

INVICTUS

Education Trust

**EDUCATION VISITS POLICY
AND PROCEDURES**

Approved by Board of Trustees
30th September 2019

To be reviewed by Board of Trustees
September 2021

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1. POLICY AIMS

We believe that Educational Visits (also known as “Learning Outside of the Classroom” – LOtC – activities) of all kind can have a positive impact on young people’s learning and development, including improvements to academic achievement, personal development and behaviour. However, the health and safety of all participants in visits, students and staff, is paramount and this policy outlines how party leaders should operate to ensure this.

In this document, the following abbreviations will be used:

- EVC the School Educational Visits Coordinator
- EVA the Invictus Education Visits Advisor. This currently the EVA for Local Authority
- PL Party Leader
- *** Shows where supporting documents are available in “Organising Educational Visits” which is available on the T drive

2. DEFINITIONS

If you wish to take students off site, no matter how short the event, please speak with the EVC as soon as you can so that we can decide which type of activity it is and which procedures apply

Visit Definitions

Routine Curriculum Opportunities

- take place within lesson time and do not disrupt any other lessons
- may involve the whole school (e.g. Carol Services)
- do not usually involve transport
- Visits procedures do not usually apply

PE Fixtures

- After school sporting activities or those departing not earlier than lunchtime
- PE fixture procedures apply

WEX

- Arranged in accordance with WEX guidelines for Y10 and Y12
- Includes pre-WEX placement visits
- No visits procedures required

KS4 College Courses & Sixth Form courses taught in other schools

- Part of the curriculum for these students
- Parents are informed as part of options process
- No visits procedures required

Full Visit

- All other occasions when students are taken out of school will be defined as a full visit. All procedures below will apply.

3. ENDURING CONSENT and MEDICAL CONSENT FORMS***

In line with DfE policy, from September 2012 onwards parents can be asked to sign an enduring consent form for all off-site activities where we do not ask for a parental financial contribution. **This consent form would NOT include any visits where a charge or parental contribution is needed** such as residential or foreign visits. A separate medical form is also required before students can take part in any activity. However, in order to reduce paperwork both the consent form and the medical form will be valid for a whole key stage:

- Forms signed in Years 7/8/9 will remain valid until the end of Year 9
- Forms signed in Years 10/11 will remain valid until the end of Year 11
- Forms signed in Years 12/13 will remain valid until the end of Year 13

Parents must still be informed of any off-site activity in advance and they must be given the opportunity to tell us if they do not wish their child to take part in any particular activity.

4. APPROVAL STAGE

Provisional Approval

Any colleague who wishes to organise a visit must complete a Proposed School Visit form. This allows the EVC to approve a visit in principle before other parts of the policy are implemented. Foreign and residential visits must also be approved by the Governors. Each year there will be a deadline in the summer term for visits to be included on the following year's calendar. Staff will be notified of the deadline in advance. Other visits will only be considered in relation to the effect on the curriculum. If the activity is being organised for the first time, or by a new PL, advice should be sought from the EVC before this form is completed. Issues for discussion will include whether a reconnaissance visit or additional training may be required.

Compulsory curriculum visits are often approved subject to the following restrictions:

- Such visits are compulsory for all students and all must attend unless the parent can give a good reason why not
- Steps must be taken to offer financial support for those unable to pay e.g. for PP students
- Letters to parents must make both of these points clear
- If the department is considering not offering a place on the visit to a particular student due to his/her behaviour, this must be discussed with the EVC before letters are sent out.
- Any students who do not participate must be set work by the subject concerned which will provide as near as possible a curriculum experience as that which would have been obtained on the visit
- Where the visit involves a whole year group/half year group, if the number of non-participants is too great to allow them to be dispersed among other groups (e.g. more than about 10), the department concerned may be asked to supervise the students for all or part of the day, providing an appropriate curriculum opportunity as outlined in point 5.
- If fewer than 90% of the students decide to participate the viability of the visit may be called into question; you should see the EVC before paying any money to providers if this seems likely

Final Approval

Once provisional approval has been granted, the PL must draft a letter to parents and complete a risk assessment. These documents should all be submitted to the EVC according to the set timescale.

The LA regulations for approval for visits vary according to the level of risk. Visits in Category A – Normal Risk are approved by the school and no external notification is necessary. However, for visits in Category B - Additional Risk or Category C – High Risk, external approval must be sought after school approval has been obtained. See section C below for categories of risk.

