



Educational visits policy and procedures

Reference: D10
Version number: 1.0
Last updated: September 2024

Summary of changes and reviews

Version	Date	Summary of amendments	By
1.0	21 Aug 22	Initial version, replacing elements of the now superseded Travel policy	SB
1.1	28 Sep 24	Amendments made to responsibilities – Deputy Head to Director of Operations	NW
1.2	9 Sep 25	Amendments made to responsibilities – Director of Operations to Deputy Head Pastoral	SB



Contents

Introduction.....	4
Accountability and responsibility	4
Types of external visits	4
Educational visits	4
Responsibilities.....	4
Deputy Head Pastoral.....	Error! Bookmark not defined.
External visits coordinator (EVC)	5
Activity leader.....	5
Process.....	5
Parental consent.....	5
Frequent of educational visits	5
Residential activities.....	5
Responsibilities	5
External visits coordinator (EVC)	5
School Business Manager	6
Activity leader.....	6
Process.....	6
Parental consent.....	6
Weekend boarding activities.....	6
Responsibilities.....	6
Head of boarding.....	6
Activity leader.....	7
Process.....	7
Parental consent.....	7
Risk assessment.....	7
General	7
Process.....	7
External provider risk assessments	8
Learning Outside the Classroom Quality Badge	8
Licences	8
Providers’ public liability insurance.....	9
Self-run activities.....	9
Supervision and staff ratios.....	9
First aid	9
Water sports.....	9
Reviewing the risk assessment during the activity.....	9



Audit of risk assessments	9
Communications.....	10
Training.....	10
Volunteers	10
Behaviour expectations of staff and pupils	10
Inclusion.....	10
Charging and insurance	11
Evaluation	11
Appendix 1 – Educational visits process and checklist.....	12
Appendix 2 – Residential activities process and checklist.....	15
Appendix 3 – Weekend boarding activities process and checklist.....	17
Appendix 4 – Considerations for risk assessments	19
Areas of risk to be considered	19
Confirm systems and controls in place.....	19
Additional factors to consider	19
Appendix 5 – Visit checklist	21
Appendix 6 – Visit evaluation	23



EDUCATIONAL VISITS POLICY AND PROCEDURES

Introduction

Educational visits are an integral part of the Hatherop education. Successful trips provide memorable learning experiences and enhance the children's education in ways that are not possible in the classroom. The school is committed to providing school visits as a positive tool to develop pupils' independent, investigative learning, and to build their experience of the local and wider world.

This policy outlines the procedures that must be followed by all staff to ensure the successful execution of the trips, ensuring full compliance with statutory regulations and best practice, and a worthwhile and engaging activity for the pupils.

Accountability and responsibility

Accountability for all educational visits lies with the Headmaster. Responsibility for coordinating all activities is delegated relevant to the activity type, and is outlined below. The responsible individual will be selected by the Headmaster, as somebody who:

- is an experienced visits leader;
- has the status to be able to guide the working practices of other staff;
- is confident in assessing the ability of other staff to lead visits;
- is confident assessing outside activity providers;
- is able to advise the Headmaster when he is approving trips; and
- has access to training, advice and guidance. (This includes access to the OEAP website, at <https://oeapng.info>).

Types of external visits

All external visits are categorised as follows:

- **Educational visits.** This includes non-routine off-site activities, such as a class trip or whole-school visits to the pantomime. It does not include external visitors running activities within the school (with the exception of those listed above), which is covered under the schools A10 Visitors and Volunteers Policy.
- **Residential activities.** This includes any overnight trips, such as the French Trip and outdoor activities in partnership with Cumulus Outdoors. It also includes camping activities and externally-organised bush craft activities on site (such as Cumulus activities), but does not include routine Forest School activities.
- **Weekend boarding activities.** This includes all non-routine weekend boarding activities, whether that is an offsite visit or activity on site or externally-provided activity within the school grounds. It does not include school-led activities on site.

Routine visits, such as sports trips and swimming, are not included within the scope of this policy.

Educational visits

Responsibilities

Deputy Head Pastoral

The Deputy Head Pastoral is responsible for ensuring that all educational visits confirm to the wider curriculum and provide academic value and integrity.



External visits coordinator (EVC)

The EVC is responsible for the coordination of all educational visits.

