

# School Trips & Visits

## Procedure & Guidance

### Documentation Information

<b>Reviewed by</b>	S. Lane	<b>Last Reviewed</b>	March 2024
This document lays out the approach Ivanhoe School takes to this area/issue. It is not a policy, rather it seeks to establish some norms of practice to bring clarity and consistency. This document is not ratified nor reviewed on a cycle but is revisited as appropriate when there is a change in guidance at a Trust, local or national level			

As part of our vision, Ivanhoe School is committed to offering a wide range of curriculum-enrichment opportunities both in the local area and further afield:

#### *Our Vision:*

*At Ivanhoe School, we are on a journey to excellence and we commit to:*

*Providing a rich and creative teaching and learning community*

We believe that taking our students out of the traditional classroom and into the real world has numerous advantages (see diagram overleaf). To this end, we encourage our members of staff to organise and lead such ventures for the benefit of our students.

#### **Aims of these Procedures**

- To enable students to experience a wide range of learning outside the classroom. Health and safety measures will help leaders to manage any risks safely, not stop them.
- To support key adults in safely planning, approving, leading and evaluating all off-site trips and visits. ie. Trips Governor, Head Teacher, EVCs, trip leaders, trip administrators, other trip staff.
- To help students to learn to understand and manage the risks that are a normal part of everyday life. H & S procedures should always be proportionate to the risks of any activity.
- To support reasonable adjustments being applied for disadvantaged students so that equity can be achieved.
- To ensure that, whilst supporting the educational experiences a trip or visit can offer, the learning of other students back in school is disrupted as little as possible.
- To ensure that trips and visits are cost effective for both students and the school.

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## 1. Ivanhoe's Trips & Visits Procedures and OEAP Guidance

This document has been written following National Guidance from the Outdoor Education Advisers' Panel (OEAP) and Leicestershire County Council's model policy on the Management of Outdoor Learning and Off-site Activities.

This national online guidance resource [OEAP National Guidance](http://oeapng.info/) (Guidance for the Management of Off-site visits and LOfC (Learning Outside the Classroom) activities) is an invaluable reference document, which must be read alongside this document and followed. It has excellent sections for key adults to read depending on their role ie. Governor, Head Teacher, EVC, trip leader etc. It is available from: <http://oeapng.info/>

In the event of an apparent conflict between Ivanhoe's procedures and the National Guidance, then Ivanhoe's procedures must be followed and clarification sought from the Educational Visits Coordinator (EVC).

Please also read this document in conjunction with our:  
Ivanhoe's 'Guidance for Trip Leaders' document (appendix A)  
Duke of Edinburgh's Award Expedition Procedures (new for 2023)  
Charging & Remissions Policy  
Equalities Policy  
Safeguarding Policy  
Behaviour Policy  
Fire & Emergency Policy  
Business/Service Continuity Plan

## 2. Clarification of Roles

### Head Teacher

The Head Teacher must ensure that:

- They have read our Trips & Visits Procedures.
- All trips and visits comply with this guidance.
- They give final approval to all ventures submitted through Evolve, once the EVC has given initial approval.
- They have ascertained that all leaders are appropriately competent, confident and accountable to carry out the responsibilities they are allocated.
- They have clearly designated a suitable member of staff as the EVC and that the designated person meets the criteria listed in the National Guidance: '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 visits planned. Evidence of competence may be through qualification, but more usually will be through the experience of practical leadership over many years. Such a person should be an experienced Trip Leader with sufficient status within the establishment to guide the working practice of colleagues leading visits'.
- They have ensured the EVC has undertaken EVC Training as recommended.
- Where needed, they have access to expert advice such as from an accredited outdoor education adviser.
- Outdoor learning is included within the process of self-evaluation providing evidence that may support how it contributes towards school improvement and overall effectiveness.
- When they take part in a trip or visit, they and other members of the trip leadership team are clear about their role. If the Head Teacher is not leading the visit, they should follow the instructions of the designated trip leader (who should have sole charge of the visit).

- Suitable child protection procedures are in place, including vetting at an appropriate level of all adults including volunteers, helpers and visitors. Decisions need to be made about when these adults are engaged in regulated activity and so should be subject to Disclosure and Barring Service (DBS) checks.
- They have assigned sufficient time for leaders to organise trips and visits properly.
- They support a succession planning culture to ensure sustainable trips and visits and the development of competent leaders and EVCs.
- They support their EVC in ensuring that: all trips and visits are effectively supervised with an appropriate level of leadership, information has been shared with parents and consent has been given if required.
- Arrangements have been made for the medical needs and special educational needs of all participants and staff.
- Inclusion issues are considered alongside managing risk.
- Suitable transport arrangements are in place and meet any regulatory requirements.
- Insurance arrangements are appropriate.
- Details related to off-site trips and visits (including personal details of both participants and leaders) are accessible at all times to designated 24/7 Emergency Contacts in case of a serious incident.
- They obtain best value. Consideration must be given to financial management, choice of contractors, and contractual relationships.
- Where charges are made to parents, these are within legal and employer requirements. Proper procedures are in place to account for the visit finances.
- These procedures identify the types of visit that require a preliminary visit by staff.
- Risk Management is proportionate, suitable and sufficient.
- Where the trip or visit involves a third party provider: appropriate checks have been made and assurances obtained; a clear contract is in place setting out what the contractor is to provide; the provider holds sufficient indemnity insurance.
- All visits are evaluated against the visit objectives, using Evolve. Evaluation should also cover addressing issues raised by any incident and informing of future visits (near misses).
- There are contingency plans in place to deal with changing circumstances during a visit (Plan B).
- There are suitable Emergency Procedures in place for each visit and your Establishment has an Emergency Plan for off-site visits, including procedures to ensure that parents are appropriately informed in the event of a serious incident.
- Serious incidents are reported to the employer as required by your employer's guidance, meeting the requirements of RIDDOR.