Approval for Provider-led Activities

If the visit takes place to an establishment or is organised by a provider during which certain activities, often those that have either additional or high risks associated with them, are to be staffed by the provider organisation, the school must assess the quality of provision before approval is given. Form **EVC1** is a questionnaire for this purpose. The preferred use of this form is for it to be completed by the provider and returned to the leader. The provider's representative, giving details during the pre-visit, should be someone of appropriate standing and their name should be recorded. **However, please note that many providers now have LoTC status, which makes the EVC1 obsolete**

Approval for Residential Visits

When undertaking a visit that involves a residential stay the suitability of the accommodation must be risk assessed. Form **EVC2** is provided for this purpose. The preferred use of this form is for it to be completed by the provider. The PL must ensure the name and position of the person supplying the information is recorded. If the answer to any question is no, this does not necessarily mean that the accommodation cannot be used, although a greater level of risk assessment will be required. **However, please note that many providers now have LoTC status, which makes the EVC2 obsolete**

NB Unless the provider has LoTC status, PLs should not accept bookings where the exact accommodation is not determined until the last moment or where a tour operator may attempt to change the booking after the organisation and payment has been made. Last minute alterations to accommodation will only be possible if the alternative arrangements can be satisfactorily assessed. If this is not possible, the visit may have to be cancelled.

Summary of timescale for approval

Type of visit	Deadline for submission of forms
Normal risk	Draft letter and risk assessment to EVC at least 3 working weeks in advance, then onto EVOLVE
Additional or High Risk activities	Draft letter, EVC1 and risk assessment to EVC <u>at least</u> 8 working weeks in advance, then onto EVOLVE
Residential activities	Draft letter, EVC2 and risk assessment to EVC <u>at least</u> 8 working weeks in advance, then onto EVOLVE

5. CATEGORIES OF RISK

Category A - Normal Risk

These are activities that present no significant risk beyond those of everyday life. Some of these activities still expose participants to appreciable risk and, for example, crossing a road or any activity near water will present risks to an inexperienced and unsupervised person.

These activities are:

- Visits to local places of religious worship, museums, open farms, zoos, sports centres, towns or villages.
- Attractions that are specifically designed for use by groups and where the owners are responsible for the procedures and safety of those attending and accountable to the Health and Safety Executive. Examples include: theme parks and adventure playgrounds
- Swimming pool visits under the auspices of the County Swimming Services or other qualified instructor, supervisor or lifeguard.
- Taking groups as passengers on any public transport including licensed passenger craft, ferries, aircraft, railways, buses or coaches.

- Inter-school sports matches and events
- Field studies in environments presenting no technical hazards including pond studies where the supervisor could effect a rescue from the bank or by wading and small streams where the depth is nowhere deeper than 15cm.
- Activities such as walking in a parkland or non-remote country area with no technical hazards.

Category B - Additional Risk

These are activities or visits to locations with a higher risk. Safe supervision will require the leader to have some specific knowledge and abilities that need to be assessed. This will be by having additional qualifications and/or verifiable experience.

The current **Approved Activities List** is:

- Walking or field studies in non-remote country where technical hazards exist. In particular, where there are cliffs or quarries of any height, areas of steeply sloping ground, or natural water features (rivers, ponds or lakes) that would present a significant hazard if a participant fell in. In Staffordshire, this would include walking on the Roaches Hill and areas of the White Peak with cliffs, such as Chrome Hill, and activities beside rivers such as the Trent or the Dove.
- Camping.
- Cycling on either road or off-road areas in Staffordshire such as Cannock Chase.
- Orienteering in areas that are open to the general public or have technical hazards such as steep banks, water features (ponds or rivers), dense woodland or are open to roads and vehicles.
- Canal studies and activities along canal banks and boating in a powered canal boat.

Category C - High Risk

These are the highest risk activities. They include all those included within the *Adventure Activities Licensing Regulations 1996* (AALR) plus some other activities included in the current **Approved Activities List** shown below: -

- Walking and trekking activities on any open moor (at any altitude) or land above 600 metres where it is possible to become more than 30 minutes walking time from the nearest transport or refuge.
- Any activity on or in open water. This includes canoeing and kayaking, sailing, windsurfing, rafting, rowing, powerboating and water skiing, sub-aqua, gorge walking and swimming in any open water including the sea, rivers, lakes or canals. This also includes river study fieldwork where flowing rivers deeper than 15cm are practically investigated.
- Caving (except guided visits to public areas of show caves).
- Climbing including gorge walking with technical descents or ascents.
- High ropes courses.
- Skiing including supervising skiing sessions at ski resorts or at artificial ski slopes.
- Horse riding.
- Off road cycling outside Staffordshire (all terrain or mountain biking).

Other Activities

Activities that are not on the current authority approved activities list are either not considered appropriate for school students or not activities for which the authority has a technical expert. Schools wishing staff to lead, instruct, or supervise any other activity should check with the EVA. It may be necessary to engage an appropriate technical expert to assess the proposal.

6. ORGANISATION STAGE

Once provisional approval has been given staff will receive the document Educational Visits - Provisional Approval from the EVC along with Organising Educational Visits. The checklists in this document outline the timescale for each part of the procedure, which is described below.

Information Letter / Parental Consent ***

A letter outlining full details of the visit must be sent to parents. The letter should include a consent form as consent must be obtained in writing before any student can participate in a visit

Risk Assessment***

The PL must complete a risk assessment. Ideally, this would be done in consultation with all other accompanying staff. Where this is not possible, the contents must be shared with all other relevant colleagues.