Their responsibilities are as follows:

- Responsible to the Deputy Head Pastoral, ensure that all year groups have an appropriate number of affordable activities (see guidance below) throughout the year, deconflicted with other calendar commitments, that are of sufficient academic rigour and appropriately linked to the curriculum.
- Provide a single point of contact to support and advise activity leaders on the planning and conduct of activities.
- Ensure all compliance obligations are met during both the planning and conduct of the activities. This includes:
 - Risk assessments have been completed, checked to ensure that they are sufficiently rigorous, and filed appropriately. This includes confirming that staff to pupil ratios are appropriate.
 - If no staff member has been to the venue before, that a recce of the venue has been completed in advance of the visit.
 - A post-visit evaluation has been completed, which includes an assessment of the activity (to determine whether it should be repeated in future years, or recommend any changes) and a review of the risk assessment, to inform future risk assessments when this or similar activities are repeated.
- Ensure that activity leaders have completed all necessary administration requirements, including the completion of a trip costing form, and arranging packed meals, transport and medical requirements.

Activity leader

Each activity will have a nominated activity leader. They are accountable to the Headmaster for planning and running the educational visit.

Process

The process for the organisation of educational visits is at Appendix 1. This includes the full end-to-end process, from determining what visits should take place, to post-visit administration. Activity leaders are to complete the checklist at Appendix 5.

Parental consent

Whilst parental consent is only statutorily required for nursery-aged children, the school seeks parental consent for all educational visits. This is obtained through use of School Cloud. The exception for this is a nursery educational visit, where consent is to be obtained in writing.

Frequent of educational visits

Educational visits should be spread throughout the year, with each year group ideally completion approximately 3 education visits per year (not including the Cumulus programme).

Residential activities

Responsibilities

External visits coordinator (EVC)

The EVC is again responsible for the overall coordination of all residential activities. His responsibilities for these are as follows:



- Working with external providers of adventure training activities to ensure an enjoyable, engaging and progressive programme that is value for money, from Prep 3 to Prep 8. This includes periodically reviewing the provider to ensure optimal quality and value for money.
- Capture lessons identified after activities to optimise the content and planning for future years.
- Whilst the content of the activities is often led by external providers, advise and support activity leaders in all other areas for which the school is responsible.
- Obtain copies of licences, insurance and risk assessments for activities managed by external providers.
- Ensure that activity leaders complete risk assessments to cover all areas not covered by those of the external providers. For example, risk areas unlikely to be covered by the external providers' risk assessments include safeguarding, travel to the venue and possibly allergens. Work with activity leaders where required to ensure that the risk assessment includes all appropriate risks.

For some specialist residential activities, such as an overseas French trip, the EVC may delegate some of his responsibilities (e.g. to the Head of MFL). However, he will remain accountable so will need to ensure all activities are completed.

School Business Manager

In consultation with the EVC, the School Business Manager will coordinate all transport requirements for residential activities, as well as completing trip costings.

Activity leader

Each activity will have a nominated activity leader. They are accountable to the Headmaster for running the activity.

Process

The process for the organisation of residential activities is at Appendix 2. This includes the full end-to-end process, from determining what visits should take place, to post-visit administration. Activity leaders are to complete the checklist at Appendix 5.

Parental consent

Whilst parental consent is only statutorily required for nursery-aged children, the school seeks parental consent for all residential activities. This is obtained through use of school cloud.

Weekend boarding activities

Responsibilities

Head of boarding

The Head of boarding is responsible for the coordination of all residential activities and educational visits. Their responsibilities are as follows:

- Accountable to the Head, ensure that there is a broad range of exciting and engaging activities for weekend boarders, in order to promote weekend boarding and maximise attendance.
- Provide a single point of contact to support and advise activity leaders on the planning and conduct of boarders' weekend activities.
- Plan the activities on behalf of the activity leaders, ensuring all compliance obligations are met. This includes:
 - Complete the risk assessment, checking to ensure that they are sufficiently rigorous, and filed appropriately. This includes confirming that staffing ratios are appropriate.



- If no staff member has been to the venue before, that a recce of the venue has been completed in advance of the visit.
- Ensure that a post-activity evaluation has been completed by the activity leader, which includes an assessment of the activity (to determine whether it should be repeated in future years, or recommend any changes) and a review of the risk assessment, to inform future risk assessments when this or similar activities are repeated.
- Book activities where appropriate.
- Organise the catering provision and liaise with the School Business Manager to arrange any additional transport or drivers needed (over and above the two 9-seater vehicles that are available).
- Complete retrospective trip costing forms and forward to the school's Finance Officer no later than the Wednesday after the activity.

Activity leader

Each activity will have a nominated activity leader. They are accountable to the Headmaster for running the activity. However, unlike educational visits, some of the planning responsibilities will be undertaken for them by the Head of Boarding.

Process

The process for the organisation of weekend boarding activities is at Appendix 3. This includes the full end-to-end process, from determining what visits should take place, to post-visit administration. Activity leaders are to complete the checklist at Appendix 5.

