visits/Risk Assessments and shared in advance with all adults accompanying the visit and with students at an age-appropriate level.

For all standard and enhanced visits, visit leaders must manage the visit using Evolve, the school's visit management software. This supports the visit leader to manage risk, including accessing advice from, and the authorisation of, an external adviser.

Decisions about the number of leaders required, and staffing ratios, is informed by risk assessment (see national guidance 'Group Management and Supervision' and 'Ratios and Effective Supervision'). Consideration must be given to the mix of competencies needed to fill various roles on the visit.

Planning for a visit should include consideration of the possibility of the visit leader or an activity leader becoming incapacitated. This might be caused by illness, injury or being required elsewhere (such as to look after a sick child).



Preliminary visits

Accreditations and other sources of information may provide essential assurances but are not a substitute for a preliminary visit at which issues may be clarified face-to-face. The school recognises that, wherever reasonably practicable, it is good practice to carry out a preliminary visit to unfamiliar facilities and providers. The cost of this is built into the visit budget.

Preliminary visits allow the visit leader to address a range of questions such as:

- Does the provider and/or facilities meet the requirements for the visit?
- Are there any particular hazards which need to be considered in visit planning and preparation?
- What options are available if physical conditions differ from the pre-visit (e.g. daylight, water level, temperature and weather, underfoot conditions)?
- Is sufficient known about the provider, facilities and activities to give confidence during visit planning?
- Is it possible to cater for the full range of group needs, including any special needs or for those with any other protected characteristic?
- Will specialist equipment be required?
- Are there any staff training needs?
- Will participants need to be prepared or trained?

Photographs taken on a preliminary visit are a useful aid to briefing the visit leaders, parents and participants.

Where a preliminary visit is not reasonably practicable, information should be sought from reliable sources such as the Outdoor Education Adviser (via Evolve), colleagues, similar groups that have recently visited the venue or used the facility or provider, or reputable organisations such as tourist boards.

Volunteers

The school welcomes volunteers to support some educational visits. Indeed, some visits can only go ahead if sufficient volunteers are available to allow ratios to be maintained.

Visit leaders, in discussion with the headteacher and EVC, will determine whether volunteers are needed and the roles which they will take during the visit. Volunteers are used in two roles:

- As activity leaders who may therefore have delegated responsibility for a group from the visit leader, or



- As an accompanying adult.

Volunteers who are also activity leaders, must:

- Be engaged for, and be approved, in that role by the headteacher or EVC
- Have an enhanced DBS check as this is regulated activity
- Be competent to lead the activity and understand their role to the same standard as would be expected of a school employee or contractor taking on this role
- Receive appropriate training
- Be briefed in advance to ensure that they understand their role, their part in managing the associated risks, the characteristics of the group they will be responsible for
- Understand how to deal with an emergency should it arise (see below), and
- Understand the behaviour code for the visit and be able to ensure that it is followed by all participants.

In line with the school's Safeguarding and Child Protection Policy and Keeping Children Safe in Education Part 3, supervised volunteers are not in regulated activity, so an enhanced DBS check is not a prerequisite. However, it may be advantageous, in the case of an emergency, to be able to call on any volunteer to take responsibility for a group without supervision. For this reason, it is preferable to have carried out an enhanced DBS check for all volunteers accompanying educational visits and to brief them for such circumstances in advance.

Emergency procedures and incident reporting

Deciding what to do in the event of an emergency is part of the planning and preparation for every off-site visit at the school. Where visits extend beyond the length of the school day, plans must account for this.

Emergencies can be considered in four categories, depending on the nature of the incident:

- **Incident:** A situation which is dealt with by the visit leadership team. This may involve some communication back to school or parents and some support from staff at school, but the visit leader remains in control and is able to cope
- **Emergency:** An incident where the visit leadership is unable to cope and which requires the school's Emergency Plan to be initiated. The school leaders take control of the situation, supporting the visit leader remotely, and are able to cope
- **Critical Incident:** An incident which is beyond the scope of the school's Emergency Plan to manage in-house and which requires intervention from Bourne Education Trust or the local authority in addition to the school's Emergency Plan procedures
- **Major Incident:** An incident which (if in the UK) is declared as a major incident by the police, who will take control and where the relevant Local Authority's Major Incident Plan is initiated or where (if outside the UK) the relevant authorities take



control. The school, in operating its Emergency Plan, and the Trust's senior leaders will coordinate with the police or other authorities.