The purpose of a risk assessment is to identify hazards and then decide if these pose a risk. If so, measures to reduce or eliminate the risk must be identified. The assessment should take into account the venue, seasonal conditions, the age/maturity/behaviour/special needs of the students and the competence, experience and qualification of accompanying staff. It should also outline the fact that sanctions will be imposed where rules are broken. Further advice on completing the risk assessment is available from the EVC.

A risk assessment for use in case of a major incident is available. This has been devised with help from the EVA. It should form part of all relevant risk assessments.

Evolve System ***

Once all documentation is available and **before anyone is financially committed to the visit** details of the visit must be entered into the EVOLVE system for approval by the EVC, Principal and EVA if required.

Charging for visits

By law, we are not allowed to charge for visits wholly or mainly in school hours nor for visits at any time which are compulsory curriculum visits or essential given the syllabuses of prescribed examinations, except for board and lodgings on a residential visit. However, we are able to ask for voluntary contributions for all types of visit. The letter sent to parents must be carefully worded – PLs should follow the samples and ask for guidance if necessary. All letters must clearly inform parents of how they can seek financial support in cases of financial hardship.

To work out if a visit is wholly or mainly in school time, the day is divided into 2 equal halves from 12.00am – 12.00pm / 12.00pm – 12.00am. The whole half day is counted no matter how many hours in that 12-hour period are “used” e.g.:

- If a visit departs at 6.00am on a Friday and returns at 6.00pm on a Saturday there are 2 sessions of school time and 2 sessions of non-school time – therefore it counts as mainly in school hours and a charge cannot be made
- If a visit departs at 1.00pm on a Friday and returns at 6.00am on a Saturday there is 1 session of school time and 2 sessions of non-school time – therefore, it counts as mainly outside of school hours and a charge can be made.

Personal Accident/Travel Insurance

An annual insurance policy has been organised through the Trust, which gives benefits that exceed those of most tour operators and provides a telephone number giving rapid access to support and assistance in the event of a claim. Visit leaders must carry this telephone number with them throughout the visit.

PLs should not use a tour operator's insurance scheme unless this offers at least the same level of benefit as the MAT scheme.

Public Liability Insurance

PLs are responsible for checking that any provider has public liability insurance of at least £5 million. Within the EU, this equates to approximately 6 million Euros although it should be noted that public liability insurance might not be the norm in all countries. This should be investigated and guidance sought from the EVA if needed. Parents will need to be informed if this cover is not available but the trip is otherwise given approval.

Staffing ratio

This should be at least 1:20 and should include both male and female adults if the party is mixed. School employees who are not teachers can be included in the staffing ratio. However, unless the group is very small, a qualified teacher should be in charge of the party and in the case of bigger groups, at least half the supervisors should be teachers.

Volunteer adults who are not school employees may accompany groups. Such adults, should not have unsupervised, sole charge of a group of students, unless they have undergone a DBS check. The DBS is essential for foreign or residential visits. Teachers remain responsible in law for the students even if other adults accompany the visit. Staff, should not be accompanied by their own children, except in special cases with prior approval of the EVC.

Note; on route to destinations, where staff are only supervising travel, ratios may be lower. Apart from short distance journeys (predicted travel time of less than one hour) there should be a minimum of one staff member to 30 students. In addition, some overseas Governments impose different ratios – for example, it is understood that in France the minimum ration is 1:9. PLs should seek further advice on such matters.

Inclusion

All students have the right to participate in Educational Visits and where necessary the Visit Leaders must ensure that arrangements are made to ensure access for all through direct or realistic adaptation or modification

It is unlawful to:

- Treat a disabled young person less favourably
- Fail to take reasonable steps, to ensure that disabled persons are not placed at a substantial disadvantage **without justification.**

The inclusion of all students may have implications for transport arrangements and supervision arrangements, guidance should be sought at an early stage from the EVC or SENCO, so that an appropriate risk assessment can be made. If the risk assessment suggests that the presence of a Teaching Assistant or other additional adults may be required, you should speak to the EVC and SENCO as early as possible.

Volunteer Drivers ***

Where participants are to be transported in the cars of parent volunteers (or other students over the age of 17 years), parents must be informed and consent to this travel. A parent volunteer driver must never travel alone with any participant who is not his or her own child.

Cars of volunteer drivers must be taxed, insured and maintained to the current legally required standard. Most insurance companies include this cover within the clause covering social, pleasure and domestic use. However, drivers must check with their insurers that their policy is valid in these circumstances.

In some cases business use insurance may be needed, especially for students, (e.g. in the same way it is if teachers use their cars to travel to courses) and this must be checked in advance.

The PL should check that volunteer drivers are suitable and can be relied on to operate their vehicle legally and safely and volunteer drivers must be given instruction regarding what is expected of them. This is achieved by asking them to sign a declaration of which they retain a copy. However where a volunteer will be regularly driving participants and especially if they undertake single vehicle journeys, where no-one else could verify where the vehicle went or how long it took, they must be subject to a DBS declaration.