Parental consent

Parental consent is assumed, on the basis that full boarders are expected to attend all weekend boarding activities, or flexi-boarders have elected to board for the weekend and take part in the activities. A list of boarding activities will be published to all boarders' parents, giving them the opportunity to take the children out of school for the weekend should they not wish them to take part in an activity.

Risk assessment

General

The Health and Safety Executive (HSE) fully supports learning outside the classroom and states that *“well managed trips and outdoor activities are great for children. Children and young people will not learn about risk if they are wrapped in cotton wool”*.

A risk assessment is mandatory for each and every visit and activity, even if it occurs frequently (such as boarders going shopping at the weekend). It is acceptable to use a template for each activity, but the activity leadership should consider any variations to the specific trip. Minor differences could include a different venue, conflicting events that increase the size of the general public in those areas, or the weather.

Process

The process for completing a risk assessment is as simple as:

- systematically thinking about the trip from start to finish;
- identifying the hazards;
- developing suitable and appropriate control measures to manage the risk;
- sharing the information; and
- maintaining a clear audit trail.

To enable a thorough understanding of the risks, somebody involved in the risk assessment process must have either:



- previously attended a school visit at that venue; or
- conducted a recce of the venue for the purpose of evaluating and assessing the risk. Having been to the venue in a private capacity (e.g. family visit) is deemed to be inadequate, as it is unlikely that risks would have been actively considered and therefore may be missed.

If the latter, evidence of the recce must be filed with the risk assessment.

The staff member who had previously attended the school trip or completed the recce does not need to attend the external visit.

Details of how to complete the risk assessment are in D06 Risk Assessment Policy. A guide for useful factors to consider, which is specific to external visits, is included at Appendix 4.

External provider risk assessments

Where specific activities are run by an external provider and they complete the individual activity risk assessments (who are more experienced and better placed to do so), those risk assessments are acceptable as long as they have been reviewed within 12 months, and do not need to be copied into school risk assessments. In those circumstances, a recce can be conducted by the external provider; the activity leader is responsible for receiving assurance that this has taken place.

These risk assessments should be reviewed by the Activity Leader to ensure that they cover all activities, and identify any gaps. A risk assessment is therefore required to cover any missing risks, such as travelling to the venue and appropriate supervision measures. An assessment of the provider and their risk assessment should consider the factors in Appendix 4.

If the school has not used the host organisation previously, an exploratory visit will be conducted if possible, which may be achieved via video conferencing, in order to ensure that:

- the venue is considered suitable to meet the aims and objectives of the educational visit;
- the venue has carried out suitable and sufficient risk assessments;
- the venue can meet the needs of the school, in particular with reference to any pupils with medical or special educational needs;
- the venue carries the correct levels of insurance;
- the group leader can become familiar with the area before leading a trip.

When using a new partnership organisation, the activity leader must obtain references from at least two other schools who have used the venue or service previously.

Learning Outside the Classroom Quality Badge

When selecting activity providers, activity leaders should check whether they hold a LOtC award. Such an award is not a requirement for UK-based activity providers, but holding it provides an additional level of confidence that they meet nationally recognised standards. For overseas trips, an LOtC award must be held.

The presence of the award does not absolve the activity leader of doing their own due diligence as above. The list of all providers holding this award can be found at <https://lotcqualitybadge.org.uk/search>.

Licences

Certain activity providers are required to hold a licence under the Adventure Activities Licensing Regulations 2004. If the visit includes any of the following, the activity leader is responsible for checking that the organisation has an extant licence from the Adventure Activities Licensing Authority (AALA):

- **Caving.** Underground exploration in natural caves and mines including potholing, cave diving and mine exploration, but not in those principally used as show-places open to the public.



- **Climbing.** Climbing, traversing, abseiling and scrambling activities except on purpose-designed climbing walls or abseiling towers.
- **Trekking.** Walking, running, pony trekking, mountain biking, off-piste skiing and related activities when done in moor- or mountain-country above 600 metres and is remote (over 30 minutes travelling time from the nearest road or refuge).⁹
- **Water sports.** Canoeing, rafting, sailing and related activities when done on the sea, tidal waters or larger non-placid inland waters.

Providers' public liability insurance

Where an activity is being provided by an external organisation, the activity leader must check the provider's public liability is in date, and retain a copy of the relevant evidence. Dependent upon the nature of the trip, this may require a judgement to be made by the EVC or Head of Boarding to determine whether it is required. For example, for a boarders' visit to a swimming pool or cinema, the venue is providing access to their facilities but not running an activity. Also, it can be assumed that such a major venue holds current public liability insurance. In these circumstances, it is not essential to ask for proof of insurance. However, if their staff are leading an activity, evidence of insurance must be requested. Where insurance is not checked, the rationale for not checking it should be recorded on the risk assessment.