A duty officer will be identified for all educational visits – even routine visits – as emergencies may occur at any time in any circumstance. The duty officer will support the visit leader and group in the event of an emergency, critical or major incident. They must be an experienced, senior member of staff who has sufficient authority to be able to offer support and guidance in difficult circumstances.

The duty officer must have full and complete details of the journey, including contact details for participants and staff. The duty officer must be available at all times for the visit leader until notified that the group has returned safely.

For any emergency, critical or major incident, the visit leader will:

- Ensure that the party is safe from further danger
- Contact the local emergency services immediately and follow their advice
- Deploy other staff and adults as effectively as possible in continuing to ensure the welfare of the group
- Contact the duty officer who will contact the headteacher.

Surrey schools

- In the event of the duty officer being unavailable, contact the Surrey County Council Emergency Planning Officer (tel 07831 473039) quoting 'Operation Duke'
- In the event of the duty officer being unavailable, contact the headteacher.

Operation Duke is the name of Surrey's emergency response scheme. In the event of a serious accident or incident, it provides a network of support and is the means of involving senior officers within the LA who have been trained to assist. Visit leaders and duty officers will always have immediate access to an emergency reference card showing how to get support under Operation Duke. They must call on Operation Duke:

- Where an accident leads to a fatality, serious or multiple fractures, amputation or other serious injury
- There are circumstances in which a party member might be at serious risk or subject to serious illness
- There is a situation where the press or media might be involved.

[Appendix F](#) contains a summary of Surrey's Operation Duke and practical guidance for visit leader and duty officers in the event of a serious incident.

The headteacher will inform the BET executive team who will support the school with the management of any serious accident or incident.

[Appendix H](#) contains practical guidance for visit leaders and duty officers in the event of a serious incident.

Emergency reference cards

Emergency cards must be taken on every educational visit. Templates are available:



Appendix I: Surrey schools

Behaviour

The school expects that students behave in line with the school's behaviour policy at all times, including when part of an educational visit.

As part of the work to manage risks, visit leaders will have considered the characteristics of the group and any specific measures required to keep them safe. How pupils behave can have an impact on how effectively risks are managed, so it is vital that pupils are briefed in advance on any specific risks and/or visit-specific rules which may be necessary. For example, there may be times when pupils are supervised more remotely so they must be clear where 'out-of-bounds' limits are and how to contact or locate an adult at any time.

Behaviour expectations should be explained to pupils and, as appropriate parents, before a visit, so reducing the opportunity for misunderstanding both expectations and the sanctions that may be invoked should a pupil misbehave.

For residential visits, both parents and pupils may be asked to sign a 'behavioural contract' with parents accepting responsibility for removing pupils in given circumstances. Additionally, it will be made clear in advance of a visit what pupils may bring by way of games, food, mobile phones, cameras or other electronic devices.

Inclusion

All pupils are given the opportunity of benefiting from participation in a wide range of educational visits, irrespective of social background, culture, race, gender, gender assignment, religion or belief, sexual orientation or differences in ability and disabilities. The school has a presumption of entitlement to participate with accessibility, which we enable through direct or realistic adaptation or modification so that they are able to participate with their peers. We recognise that it is unlawful to treat an individual with a protected characteristic less favourably and to fail to take reasonable steps to ensure that such an individual is not placed at a substantial disadvantage without justification.

We will take every reasonable effort to find a venue and activities that are both suitable and accessible and that enable the whole group to participate fully and be actively involved. We will aim to balance providing the best possible educational outcomes for all pupils, whilst meeting the particular needs of individuals. Sometimes it may not be possible to make reasonable adjustments to include a young person in a specific visit or activity, nor to provide the whole group with a suitable alternative, perhaps because of a severe disability.