Financial procedures

The PL must make sure that the trip is self-financing. Any short fall will be taken from the relevant faculty budget.

School Financial Support for Visits

Financial support is available from this budget in certain cases:

- Travel and other costs incurred by students may be subsidised if the visit is part of a compulsory element of an examination course. If this applies to your visit, please speak to the EVC.
- In cases of financial hardship, e.g. if the student is on the PP list, a subsidy will be available to ensure a student is not prevented from participating in an activity.

Medical Information

PLs will be provided with medical information for students participating in the visit. However, they no longer need to carry Medical Consent Forms unless the visit is residential in the UK or abroad. For these trips the original medical forms should be taken and up-to-date medical information should be sought 7 – 10 days before departure***. For residential visits, approval to administer an extended list of medication can be sought from parents. If you wish to do this please speak first to the EVC. A sample form is available.

Briefing meetings/Behaviour

Before any visit, the PL must hold a briefing meeting for students and staff, to fully explain, the itinerary and expectations. For foreign or residential visits, parents should be invited to the briefing meeting. It is recommended that the PL put the relevant information in writing so that they can be certain all parents and students have access to it.

One of the factors, which can negatively impact on Health and Safety, is the behaviour of the students concerned. All visit letters /consent forms will therefore include a statement about the importance of good behaviour and will include details outlining parental responsibility to remove students from the trip if their behaviour becomes a Health and Safety issue. The need to impose sanctions early in the case of behaviour issues is also a key part of the risk assessment and training. A sample behaviour contract for residential visits is available. ***

Please note:

- Normal school rules in relation to Tobacco and Alcohol etc. apply on any visit.
- PLs may decide if it is appropriate for students to wear uniform.
- Where the students have free time they should be told to stay in groups of at least 3-4
- See note on mobile phone use in section 16

Emergency procedures ***

It is a legal requirement to have these in place. PLs must be familiar with the Emergency Procedures document and a copy should be available to other accompanying staff. A copy of the Emergency Contact Information must be given to the EVC before each visit. For every visit extending beyond the normal school day, a nominated person (usually the Principal) will provide 24/7 cover as an Emergency Contact. This person will have 24/7 access to all details of the visit which should include medical and next-of-kin information regarding staff, as well as young people.

First aid

A first aid kit must be available on all visits. For day trips in the UK, one of the accompanying adults should hold a first aid qualification if possible. If students with significant medical issues are participating, this may become essential – please discuss with the EVC in advance. For foreign or residential visits, such a qualification is always essential.

School Mobile Phone for emergencies

The PL should ensure that there is a school mobile phone available for emergency use and that the number is left with the office and emergency contact person. In line with the child protection and safer working policies, staff must use a school mobile for all contact with students – e.g. if you wish to give students a number in case of emergency.

Student use of Mobile Phones

Careful thought should be given to the use by students of mobile phones. In many cases, they can be useful, for example during remote supervision. However, in the unlikely event of an accident to one student it is important that the parents get information from the PL not from other students. This should be part of the student briefing.

Swimming ***

If swimming is likely to be part of the visit a separate swimming consent, form must be completed. Before allowing students to enter the water, the PL should:

- ensure there is appropriate supervision by staff even if lifeguards are present
- be aware of the local conditions and designate a safe area of water for use by the group
- brief the group about the limits of the swimming area
- ensure that students have not eaten (at least half an hour) before swimming
- ensure the activity is suitable for the students, especially any with disabilities
- ensure that non-swimmers are adequately supervised
- adopt and explain the signals of distress and recall
- ensure that buoyancy aids are used where appropriate
- carry out regular head counts - plus be aware that it is not always possible to tell when someone is in difficulties

Please note: swimming or paddling in open water (the sea, lakes, rivers etc.) is NOT permitted, unless at least one of the accompanying adults holds an Open Water Lifesaving qualification. See the EVC for more information

Unaccompanied visits

For some visits involving small groups of sixth formers, permission may be given for the students to participate in a visit without an accompanying teacher. Further guidance should be sought from the EVC.

Duke of Edinburgh's Award

The normal EVOLVE procedures apply for DfE expeditions.

E-Safety

On visits where students may take photographs, the PL should remind students about E-Safety guidelines e.g.:

7. DISTRIBUTION OF MEDIA BY STUDENTS – e.g. photos, videos, voice recordings etc.

We want the students to have lots of happy memories of the trip and the photos they take will be part of this. However, unless they have specific permission of all involved persons, students must understand that:

- *They must not send these to anyone else*
- *They must not post these on any form of social media*

Evaluation / Reporting of Accidents or Incidents ***

After the visit the PL should evaluate the activity on EVOLVE within 28 days. Any incident that could have had severe consequences to the welfare of any participant or staff member, and any failure of the services offered by a provider should be reported on the “Report of an Incident” form. This may also be used for the leader or school to retain a record of any other incident. If any member of the party had an accident, this must be reported using a standard Accident Investigation form (EDAF 2)

Up-to-date advice

The EVA publishes new guidance on EVOLVE when situations arise. New guidance for theme park visits was published after the incident at Drayton Manor. EVCs should be alert to these and inform PLs about them if relevant.