Self-run activities

Careful consideration must be given to any self-run activities and their inherent risks. For example, the risks inherent in a local walk may be considered acceptable, but open-water swimming in one of the Water Park lakes would be considered to risky; certainly any of the activities requiring an AALA licence would be forbidden, as the school does not hold such a licence and would not be insured.

Supervision and staff ratios

There are no statutory requirements or guidelines for staffing ratios. Rather, an assessment of the appropriate ratio is to be made during the risk assessment process. This is to consider the nature of the activity or activities being undertaken, type of travel, the venue, interaction with the general public, and the nature of individual pupils.

First aid

All visits must have at least one member of staff who is first aid trained. For EYFS trips, this must be a paediatric first aid qualification.

Water sports

Special consideration should be given to any activities based on water. Pools should only be used where trained lifeguards are in situ; this will be the case for most commercial UK pools, but may not be the case in hotel pools or pools outside the UK.

Reviewing the risk assessment during the activity

During a visit, risk should be continuously dynamically assessed, responding immediately to any new risks identified. This specifically refers to new risks being identified for the planned activities. Should a decision be made to change the planned activities, the risk assessment should be updated during the visit with the approval of the EVC or Head of Boarding, in order to manage any additional hazards and associated risk. If the risk assessments are updated during the visit they must be signed off by the EVC or Head of Boarding, and the updated information must be shared with all relevant members of staff and pupils.

Audit of risk assessments

In addition to the authorisation of risk assessments (as outlined in the various processes), a number of audits of risk assessments will take place, to ensure that they are of sufficient quality:



- The School Business Manager or Deputy Head Pastoral will carry out random and periodic audits of the risk assessments;
- Activity risk assessments are audited annually during their school advisory visits.

Communications

In addition to providing academic benefit to the pupils, such trips provide an excellent marketing opportunity for the school. Where possible, exciting and engaging photographs and videos should be taken. A plan should be agreed with the Marketing Manager to maximise this opportunity in a timely manner, which may include pictures being uploaded to social media whilst the visit is still ongoing, shortly after the visit, in the weekly Messenger, or for future marketing campaigns.

Where possible, the school's marketing phone is to be used (which can also be used by the school to contact staff on the trip). Staff are to ensure they confirm to A02 Mobile phone, smart watch and camera policy.

No pupils should take mobile phones with them on visits.

Training

All teaching staff are to be briefed annually on the planning and execution of external visits. This is to include:

- An outline of the procedures that they should follow to plan and run an external visit.
- The responsibilities and expectations of both activity leaders and other staff attending external visits.
- Referral to this policy, to be used as a guide and checklist for each activity.
- An overview of risk assessments.

Enhanced training is required for the EVO and Head of Boarding; they will complete the *Risk Assessments for School Trips* course on TES Develop annually, with evidence retained by the School Business Manager.

Volunteers

As a general rule, all trips will be staffed by school employees. This does not always just include teachers and teaching assistants; on occasion, drivers may be asked to provide support during the activity and supervise children. Whilst discouraged, the use of volunteers may be considered in extremis. Any such use of volunteers requires authorisation by the Headmaster, and must comply with A10 Visitor and volunteer policy. This includes full vetting checks for all volunteers. This will therefore require significant advanced planning to ensure references and DBS can be received prior to the activity.

Behaviour expectations of staff and pupils

The school's Behaviour Policy applies equally to children when they are being educated off-site. Indeed, being outside of the school, expectations are even higher as children are acting as ambassadors for our school. We expect our pupils to behave courteously to all members of the public that they meet. It is essential for their own safety that they listen carefully to their staff and act on any instructions given to them. It is also essential that all children actively participate in all aspects of the trip as trips are an integral part of the child's education. Children will always be reminded of the behaviour expectations before going off-site on their visit.

Inclusion

When formulating and planning trips, consideration must be given to the needs of all pupils within the relevant year groups. It is important that pupils are able to fully engage in all activities, and not feel isolated (physically or mentally) at any time.



Charging and insurance

The full cost of all educational visits, residential activities and weekend boarding activities is passed onto parents. This includes transport, driver and catering costs (except for weekend boarding activities, where catering is included in their boarding charge). This includes any associated costs, such as needing a hire vehicle for the school run, should vehicles be taken away to facilitate the activity.