If it is genuinely impossible to find a suitable way of including everyone, we will not deprive the rest of the group of worthwhile opportunities. However, if a young person is excluded from a visit or activity, even for good reasons, the impact of this will be considered, and consideration given to the provision of a suitable alternative. Such decisions will be documented so as to prove the reasons were other than unfair discrimination.



When adjustments are considered so that, for example, a disabled pupil can be included, these should not invalidate the planned purpose of the activity. We recognise that it is a serious decision to exclude an individual from an educational visit. Such a decision will only be made after consultation with those who have responsibility for the pupil, including (as appropriate) the headteacher, visit leader, class teacher, parents, any support staff, any third-party provider, and possibly their GP.

In making the decision, we will also take into account that expectations of staff must be appropriate, so that what is required of them to include a particular student is within their competence and is reasonable.

There is national guidance to support visit leaders planning educational visits which include transgender pupils ('Transgender Young People on Educational Visits').

Exclusion on the grounds of behaviour

If a pupil has a behaviour difficulty that is associated with a protected characteristic, then it is possible that the Equality Act applies and, if so, the principles set out in the inclusion section of this policy will apply.

It may be reasonable to exclude a pupil where their behaviour presents a significant, unmanageable and unacceptable risk to the health, safety and welfare of either themselves, or other members of the group, or the leaders. When a pupil is excluded on these grounds, we will consider providing alternative ways of achieving the same learning outcomes.

Before determining whether to include or exclude a pupil on the grounds of their behaviour, the following points will be considered:

- Identifying the issue at the earliest stage of planning
- Involving all interested parties
- Establishing a behaviour management plan with agreed action points that may enable inclusion on the visit
- Establishing behaviour targets and timescales to be met to allow inclusion, or trigger a decision to exclude
- Providing an additional adult, such as a parent or support worker, with a specific brief to manage behaviour issues
- Ensuring that what is expected of staff is reasonable and within their competence
- Recording this process.

Insurance

Each BET school's insurance policy covers the school's educational visits, including some winter sports, meaning that additional insurance is probably not required from external providers. Visit leaders should check the school's insurance policy to ensure all planned activities are covered and that the levels of cover provided are adequate. Attention should also be given to policy exclusions and any policy excess. Visit leaders must ensure, however, that external providers hold a minimum of £5M public liability insurance.



Finance and financial approval for the visit

Where educational visits incur a cost, the visit leader must complete the school's Educational Visit Budget and Authorisation Form ([Appendix L](#)).

The following principles apply:

- All charges or requests for contributions shall be in line with the Charging and Remissions Policy. This defines 'voluntary contributions' and sets out what the school may charge parents for under the heading of 'optional extra' activities
- Costs will be kept as low as possible
- Any charges relating to staff and other supervising adults will be included in the 'voluntary contribution'
- If insufficient voluntary contributions are made, the trip may have to be cancelled
- Payments may not be made in advance of sufficient funds being available from voluntary contributions, therefore payment schedules must be set to enable this. Should a deposit be required to secure a booking before voluntary contributions are sought, approval must be obtained from the headteacher, recognising that cancellation would result in a loss which the school would have to bear
- No pupil may be deprived of an educational visit if it is an essential part of the curriculum and in such cases the school fund must bear the cost. Clearly this can only happen in a limited number of cases.
- Visits can lead to pressure (on parents' purses) and stress (on staff and students). All visits should follow an agreed pattern and be part of the overall academic planning cycle.

Visit leaders must ensure that, before committing to a visit, contracts with third parties are scrutinised and understood. Different operators have widely varying 'small print' terms and conditions which relate to cancellations, postponements and costs if the number of attendees changes. Visit leaders should be cautious when in dialogue with third party providers not to enter into a contract unwittingly, for example through the exchange of emails.

Visit leaders must arrange for due diligence to be carried out in relation to third parties.

Visit leaders must also clarify who becomes liable for what in the eventuality that one or more participants withdraw from the visit – and ensure that parents are provided with a clear and detailed statement of their liability if they or their child changes their mind.

Where there is any doubt, visit leaders must take advice from the school business manager or the Trust's Operations Director.