8. ADDITIONAL INFORMATION FOR FOREIGN AND RESIDENTIAL VISITS

Accommodation issues

The PL must ensure that:

- Where possible the group’s immediate accommodation is exclusively for the group’s use where the reception is not staffed 24 hours a day, security arrangements are in force to stop unauthorised visits, for example, external doors must be made secure against intrusion and windows closed as necessary to prevent intrusion.
- Bedroom doors should be locked from the inside (unless the group have sole use of the accommodation) but staff must have reasonable access to the pupil accommodation at all times, e.g. they should arrange to have access to a master key.
- Students are given instructions about the best place to leave their key, once the door is locked from the inside, to ensure they can find the key in an emergency and that staff can unlock the door from the outside if required.
- Students are given instructions about fire safety and the evacuation procedure. This should also form part of the risk assessment.

Contacting emergency services / consulates ***

All adults accompanying the visit must be provided with information about how to contact the emergency services in the countries to be visited. The PL should also know how to contact the nearest consulate.

School mobile phone for emergencies***

Students should carry a card (possibly on a lanyard for younger students) in a relevant foreign language for use if they get lost, asking the reader for help. This should include a contact phone number for the PL. The card should be explained in advance e.g. at the parents' meeting and parents should also be given details of the emergency number. This number should also be given to the accommodation reception desk, coach drivers, tour company reps etc.

Additional information needed from parents***

An "Information form for Visits Abroad" is available and should be used as early as possible to find out information relating to the trip. This should include seeking information about issues such as excessive homesickness, difficulties with personal organization. For example, we assume every secondary school age student can tell the time but this may not be the case! This request for information should be reinforced at the parents' meeting

Time Differences

The PL should ensure that students are alert to time differences in other countries

Foreign language competence

Where possible, at least one member of staff accompanying the visit should be able to communicate effectively in the language of the countries to be visited.

Alcohol - Staff

The Invictus Substance Misuse Policy states; *When attending school trips, including residential visits either in this country or aboard, employees are considered to be working and so the consumption of alcohol is not permitted. However, during longer-term residential visits, more than two nights, "off-duty" time may be agreed by the Party Leader and during this time, alcohol may be consumed as long as it does not impact on the employee's ability to make professional decisions should they be required to be "on-duty". However, at least one member of staff must be alcohol-free at all time. It is the responsibility of the party leader to draw up a rota for this if necessary. Employees should not drink alcohol in front of the children even if deemed to be "off-duty". The party leader reserves the right to prevent any alcohol consumption by employees on a trip should it be deemed necessary to ensure the safety and welfare of all those on the trip. Inappropriate behaviour on trips may result in disciplinary action.*

Alcohol and Smoking – Students

Students should not consume any alcohol on school visits, even if they are over the legal age for consumption in the country being visited. Smoking/vaping is also not permitted.

Students contravening these regulations may put their own Health and Safety and that of other members of the party at risk. Sanctions will be imposed for any failure to comply and repeated non-compliance may result in parents being asked to remove their son/daughter from the group.

Passports / EHIC ***

Where a collective passport is not to be used, the PL should consider collecting in all the individual passports before the visit to ensure that these are not forgotten on the day. EHIC cards should also be collected in so that the PL can ensure they are valid.

Specific consent is needed to take a student abroad – the information sheet for visits abroad contains a relevant section.

Deciding who gets a place if a visit is likely to be over-subscribed***

The PL should discuss how to work the initial letter with the EVC. For example:

- **Either** - This visit will take students out of lessons for a significant period of time. We have therefore decided, following discussions with the governors that, unless there are exceptional circumstances, to be considered for a place students need to:
- **Or** - There are XX places available for this visit but it may be over-subscribed and we have therefore decided, following discussions with the governors that, unless there are exceptional circumstances, to be considered for the visit students need to:
 - have had a very good behaviour record since the start of the academic year
 - have had a very good attendance record so far this year (XX% or over)
 - be up to date with all deadlines in ZZZZ and have handed all ZZZZ work in on time so far this term
 - return both the consent form and the deposit by the deadline of XXX

If more than XX students meet these criteria, their names put into a hat and a draw will be held to determine which students get a place. After that, a waiting list will be established.

Please note that after your child has been offered a place, he/she will need to

- Maintain an very good attendance and behaviour record
- Continue to meet all ZZZZ deadlines.
- Meet all deadlines in relation to the visit e.g. return of forms and payment deadlines

If your child does not succeed in this, we may have to consider withdrawing their place and offering it to a student on the waiting list. Should this happen any monies paid will be refunded.