To ensure that parents are happy with the activities offered by the school, it is therefore essential to ensure that trips are reasonably priced.

The school's insurance policy covers the school for all UK-based activities. Where travel insurance is required for residential trips, this will need to be included within the cost of the activity.

Evaluation

A post-visit evaluation is an essential part of any trip, as it informs repeats of the trip, or similar trips, in the future. It will inform the following questions:

- Was the visit of academic value to the pupils?
 - Should the trip be repeated?
 - If yes, should changes be made to improve it?
- Was the trip planning effective, or were lessons identified that will improve future visits?
- Did any accidents, incidents or near misses occur, and what lessons can be learned from them?
 - If yes, what changes or additions should be made to future risk assessments?

The evaluation form at Appendix 5 is to be completed following all activities. Upon completion, this is to be sent to the EVC.



Appendix 1 – Educational visits process and checklist

Stage	Activity	Timing	Lead
Scoping	The EVC will liaise with form and subject teachers to compile a list of proposed external visits, by term. This list will then be holistically reviewed they are appropriate, logistically achievable and financially viable, that they are relevant to the curriculum, educationally beneficial and is not a direct repeat of visits in previous years.	Trinity term of previous year	EVC
Approval	The refined proposed list (which may include options) goes through a 3-stage approval: <ul style="list-style-type: none"> Deputy Head Pastoral to approve content and decide options. This includes, on the advice of the EVC, the approval of activity leaders and external providers. (Where necessary, the EVC is to ensure due diligence into external providers has been completed). School Business Manager to confirm financial affordability and logistical achievability. This will require a provisional trip costing form to be completed by the Activity Leader. Headmaster for final approval. 	Trinity term of previous year	EVC
Diary planning	Activity leaders will determine availability from the relevant venues (where appropriate) and propose dates to the EVC. The EVC will populate the draft calendar, avoiding clashes. It is accepted that it may not be possible to confirm dates with the venue that are late in the year, but every effort should be made to confirm dates as soon as possible. Dates will be confirmed by the Deputy Head, who will move the events from the draft to the parents' calendar	Trinity term of previous year	EVC
Initial event planning	The following actions are required, where appropriate: <ul style="list-style-type: none"> Book activity with venue. Where possible, ask for the invoice to be sent to finance@hatheropcastle.co.uk. If they need card payment, please borrow a card from the Finance Officer. Review the trip costing form to confirm the amount to be charged to parents. Submit transport request to School Business Manager (link on SharePoint home page) Submit the catering request to the kitchen (link on SharePoint home page) Complete the risk assessment in conformance to D06 Risk Assessment Policy. If the activity has not been run at that venue previously, they must arrange for somebody to recce the venue, who will then assist in the creation of the risk assessment. 	Before the end of the preceding term, with the exception of booking, which should be ASAP	Activity leader



	<ul style="list-style-type: none"> • Having assessed staffing numbers in the risk assessment, identify which staff members will take part. This must include at least one first-aid trained staff member. • Where appropriate (see section in main policy), obtain and review the following from the external providers/venue: <ul style="list-style-type: none"> ○ Evidence of public liability insurance. ○ Operator’s licence. ○ Activity risk assessment(s). 		
Notification to parents	<ul style="list-style-type: none"> • The school administrator will send a letter to parents outlining all the trips for each year group in the coming term. This will include the costs for each activity, and a link to a Microsoft Form for parents to give permission for their child to attend. • The school administrator will review the list and chase parents that have not yet completed the permission form. 	Holiday club week of the preceding term INSET at the start of term, until all completed	School administrator
Confirmatory planning	<ul style="list-style-type: none"> • Confirm transport plan with School Business Manager, and that it still meets the needs of the trip. • Confirm the catering requirements with the Chef Manager, so that the kitchen is aware of any changes. • Confirm with the Medical Lead so that they can prepare medical/contact notes, medical pack(s) and any medication. This must include confirming whether any pupils suffer from travel sickness. • Confirm availability of marketing phone and social media exceptions (pupils who cannot be in photographs) with the Marketing Manager. • Confirm staff attendance, pupil numbers and staffing ratios with EVC. Confirm any cover requirement with the Deputy Head Pastoral. 	2 weeks before activity	Activity leader
Final preparation	<ul style="list-style-type: none"> • Confirm packed lunch collection time with the Chef Manager. • Confirm vehicle allocation, drivers and departure time with the School Business Manager • Collect medical pack from the Medical Lead • Take a copy of the Risk Assessment and Critical Incident Plan. (Electronic copy is acceptable, as long as devices are suitably charged). 	Day before activity	Activity leader
Execution of visit	<ul style="list-style-type: none"> • Collect packed lunches, transport and marketing phone (as required). • Provide school office with a list of all staff and pupils on the trip. This is to include a vehicle 	Day of activity	Activity leader