Data protection

Information about staff and participants, including recognisable photographs, contact details and dietary/medical information is subject to data protection law. National guidance provides more information relevant to educational visits (see national guidance 'Participant Information and Data Protection'). It is vital for the health, safety and welfare of those involved in visits that relevant information is available to leaders and external providers for planning activities, and in the event of an emergency. This is allowed within the Trust's policies for information sharing.

Any contact or medical information taken off the school premises must be kept securely at all times and never left unattended, as loss could represent a serious data breach. When communicating with parent(s)/carer(s) by email, contact details should be withheld from the group by using BCC. Permission should be gained from each individual before contact lists are circulated.

Appendix A: Headteacher responsibilities

In line with national guidance, the headteacher must ensure that:

- All activities and visits comply with this policy and the national guidance on educational visits
- Arrangements are in place for the local governing committee (LGC) to be informed of visits. The LGC will not be regularly informed of routine or standard visits, although these may be discussed when reviewing curriculum plans. The chair of governors' approval will be sought for all residential and overseas visits.
- A suitable member of staff is designated as the educational visits coordinator (EVC) and the EVC meets the requirements set out in the national guidance and is trained (see national guidance 'Approval of Leaders')
- The school has, and makes use of, expert advice as needed, such as from a competent outdoor education adviser
- All leaders of educational visits are appropriately competent, confident and accountable to carry out the responsibilities they are allocated (see national guidance 'Approval of Leaders')
- The EVC is supported in ensuring that all activities and visits are effectively supervised with an appropriate level of leadership (see national guidance 'Ratios and Effective Supervision')
- The EVC is supported in ensuring that information has been shared with parents and consent has been given if required (see national guidance 'Parental Consent')
- When taking part in a visit or activity personally, all members of the visit leadership team are clear about the headteacher's role (if not leading the visit, the headteacher

must follow the instructions of the designated visit leader, who has sole charge of the visit)

- Suitable safeguarding procedures are in place, including appropriate vetting of all adults including volunteers, helpers and visitors (see national guidance 'Safeguarding' and 'Vetting and DBS checks')
- Adequate time has been assigned for leaders to organise activities and visits properly
- There is a succession-planning culture in place to ensure sustainable activities and visits and the development of competent leaders and EVCs
- Arrangements have been made for the medical and special educational needs of all participants and staff
- Inclusion issues are addressed (see national guidance 'Inclusion')
- Suitable transport arrangements are in place (see national guidance 'Transport – General Considerations')
- Appropriate insurance arrangements are in place (see national guidance 'Insurance')
- Visits have contingency plans to deal with changing circumstances
- Best value is obtained, with consideration given to financial management, choice of external providers and facilities
- Any charges made to parents are within legal requirements and in line with the school's charging and remittance policy (see national guidance 'Charging for School Activities')
- Appropriate procedures are in place to account for the visit's finances, including understanding how the school will be affected in the event of cancellation or pupils withdrawing
- Risk management is proportionate, suitable and sufficient (see national guidance 'Risk Management – an Overview').
- Appropriate checks have been made and assurances obtained, a clear contract is in place setting out what the contractor is to provide, and the provider holds sufficient indemnity insurance (see national guidance 'Selecting External Providers and Facilities')
- There are suitable emergency procedures in place for each visit (see national guidance 'Emergencies and Critical Incidents – Guidance for Establishments')
- Details related to visits (including personal details of both participants and leaders) are accessible at all time to designated 24/7 emergency contacts in case of a serious incident
- Serious incidents are reported to the Trust's Operations Director, meeting the requirements of RIDDOR
- All visits are reviewed, addressing issues raised by any incident and informing future visits
- Visits are evaluated against their aims and objectives and are included within the process of school self-evaluation.



Appendix B: EVC key responsibilities

The EVC's key responsibilities are to:

- Be a champion for all aspects of educational visits and outdoor learning
- Challenge colleagues across all curriculum areas to use visits and outdoor learning effectively to provide a wide range of outcomes for students
- Support and oversee planning so that well considered and prepared arrangements lead to well-managed, engaging, relevant, enjoyable, safe and memorable visits
- Mentor visit leaders
- Ensure that planning complies with the school's requirements and that arrangements are ready for approval within agreed timescales
- Support the headteacher and governors in approval decisions so that all those with responsibility have the competence to fulfil their roles
- Ensure that all activity is reviewed, good practice is shared, and that any issues are followed up
- Ensure that activity is evaluated
- Keep the senior leadership team and governors informed about educational visits.