Medical Suitability for the Visit

If the activities for the visit will be strenuous, please ensure the following is added to your letter/consent form:

Letter

Medical Issues

Please note that this trip is not a “holiday” and will be very tiring. It involves a significant amount of walking, long days in a coach, etc. If your child is currently receiving medical treatment for a major medical issue, has recently received such treatment or has any long-standing medical needs, please tick the box on the consent form. This is to ensure we can have a more detailed conversation with you and make sure we can meet your child’s needs. A letter from the GP or consultant may be required in some cases in order to meet the requirements of our travel insurance company.

Consent form:

Medical Issues My child has or has recently had major medical issues. Please contact me to discuss these **YES / NO**

Cancellation Policy***

Parents must be informed in the initial letter and then again, in the second letter, confirming a place and what the tour company’s policy is in relation to cancellation. This can sometimes mean that a parent has to pay a significant percentage of the total cost even if their child does not travel. Parents are required to sign to show they understand the implications of this on the consent form.

9. JOINT VISITS INVOLVING MORE THAN ONE INVICTUS SCHOOL

Roles and Responsibilities / Procedures

Party Leader

If you are a Party Leader organising a joint visit you will need to:

- Email the EVCs at each school (see contact info at the end of this document) with a proposed visit form to ensure that the visit is possible, given each school's calendar etc.
- Plan letters, risk assessments etc. following the normal visits procedures of your school. These should be checked via your own EVC as normal
- Establish a named liaison person in each of the other schools involved – see below.
- Provide phone numbers/email addresses for each contact person so that communication can be maintained
- Send letters etc. to the named liaison person for adapting/distribution
- Complete Evolve, ticking the “joint visit” button on page 1 – you can only do this once student numbers from each school are known
- Ensure the EVC from each school know that Evolve has been done and approval will be needed. If staff from other schools are participating, the EVC will need to know so that the names of the participating staff can be added to Evolve.
- Complete normal visits procedures for own school re payments, consent forms, emergency contact info, medical info, staff and student briefings etc.
- Brief the liaison person re itinerary, risk assessment etc. in advance of the trip
- Brief ALL the students re this before the visit OR make sure the liaison person is aware they have to take on this role. For foreign and residential visits, a joint parents' meeting should be held
- Ensure all participants, staff and students, are aware of the “chain of command” re supervision – e.g. which adult is responsible for the H&S of which students
- Ensure first aid kit is available and identify a first aider for the visit if appropriate
- Ensure all staff participating are aware of emergency procedures plan
- Either identify own Headteacher as contact person in case of emergency and ensure this person has contact info for all participants OR ensure each school liaison person has established their own emergency contact person. The decision re this will probably depend on whether teachers from the other schools are accompanying the visit.
- Complete the Evolve evaluation after the visit

Named liaison person in each of the other schools involved

This person should ideally be a member of staff who will be accompanying the students on the trip if relevant. If not, it could be a colleague in the same subject area or the EVC. S/he will need to

- Liaise with the EVC of the home school
- Organise the distribution of letters and return of consent forms etc.
- Organise set up of parent pay (or equivalent) if required
- Communicate with the Party leader re numbers
- Organise the transfer of money between school if needed
- Make sure they have received enough information from the Party Leader re the itinerary, risk assessment etc. in advance of the visit
- Arrange briefing for students and staff before the visit if requested by the Party Leader
- Organise medical information and staff / student emergency contact info via the EVC
- If not participating in the visit, make sure that medical and emergency contact info is given to the Party Leader beforehand

- If participate in the visit, keeping a copy of medical and emergency contact info available during the visit.
- Make sure that emergency contact info is also given to the home school EVC and reception
- Establish an emergency contact person in the home school if asked to by the Party Leader and making sure they also have a copy of the emergency contact info

EVC at Party Leader's school

- Give initial approval for the visit to proceed
- Check letters, risk assessment in line with normal school policy
- Maintain contact with Party Leader re actions above in line with normal school visits policy
- Ensure medical information and staff / student emergency contact are organised as normal

EVCs at other schools

- Check calendars and seek guidance from other senior staff as required in order to approve the visit
- Add names of accompanying staff to the EVOLVE form
- Maintain contact with the school contact person re actions above in line with normal school visits policy
- Ensure medical information and staff / student emergency contact are provided as normal

Special arrangements for Regular, Routine MAT activities – e.g. INVICTUS music activities that take place during evenings or weekends, do not involve money or organised transport

Because of the frequency of such events, the following simplified arrangements will operate. As the Trust develops, other types of activity may be added to this category

- Parents must be informed on a termly basis about the events for that term. There is a sample letter that can be used for this purpose
- Medical and consent information will be sought on an annual basis for these events
- Routine rehearsals need not be put onto Evolve
- All other activities (e.g. concerts) must be put onto Evolve – this should be done as early as possible so that there is plenty of time for all the approvals to take place
- The PL must ensure there is adequate staff supervision for the event. The ratio may vary depending on the venue and performance schedule but as a general rule use 1:20.
- Standard risk assessments (which must be adapted for each event) are available
- The PL must take emergency contact information and medical information to both rehearsals and other events
- A named contact person (probably whoever normally fills this role in the PL's school) must have emergency contact information of all participants in events, which are put on Evolve – even if some of the participants are from different schools.