	<p>loading list, so they know who is in which vehicle.</p> <ul style="list-style-type: none"> • Lead and run the visit in line with the risk assessment, dynamically risk assessing any changes as required. • Inform the school office by telephone when you arrive at the venue. • If agreed with the Marketing Manager, send photos of activities that can be uploaded to social media during the day. • Inform the school office when you depart, with an estimated arrival time, changes to who is in which vehicle, and any children who have been collected by parents. • Should the estimated return time increase by more than 10 minutes (such as in the event of traffic), the school office is to be informed. • In the event of an emergency, or any incidents of concern, refer to D02 Critical Incident Plan and act accordingly. 		
Post visit admin	<ul style="list-style-type: none"> • On return to school, it is essential that all vehicles are checked for fuel levels, to ensure there is sufficient fuel the next time the vehicle is needed. If there is less than ¼ of a tank, the School Business Manager is to be informed ASAP. • Complete a post-visit review and send it to the EVC. • Make any retrospective changes to the risk assessment (annotating changes in red), to inform future risk assessments. • Where applicable, submit an expenses claim form to the Finance Officer. 	Day of/after the visit	Activity leader
Visits review	Hold a meeting with between the EVC and Deputy Head Pastoral to review the visits that have taken place, in order to assess whether they should be repeated in future years, or whether changes should be made.	After the last visit of each term	EVC



Appendix 2 – Residential activities process and checklist

Stage	Activity	Timing	Lead
Review	The planning for residential activities essentially starts, where applicable, with a review of the previous year's activities. From this 'lessons identified' process, feedback can be given to external providers to refine future programmes. This is best done as soon as possible after the events, to ensure maximum capture of information.	Following previous year's activities	EVC
Provisional booking	Following any review by the EVC, dates should be booked with the external provider shortly after completion of the previous year's activity. This should include any recommendations for changes to the programme.	11 months before the activity	EVC
Initial programme planning	Programmes will be constructed by external providers and reviewed by the EVC, who will propose changes as required. Full costed programmes are required 9 months in advance of the event, as the cost is charged over multiple terms. (This lead time can be shortened to 4 months if necessary for cheaper events, such as Prep 3 and 4 Cumulus).	9 months before activity	EVC
Finance and logistics planning	The School Business Manager will prepare the logistics plan, book transport and cost the activities (where appropriate).	8 months before activity	SBM
Notification to parents	A letter will be sent to parents describing the residential activity, providing them with the cost (and payment profile) and asking them to sign up for the activity. The letter will ostensibly come from the activity leaders of form teachers; however, the EVC may wish to send them out on their behalf, using previous templates.	TBC by SBM; subject to billing timeframe	EVC
Confirmatory planning	<ul style="list-style-type: none"> Confirm transport plan with School Business Manager, and that it still meets the needs of the trip. Confirm the catering requirements with the Chef Manager, so that the kitchen is aware of any changes. Confirm with the Medical Lead so that they can prepare medical/contact notes, medical pack(s) and any medication. Confirm availability of marketing phone and social media exceptions (pupils who cannot be in photographs) with the Marketing Manager. Confirm staff attendance, pupil numbers and staffing ratios with EVC. Confirm any cover requirement with the Deputy Head. 	2 weeks before activity	Activity leader



Final preparation	<ul style="list-style-type: none"> • Confirm packed lunch collection time with the Chef Manager. • Confirm vehicle allocation, drivers and departure time with the School Business Manager • Collect medical pack from the Medical Lead • Take a copy of the Risk Assessment and Critical Incident Plan. (Electronic copy is acceptable, as long as devices are suitably charged). 	Day before activity	Activity leader
Execution of visit	<ul style="list-style-type: none"> • Collect packed lunches, transport and marketing phone (as required). • Provide school office with a list of all staff and pupils on the trip. This is to include a vehicle loading list, so they know who is in which vehicle. • Lead and run the visit in line with the risk assessment, dynamically risk assessing any changes as required. • Inform the school office by telephone when you arrive at the venue. • If agreed with the Marketing Manager, send photos of activities that can be uploaded to social media during the day. • Inform the school office when you depart, with an estimated arrival time, changes to who is in which vehicle, and any children who have been collected by parents. • Should the estimated return time increase by more than 10 minutes (such as in the event of traffic), the school office is to be informed. • In the event of an emergency, or any incidents of concern, refer to D02 Critical Incident Plan and act accordingly. 	Day of activity	Activity leader
Post visit admin	<ul style="list-style-type: none"> • Complete a post-visit review and send it to the EVC. • Make any retrospective changes to the risk assessment (annotating changes in red), to inform future risk assessments. • Where applicable, submit an expenses claim form to the Finance Officer. 	Day after the visit	Activity leader