Appendix C: Visit Leader key responsibilities

Visit leaders, in fulfilling their role, must:

- Be able to use the chosen environment or venue to provide a wide range of learning or developmental outcomes
- Liaise with the EVC to ensure that the visit has clear aims, is planned to balance benefits and risks, and that all leaders and helpers accompanying the visit meet the school's requirements
- Ensure that there is effective supervision
- Take a lead on risk management, involving other leaders and participants
- Define the roles and responsibilities of other leaders, helpers and participants to ensure effective supervision throughout the visit, appointing a deputy wherever possible
- Ensure that activity leaders are competent and confident to lead their planned activities and are approved to do so if this is necessary (e.g. for adventure activities)
- Ensure that any child protection issues are addressed (including ensuring that adults are appropriately vetted and checked)
- Provide relevant information to other leaders including the aims and how they can contribute to achieving these
- Ensure that informed parental consent has been obtained as necessary
- Ensure that arrangements for dismissing students at the end of the visit are established and followed, especially if the pupils will be dismissed away from the school site
- Provide relevant information to parents and participants and arrange pre-visit information meetings where appropriate
- Make sure that there is access to first aid at an appropriate level
- Take measures to ensure effective supervision is not compromised if the visit leadership team includes someone with a close relationship to a member of the group
- Ensure that all leaders and any third party providers have access to emergency contacts and emergency procedure details
- Review all aspects of the visit, both during and after the event
- Liaise with the EVC about the evaluation of the visit
- Report any accidents, incidents or near misses.



Appendix D: Routine educational visits

When deciding to categorise a visit as routine, the headteacher and EVC should be assured that the visit has:

- Clearly defined geographical boundaries
- Clearly defined activities
- Leaders who are competent, approved and trained
- Procedures are in place to manage any significant risks identified
- Parental consent would be covered by the signed statement on a pupil's admission
- Appropriate transport if necessary
- First aid provision.

Standard procedures must ensure that on the day:

- There is sufficient competent leadership to deal with both the expected and the unexpected
- There is an emergency contact at the school
- Appropriate people know who has gone where, with whom, and when they will return
- Consent, if required, has been given
- Visit leaders have appropriate information about the individual needs of participants so that they can make specific arrangements for that group
- Effective communication between the school and the leaders is possible.

If, on the day, there is anything non-standard about the group or the circumstances, it is important that plans and procedures are reviewed and adjusted as necessary.



Appendix E: Standard visits form

Name of visit:	Visit date(s):	Group:			
Visit leader:					
Activity: HT = Headteacher SBM = School business manager EVC = Educational Visits Coordinator COG = Chair of Governors EVA = Educational Visits Advisor		Lead by	Approved / signed off by	Requirement	Date completed
In advance:					
■ Visit leader approved to take sole responsibility for the visit (or, where required, name of person who has agreed to oversee the visit and to assume leadership of the trip should circumstances dictate). Name of person overseeing trip as appropriate: _____			HT (Person agreeing to oversee visit)	✓	
■ Agree purpose of visit and its aims with school leadership team.		Visit leader	HT or EVC	✓	
■ Chair of Governors to approve if visit is residential or overseas.		Headteacher	COG	✓	
■ The school's pre-authorisation form is completed and agreed with the school business manager in consultation with the headteacher where there is a substantial financial commitment. This must take place before the school enters into any financial commitment. When there is any doubt, visit leaders must take advice.		Visit leader	HT and SBM	✓	