10. APPENDIX 1

ROLES AND RESPONSIBILITIES

At Invictus Schools, responsibility for all off-site activities has been delegated to the Educational Visits Coordinator (EVC). The choice of the EVC should be made on the following grounds:

"The EVC should be specifically competent. The level of competence required can be judged in relation to the size of the establishment as well as the extent and nature of the educational visits planned. Evidence of competence may be through qualification, but more usually will be through the experience of practical leadership over many years of off-site education. Commonly, but not exclusively, such competence will be identified in a person on the senior management team of the school."

Such a person should be an experienced Visit Leader with sufficient status within the school/establishment to guide the working practice of colleagues leading offsite activities. Since one of the main functions of the EVC is take a lead on assessing the competence of activity and visit leaders, it follows that the role should **not** be regarded as administrative. However, it is usual for larger establishments to appoint a two-person team to cover the range of EVC functions, with one of the team concentrating on the purely administrative functions.

Specific Responsibilities of the Principal – delegated to the EVC

- ensure that all LOtC activities comply with guidelines provided by your employer and are officially notified/approved as required by employer guidance.
- ascertain that all members of staff involved in LOtC are specifically competent to carry out responsibilities allocated to them.
- ensure that suitable child protection procedures are in place, including vetting at an appropriate level of all voluntary helpers.
- ensure that the Visit Leaders, assisting staff and voluntary helpers are appropriately trained (as required by employer guidance) and competent to carry out such tasks as they are allocated.
- ensure that sufficient time is assigned for staff to organise visits properly.
- support an apprenticeship /succession planning culture to ensure sustainable visits and the development of competent Visit Leaders
- ensure that visits are effectively supervised with an appropriate level of staffing.
- ensuring that visit information has been shared with parents and that consent has been sought where necessary.
- ensure that arrangements have been made for the medical needs and special educational needs of all the young people, and also address any inclusion issues.
- promote a staffing culture that encourages gaining formal accreditations in first aid, so enabling a visit culture that makes access to first aid more readily available.
- ensure that suitable transport arrangements are in place and meet any regulatory requirements
- ensure that insurance arrangements are appropriate and, wherever possible, are set up to reduce the burden of bureaucracy for all concerned.

- ensure that details related to the visit and participants (including staff) are accessible to a designated 24/7 emergency contact(s) at all times in case of a serious incident.
- ensure that there are contingency plans in place should the visit plan be significantly changed or cancelled (Plan B).
- ensure that arrangements are in place for the School Governing Board/Management Team to be informed of such visits as are required by the establishment visit policy
- be aware of the need to obtain best value. Appropriate consideration must be given to financial management, choice of contractors, and contractual relationships.
- ensure that establishment policy identifies the types of visit that require a preliminary visit and the processes required when a preliminary visit is not reasonably practicable.
- ensure that establishment policy formally adopts a set format for recording written risk assessments. Such RAs should be proportional, suitable and sufficient and based on the 'Principles of Sensible Risk Management'. The adoption of materials made available by the LA to reduce bureaucracy is good practice.
- ensure that, where the activity involves a third-party provider, appropriate assurances have been sought. Specifically note those national schemes that make seeking provider assurances unnecessary e.g. LOTC Quality Badge, AALS licence, Adventure mark, or a clear management Statement of Competence.
- ensure that all visits are evaluated with regard to best value, teaching and learning, quality experiences, and address issues raised by any serious incident that might inform the operation of future activities/visits.
- ensure that the establishment policy includes appropriate emergency procedures in case of a major incident.
- ensure that the establishment policy includes a procedure to ensure that parents are appropriately informed in the event of a serious incident.
- ensure that serious incidents are reported to the employer's Emergency Planning department to enable the employer's public relations unit to deal with the media.

Specific Responsibilities of the Governors

Governors should ensure:

- They have a clear understanding that the Board of Trustees are the direct employer of staff.
- They have access to and understand the LOTC Manifesto.
- They have access to both employer visit guidance and establishment visit policy.
- They have access to training packages to support employer guidance and establishment policy.
- Establishment policy clarifies Governing Board involvement in the visit approval process.
- There is an appropriate EVC in place, who has received employer-approved training.
- There are notification and approval processes both at establishment level and between the establishment and the employer.
- The establishment visit policy supports the principles of inclusion.