Appendix 3 – Weekend boarding activities process and checklist

Stage	Activity	Timing	Lead
Scoping	The Head of Boarding will create a balanced and varied programme of activities throughout the year, which are appropriate for the boarders' ages, logistically achievable, financially viable and value for money. Estimated costs should be calculated at this stage.	Trinity term of previous year	Head of Boarding
Approval	Once the proposed list is completed, this will be discussed with the Headmaster for approval.	Trinity term of previous year	Head of Boarding
Staff allocation and diary planning	Activities are planned prior to the term and an MS form is sent out to all staff so that we ensure that staff pairings, staff interests, a female member of staff on each trip are all organised	Finalised the week before each term starts	Head of Boarding
Initial event planning	The following actions are required, where appropriate: <ul style="list-style-type: none"> Review the trip costing form to confirm the amount to be charged to parents will remain reasonable. Complete the risk assessment in conformance to D06 Risk Assessment Policy. If the activity has not been run at that venue previously, they must arrange for somebody to recce the venue, who will then assist in the creation of the risk assessment. Where appropriate (see section in main policy), obtain and review the following from the external providers/venue: <ul style="list-style-type: none"> Evidence of public liability insurance. Operator's licence. Activity risk assessment(s). 		Head of Boarding
Confirmatory planning	<ul style="list-style-type: none"> Confirm transport plan with School Business Manager, and that it still meets the needs of the trip. Confirm the catering requirements with the Chef Manager, so that the kitchen is aware of any changes. Confirm with the Medical Lead so that they can prepare medical/contact notes, medical pack(s) and any medication. Confirm availability of marketing phone and social media exceptions (pupils who cannot be in photographs) with the Marketing Manager. Confirm staff attendance, pupil numbers and staffing ratios with EVC. Confirm any cover requirement with the Deputy Head. 	1 weeks before activity	Activity leader
Execution of visit	<ul style="list-style-type: none"> Collect packed lunches, transport and marketing phone (as required). Provide school office with a list of all staff and pupils on the trip. This is to include a vehicle loading list, so they know who is in which vehicle. 	Day of activity	Activity leader



	<ul style="list-style-type: none"> • Lead and run the visit in line with the risk assessment, dynamically risk assessing any changes as required. • Inform the school office by telephone when you arrive at the venue. • If agreed with the Marketing Manager, send photos of activities that can be uploaded to social media during the day. • Inform the school office when you depart, with an estimated arrival time, changes to who is in which vehicle, and any children who have been collected by parents. • Should the estimated return time increase by more than 10 minutes (such as in the event of traffic), the school office is to be informed. • In the event of an emergency, or any incidents of concern, refer to D02 Critical Incident Plan and act accordingly. 		
Post visit admin	<ul style="list-style-type: none"> • Complete a post-visit review and send it to the EVC. • Make any retrospective changes to the risk assessment (annotating changes in red), to inform future risk assessments. • Where applicable, submit an expenses claim form to the Finance Officer. 	Day after the visit	Activity leader
Visits review	Hold a meeting with between the EVC and Deputy Head Pastoral to review the visits that have taken place, in order to assess whether they should be repeated in future years, or whether changes should be made.	After the last visit of each term	EVC



Appendix 4 – Considerations for risk assessments

Areas of risk to be considered

The following areas need to be systematically considered within the risk assessment:

- Trip
- Venue
- Transport
- Group
- Activities
- Dynamics of the group
- Pupil who has different or complex needs
- Competency and experience of staff who will be supporting the visit
- Communication, co-operation and coordination
- Contingency and emergency plans

Confirm systems and controls in place

The following systems and controls need to be considered in any risk assessment produced by school staff, and it should be evidenced that the systems and controls have been considered. Where external providers have completed activity risk assessments, they should be reviewed to ensure all of these systems and controls are in place, and if not evident, assurances should be sought and documented.

- Are the instructors competent to lead the activity?
- Is all the equipment safe and maintained?
- Are the correct levels of supervision in place to prevent incorrect use of the equipment?
- Are the pupils capable?
- Will they receive the necessary information and instruction?
- Do the pupils recognise the potential effects that their behaviour may have on themselves and other users of the equipment?
- Are there any vulnerable people?
- The host organisation's cleaning schedules.
- The host organisation's infection control procedures.
- Track and trace systems are in place.