<p>At a minimum, the following should be established:</p> <ul style="list-style-type: none"> What are the cancellation charge arrangements if the entire trip is cancelled or if individual students drop out? What the payment schedule is for contributions from parents, ensuring that there will be funds available to cover staged payments to third parties ? What is the trading name, and parent company name, of the company with whom any contract will be taken out? What financial security or bonding does the parent company offer? If foreign travel is involved, what are the contractual arrangements to manage currency fluctuations? What charges are made for alterations to booking arrangements and who will pay any additional charges? What events does the company include under Force Majeure? 				
<ul style="list-style-type: none"> Suitable access arrangements are confirmed for any pupils with additional needs. 	Visit leader	EVC	✓	
<ul style="list-style-type: none"> Visit leader agrees the visit date, books in school diary, <checks availability of the minibus>. 	Visit leader	EVC	✓	
<ul style="list-style-type: none"> A pre-visit is conducted as advised by the EVC or headteacher, identifying risks to be included in the risk assessment. 	Visit leader	EVC	Depends on circumstances	
<ul style="list-style-type: none"> Books the visit with local provider or venue with a follow-up email, ensuring a confirmation by return email. 	Visit leader or admin team	SBM	✓	
<ul style="list-style-type: none"> Books transport as required. 	Admin team	SBM	Depends on circumstances	



<ul style="list-style-type: none"> Visit leader prepares a risk assessment to reflect the characteristics of the group involved which must be countersigned by the headteacher. This must be in good time for it to be reviewed and amended as needed. 	Visit leader	HT	✓	
<ul style="list-style-type: none"> Visit leader/EVC determines the staffing/adult ratio required, identifies the school staff who will accompany the visit and the number of volunteers as appropriate, and agrees this with the headteacher or EVC, confirming arrangements with any other staff members impacted by this decision. 	Visit leader / EVC	EVC or HT	✓	
<ul style="list-style-type: none"> Visit leader enters visit onto Evolve (standard or enhanced visits) and follows through the approval procedure – EVC/headteacher/educational visits advisor – depending on the nature of the visit. 	Visit leader	EVC / HT (EVA)	✓	
<ul style="list-style-type: none"> Finance team set up payment schedule on the schools payment system for parents in advance of letters being sent to parents. No cash or cheques to be accepted by teaching staff. 	Visit leader and finance team	SBM	✓	
<ul style="list-style-type: none"> Visit leader prepares a letter for parents – including the agreed statement on financial contributions from parents where appropriate. The visit letter must set out parents' liabilities in the case of cancellation or should they subsequently choose for their child(ren) not to participate. The letter must also indicate the payment schedule for subsequent staged payments where applicable and any non-refundable elements. The letter must be in line with the Charging and Remissions Policy. If there is any doubt, visit leaders must take advice. 	Visit leader	SBM to check financial statements EVC for visit logistics	✓	
<ul style="list-style-type: none"> As all pupils must have permission to attend, the visit leader must check the return of permission slips or that parents signed to pre-authorise local visits on admission. 	Visit leader	EVC	✓	



▪ Visit leader must ensure that school caterers are informed with 10 days' notice if lunchtime arrangements are impacted and with arrangements for packed lunches if needed.	Visit leader	SBM	✓	
▪ Visit leader must ensure that any sessions involving external providers scheduled for the time of the visit are cancelled or reallocated (e.g. peripatetic music lesson, sports coach lessons).	Visit leader	EVC	✓	
▪ Where there is a cost to the visit, the admin team monitor receipt of money. Where appropriate the headteacher will identify funds to support individual students who are exempt from payment. If there are insufficient parental contributions to cover costs, the headteacher will decide whether to subsidise or cancel the visit.	Visit leader	SBM unless there is an issue, then HT	✓	
▪ Finance team to obtain sterling, foreign currency or pre-paid currency card as needed. Two weeks' notice is required for cashing a cheque and to complete a foreign exchange (Euros, etc).	Visit leader and finance team	SBM	Depends on circumstances	
▪ The finance team will pay invoices having confirmed that sufficient funds are available and the visit is to go ahead.	Finance team	SBM	✓	
▪ Visit leader identifies whether or not there is a need for group/individual passport(s) and visas and applies as appropriate	Visit leader	EVC	Depends on circumstances	
Visit:				
▪ Visit leader reviews risk assessment prior to the visit taking place, amending in the light of any changes of circumstance or level of risk. The headteacher must sign off any changes. The risk assessment must be shared with all adults accompanying the visit, explaining the roles in controlling any identified risks.	Visit leader	HT	✓	