The role and functions of the EVC

An EVC should ensure that:

- He/she understands the Manifesto for LOtC and the supporting rationale
- He/she has attended such EVC training as recommended or required by your employer.
- Off-site and LOtC activities meet employer guidance requirements.
- The Principal, Visit Leaders, assisting staff and voluntary helpers understand that all staff involved in visits require access to training at an appropriate level to ensure that employers' guidance and establishment procedures are properly understood.
- He/she has an establishment visit policy.
- He/she supports the Principal with approval and other decisions.
- Off-site activities are led by competent leaders.
- Assistant Supervisors are competent to carry out the tasks to which they are assigned.
- He/she monitors visit planning and sample monitor in the field as appropriate.
- He/she organise the training of leaders and assistant leaders, including voluntary helpers.
- DBS checks are in place where required.
- Establishment policy provides sufficient guidance to visit and activity leaders regarding information for parents and parental consent.
- There is a 24/7 emergency contact, for each, visit and that emergency arrangements are in place.
- Medical and first aid issues are addressed.
- Emergency arrangements include emergency contact access to all relevant visit records, including medical and next of kin information for all members of the party and including staff.
- Visits and LOtC activities are, reviewed and evaluated, and this process will require the reporting of accidents and incidents.
- Visit policies and procedures are reviewed on a regular basis and immediately following any serious incident or systems failure.
- He/she keeps up to date via EVC training events and employer information updates.

The role and functions of the Party Leader –

There must be a named PL for every visit and this person is responsible for:

- Planning and organising the visit in accordance with school policy
- Ensuring that any providers used (coach company, tour operator, hotel etc.) are competent (e.g. do they have a trade license / H&S Policy / evidence of safety checks / insurance / list 99 checks / etc.)
- preparing a detailed plan of the visit to include a detailed itinerary and information about what the responsibility of every adult is from leaving school until their return
- taking day-to-day decisions during the visit
- ensuring all other accompanying staff are clear about their roles and responsibilities and understand that they are “in loco parentis”
- completing a risk assessment and discussing its contents with other staff
- briefing students and parents before the visit
- keeping students and staff fully briefed during the visit
- Providing the named contact person for visits extending beyond the school day with all necessary documentation.
- dealing with any emergencies which arise
- fulfilling the school’s financial procedures
- evaluating the visit as soon as possible afterwards

11. APPENDIX 2

OTHER ISSUES

Monitoring

It is a statutory requirement that an employer monitors (on a sample basis) the implementation of the guidance it issues and that such procedures are robust. For this to be effective, the main role of monitoring is usually delegated to establishments and needs to be driven by the EVC. To support this monitoring it is essential that:

- The EVC is able to influence the formal approval process
- All visits are subject to EVC scrutiny
- Arrangements are put in place for peer monitoring, on a sample basis
- Where possible, the EVC may sample monitor visits by field observation
- If the nature of the visit demands it, some visits will only be approved after planning consultation with the LA adviser
- The Governors will monitor this policy on an annual basis

Procedures for staff Induction, apprenticeship and succession planning

All staff involved in the organisation of visits must be specifically competent to carry out the tasks they are assigned. To ensure that this is the case, employer guidance should set clear expectation that there should be robust induction procedures in place at establishment level. This will usually require that staff identified as requiring practical training and experience as assistant leaders are given the opportunity to work within an apprenticeship model. Establishments should address a range of issues as part of structured induction and this should be clarified in establishment policy. EG

- Procedures are in place to ensure that prospective leaders and assistant supervisors know they must read relevant documents
- All new PLs are given training by the EVC before the visit starts
- Where possible apprenticeship programmes are in place to ensure succession planning. All new party leaders are required to work with an experienced colleague on their first visit
- Staff are recommended to attend Visit Leader Training if appropriate

Risk management and risk-benefit assessment processes and procedures

Effective risk management of visits will be supported in the following ways

- All staff, will be given specific training on risk management and risk-benefit assessment in the context of off-site activities
- This training will be kept up to date with HSE recommendations on "sensible risk management" based on proportionality and minimising bureaucracy.
- The Visit Leader will be encouraged to involve other staff (and young people where appropriate) in the planning and preparation of the visit, including the risk management and recording of the risk-benefit assessment(s). If this is not possible at the preparation stage, it is the Visit leader's responsibility that the risk assessment is shared with all relevant colleagues before the start of the visit.
- A standardised format for recording risk-benefit assessments (RBAs) is in place
- Bureaucracy has been minimised by adopting generic a RBAs and making use of any exemplar, event-specific RBAs that are made available in the procedures and during training

Requirements regarding provider assurances and preliminary visits

Visit Leaders should seek assurances from Providers about their competency. Where possible, to reduce bureaucracy for both Visit Leaders and Providers, Visit leaders should take advantage of national schemes that have been established to eliminate the need

For questionnaires and forms. E.g. LOtC Quality Badge, AALS Licence, Adventure mark and management Statements of Competence.

Holding one of the above is a credible assurance of Health and Safety, and Visit Leaders should seek no further verification. The LOtC Quality Badge also covers learning quality. In these cases, Visit Leaders should **not** ask for copies of risk assessment documentation.

If the provider does not part of one of these national schemes, other assurance will be required and details will be provided on request. In these cases, discussion will also be needed about whether a preliminary visit is needed.

12. MONITORING & REVIEW OF POLICY

This policy is reviewed every three years by Invictus Education Trust Board of Trustees. We will monitor the application and outcomes of this policy to ensure it is working effectively.