It is important to remember when undertaking risk assessments for educational visits that the required control measures are usually dependent upon the group or person, not just the hazard.

Additional factors to consider

- Vulnerable people
- Cleaning procedures
- Infection control systems
- Reporting systems
- Test and trace procedures
- Financial arrangements
- The facilities/equipment that will be required during the educational visit or trip
- The facilities/equipment which will be provided at the venue
- Staff training needs
- The vetting suitability of partnership organisations; for example, accommodation
- First-aid and accident, incident and near miss procedures
- Accident, incident and near miss investigation processes
- Reporting of any accidents, incidents and near misses



- Transport arrangements
- Insurance arrangements
- Communication, cooperation and coordination arrangements between the host provider and the school
- Communication arrangements, including communication with parents during the visit
- Pupils' ability to contact their parents/carers
- Parent/carer consent
- Supervision ratios
- Lost child procedures
- Sickness arrangements, including group leaders, supervisors and pupils
- Medical consent
- Arrangements for those with disabilities, medication or special educational needs
- Contingency arrangements which include, for example:
 - accidents incidents and near misses
 - transport issues to accommodation issues
 - supervision issues of pupil problems
 - change of plan or late return
- Information to parents/carers
- Information for pupils
- Emergency arrangements



Appendix 5 – Visit checklist

Visit details

Activity leader	
Member of staff completing the risk assessment (if different)	
Visit date	
Time of departure from school	
Estimated time of return to school	
Purpose of visit/Nature of activity	
Venue(s) to be visited	

Planning

Activity	Timing/ response to question	Date completed
Booking confirmation	Previous term	
Activity paid for/instructed to invoice to finance	Previous term	
Transport request completed	Previous term	
Catering request submitted	Previous term	
Has somebody completed activity at venue before?	Yes/No	
If no, who completed the recce and when?		
Risk assessment completed	Previous term	
Confirmation that at least one staff member is first-aid trained (include name of staff member)		
Information to School Administrator about trip to go to parents	Previous term	
Confirm transport with School Business Manager	2 weeks before trip	
Confirm catering requirements with kitchen	2 weeks before trip	
Confirm medical provision/notes with medical lead	2 weeks before trip	
Confirm whether any pupils suffer from travel sickness and make appropriate arrangements	2 weeks before trip	
Confirm availability to marketing phone and pupil social media restrictions with marketing manager	2 weeks before trip	
Confirm staff and pupil attendance with relevant staff and School Administrator, including confirming that all parents have given permission.	2 weeks before trip	
Confirm with Deputy Head that cover is in place for all staff where applicable	2 weeks before trip	
Confirm packed lunch collection time with kitchen and any changes to numbers/dietary requirements	Day before trip	
Confirm vehicle allocation, drivers and departure time with School Business Manager	Day before trip	
Collect medical pack and medication from medical lead, or arrange collection for the following morning	Day before trip	
Check copy of risk assessment and critical incident plan	Day before trip	
Obtain list of all parents' contact details for use in an emergency (residential and weekend boarding activities only)	Day before trip	
Collect packed lunches	Day of trip	



Attendance and vehicle loading list to School Administrator	Day of trip	
Collect marketing phone from Marketing Manager	Day of trip	
All staff and pupils briefed on risk mitigation measures in the risk assessment, and confirm that relevant emergency and reporting procedures are known to all staff on the trip	Day of trip	
If self-driven, check all vehicles have at least ¼ tank of fuel, and report to School Business Manager is lower	Immediately on return	
Complete post-trip evaluation	Day of/after trip	

Activity leader _____

Date _____



Appendix 6 – Visit evaluation

Purpose of visit					
Venue					
Activity leader					
Visit date					
Number of participants	Boys		Girls		Staff

Please rate each factor from 1 (unsatisfactory) to 10 (excellent)

Factors to consider	Rating	Comments/lessons identified	Recommendations for future trips
Pre-visit recce (where applicable)			
Provider's pre-visit organisation (where applicable)			
Travel arrangements			
Educational value <i>a) Where the educational content was below (10) what was done to reinforce/extend what the children had learnt</i> <i>b) What changes would you make to the trip in order to achieve a rating of '10'?</i>			
Timing and duration of visit			
Quality of instruction			
Equipment			
Suitability of environment			
Retrospective view of the planning process			
Incidents and near misses (all should be recorded; append separate document if necessary)			
Evaluation of risk assessment (include any recommended changes should the event be repeated)	Changes required? Yes No		
For residential activities			
Accommodation			
Evening activities			

Activity leader _____

Date _____