▪ Visit leader and/or class teacher briefs pupils about behaviour expectations and about their role in controlling any identified risks.	Visit leader	EVC	✓	
▪ Visit leader ensures that medication for pupils or adults on the visits is taken on the trip, and that there is an agreed procedure for administering and recording.	Visit leader	EVC	✓	
▪ Visit leader checks in advance that the school's mobile phone is charged, has credit and that the phone remains switched on and monitored throughout the visit.	Visit leader	SBM	✓	
▪ Visit leader checks in advance that a fully stocked medical kit is available and that it is taken on the visit	Visit leader	SBM	✓	
▪ Visit leader takes an attendance register prior to departure, handing it to the attendance officer	Visit leader		✓	
▪ Visit leader calls the school on arrival at the venue, on departure and if there are anticipated changes to the schedule during the visit	Visit leader		✓	
▪ Visit leader is responsible for evaluating the visit on return, liaising with the EVC	Visit leader	EVC	✓	



Appendix F: Surrey schools – emergency procedures

In the event of an emergency, critical or major incident, contact the school's duty officer immediately, or, if the duty officer is not available, contact the SCC Emergency Planning Officer - Tel: 07831 473039. If you call the SCC Emergency Planning team, the call will be answered by:

- The SCC Emergency Planning Officer (in person) – quote 'Operation Duke' or
- An answerphone – quote 'Operation Duke'. Leave a message and your number. The call will be returned within 5 minutes, or,
- A messaging service – quote 'Operation Duke'. Leave a message and your number. The call will be returned within 5 minutes.

In most cases the caller will speak to someone immediately. The answerphone and message service are there in the event of the Emergency Planning Officer being in charge of a vehicle at the time the call is made.

When speaking to either the school's duty officer or the Emergency Planning Officer, you will need to give the following information:

- Quote 'Operation Duke'
- Your full name
- The telephone number you are calling from
- Name of group involved
- Exact nature of the incident
- Is a fatality involved? Has it been confirmed? By whom?
- Full name(s) and age(s) of injured person(s)
- Exact nature of injuries
- Whether local police or emergency services have been informed
- Whether any next of kin have been informed, if so, how
- If contacting Emergency Planning Officer, name and number of unobtainable school's duty officer.

Next steps and general advice

- Parents and relatives will naturally be anxious to establish what is happening, but try to prevent party members (staff or young people) from telephoning home until after you have made contact with your school's duty officer and this has been agreed. (Given the proliferation of mobile phones this will be difficult, but is important, as incorrect information and rumour will make the situation worse).
- Do NOT speak to the press or media. Refer enquiries to the local emergency services handling the incident on the ground and promise that 'an official statement will be made through the County Council's Press Officer as soon as possible'.
- Do NOT admit liability of any sort to anybody.
- Do NOT allow anyone, apart from medical services, to see any party member without an independent witness being present.
- Retain any equipment involved in an unaltered condition.



- Keep a written record of all that happens.
- Be as compassionate as possible, with anyone involved.
- Remember that no one, unless they are in a relevant official capacity, has the right to see anyone who does not wish to see them.
- If you change location, remember to let your school's duty officer have the new telephone number at which you can be contacted.

Finally, remember that all situations are different. Your school's duty officer or a senior officer from the Local Authority will make themselves available to offer you advice and support – use them as much as you need.

For duty officers and headteachers when Operation Duke is initiated

In the event of a serious accident or incident involving a group on any form of off-site activity, it is paramount that the visit leader should receive as much advice and support as they need.

Serious incidents are fortunately rare – this can, however, lead to complacency, which must be guarded against. Therefore, you will need to 'think on your feet'. This could be difficult under pressure and the following guidelines will help.

If your school's duty office is not the headteacher, the duty officer should update the headteacher at the first opportunity.

Be prepared:

- You must have comprehensive details about the group and the journey. This will include contact and medical details for all involved (including staff and volunteers) and full details of the itinerary, addresses, travel/coach company, etc.
- You must have immediate access to these procedures, and the information and means to use them, at all times.
- Make sure you are familiar with all the guidelines for off-site activities.

Answering the emergency call

You will need to gain and record the following:

- Name of group
- Name of visit leader/caller
- Telephone number the caller is speaking from
- What happened
- To whom
- Where
- When
- What has happened since.

If a fatality is involved or suspected:

- Has this been confirmed?
- By whom?
- Have any next of kin been informed? In the event of a fatality it will normally be the police who contact the next of kin.



General advice

Advise the visit leader to follow instructions from the local police/emergency services, and, unless they specifically request otherwise, your advice to the visit leader should be to:

- Keep the party together
- Co-ordinate any contact with parents or any outside bodies
- Refer media attention to the police or County Council Press Officer – do not answer questions
- Remain available: If it is necessary for the party to change location, they must advise you of the new telephone number.

Next steps

In office hours:

Telephone the Contact Centre: 08456 009009 and explain that this is an 'educational visits emergency' and you wish to contact a Senior Education Officer.

Outside office hours:

Telephone the SCC Emergency Planning Officer on 07831 473039 (see guidance for party/visit leaders).

A senior officer, trained to deal with off-site emergencies, will contact you, and you should give them all details, including your telephone number. The senior officer will then contact the following:

- Duty Press Relations Officer
- The headteacher(s) of the group(s) involved, where applicable.
- Unit head(s)
- Other senior officers, to establish a support team.

Consult with the senior officer how best parents might be informed. The senior officer can advise on the best way to inform parents, if the local emergency services have not already undertaken to do so. It may be better for the senior officer or another colleague to do this, as you must remain available for the visit leader to contact.

Maintain a written record of events, including the times of telephone calls, etc.



Appendix G: Surrey schools - Emergency Reference Cards

In all cases, three copies of the following text, copied back to back onto cards, should be made available for all educational visits. Other local useful contacts may be added, but care must be taken to ensure that the text is large enough to be easily read in an emergency.

IN CASE OF FATALITY OR EMERGENCY

Inform local emergency services (Dial 999 or 112 in Europe)

Inform duty officer: Name:
 Work telephone:
 Home telephone:
 Mobile telephone:

If the duty officer is unavailable, call SCC Duty Emergency Planning Officer – **07831 473039**

You will be answered by either:

- The SCC Emergency Planning Officer – quote OPERATION DUKE or
- A duty answer phone – quote OPERATION DUKE, leave a message and your number.
You will be called within 5 minutes or
- A message service – quote OPERATION DUKE, leave a message and your number.
You will be called within 5 minutes.

DO NOT SPEAK TO THE PRESS OR MEDIA. Refer to County Press Officer:

Daytime Tel: **0208 541 8996/9962** Out of hours Tel: **0208 541 7920**

Try to prevent staff and young people phoning home until contact has been made with your Duty Officer or Emergency Planning Officer.

When contacting the Duty Officer or Emergency Planning Officer, be prepared to give the following information:

- Quote 'OPERATION DUKE'
- Your full name
- The telephone number you are calling from
- Name of group involved
- Exact nature of the incident
- Is fatality involved? Has it been confirmed? By whom?
- Full name(s) and ages of injured person(s)
- Exact nature of injuries
- Whether local police or emergency services have been informed
- Whether any next of kin have been informed. If so, how?
- If contacting the Emergency Planning Officer, name and number of the unobtainable Duty Officer.



Appendix H: Educational visits budget and authorisation form

Trip costing template

Description	Category	Quantity	Unit cost	Amount
Coach	Transportation			0
Rail	Transportation			0
Driving (miles, cost/mile) for pre-trip visit	Transportation			0
Parking (days, cost/day) for pre-trip visit	Transportation			0
Cost of activities/ workshops (external provider)	Activities			0
Tickets for pupils	Entertainment			0
Staff costs (extra hours worked to attend trip)				0
Cost for volunteers to attend if entrance cost				0
				0
Sub total				0
Bank/Parent Pay charges	Other			0
Total				0

***** Please adjust if costings dependent on numbers *****