Further advice about many of the issues in this list can be found in the [OEAP National Guidance](#)

### **Educational Visits Coordinator**

At Ivanhoe, the Head Teacher has delegated the role of EVC.

The EVC must ensure that they have access to expert advice from the Outdoor Education Adviser at LCC.

The key functions of the EVC are to:

- Ensure Ivanhoe's Trips & Visits Procedures are reviewed regularly and in line with recommendations made by LCC and National Guidance from the OEAP.
- Be a champion for all aspects of visits and outdoor learning.
- Challenge colleagues across all curriculum areas to use visits and outdoor learning effectively in order to provide a wide range of outcomes for children and young people and contribute towards school effectiveness.

- Support/oversee planning so that well-considered and prepared arrangements can lead to well-managed, engaging, relevant, enjoyable and memorable visits/outdoor learning.
- Mentor leaders and aspirant leaders, supporting their ongoing development and training and sample monitor their activity to identify any further training needs.
- Ensure that planning complies with Ivanhoe's agreed requirements and that the arrangements are ready for approval within agreed timescales.
- Give initial approval to all ventures submitted through Evolve before forwarding to the Head Teacher for final approval.
- Support the Head Teacher in approval decisions so that all those with responsibility have the competence to fulfil their roles.
- Ensure that activity is evaluated against its aims for learning and development, that good practice is shared and any issues are followed up and comply with statutory requirements.
- Keep SLT informed about the Visits/outdoor learning taking place and their contribution to school effectiveness.

### Trip Leader

Trip Leaders at Ivanhoe must:

- Read and follow our Trips & Visits Procedures.
- Be specifically competent for the type of visit, and for any activities they plan to lead.
- Be approved by the EVC and Head Teacher to carry out the lead role, including for any specific activities they will lead.
- Be able to use the chosen environment or venue(s) to provide a wide range of learning or development outcomes.
- Liaise with Ivanhoe's Educational Visits Co-ordinator (EVC) to ensure that the visit has clear aims and is planned to appropriately balance benefits and risks, and that all staff accompanying the visit meet our requirements.
- Plan well ahead to avoid time pressures compromising quality, workload and safety.
- Submit trip proposals on 'Evolve' in the July preceding the academic year the trip intends to run.
- Ensure that there is effective supervision.
- Take a lead on risk management. It is good practice to involve all the visit staff team to ensure wide understanding and to give clarity about what they need **to do**. It is also good practice to involve young people wherever appropriate.
- Define the roles and responsibilities of other staff and helpers (and participants) to ensure effective supervision throughout the visit, appointing a deputy wherever possible.
- Ensure that any Activity Leaders are competent and confident to lead their planned activities, and are approved to do so if this is necessary (e.g. for adventure activities).
- Ensure that child protection issues are addressed (e.g. good safeguarding practice is followed and adults are appropriately vetted and checked – work with Safeguarding Lead, Heads PA and EVC on this).
- Provide relevant information to other leaders including the aims and how they can contribute to achieving these, the location, the participants (age, health information, capabilities, special needs, safeguarding and behavioural issues)
- Ensure that informed parental consent has been obtained as necessary.
- Provide relevant information to parents and participants, and arrange pre-visit information meetings for residentials.
- Make sure there is access to first aid at an appropriate level.
- Ensure that if the visit staff team includes someone with a close relationship to a member of the group, this is managed to avoid any possible compromise of effective supervision.

- Ensure that all staff and any third party providers have access to emergency contact and emergency procedure details. What if you were incapacitated? Would other staff know how to respond?
- Submit the trip for formal approval through Evolve within agreed policy deadlines (see section 4 below)
- Evaluate all aspects of the visit, both during and after the event.
- Report any accidents, incidents or near misses.

### **3. Procedural & Planning Requirements**

It is essential to the smooth running of the rest of the school that trips be properly planned to ensure minimal disruption to all, both those on the trip and those left behind.

Leaders of any trip should be an employee of Ivanhoe School. Accompanying adults who are not employed by Ivanhoe School must have a current DBS certificate.

Early Career Teachers are not permitted to *lead* a trip until they have accompanied three other trips and thereafter at the discretion of the Head Teacher/EVC. Experienced staff, who are new to the school, should have completed two Ivanhoe trips before they become the lead member.

Ivanhoe has two trained EVC's (Educational Visits Co-ordinators), Mrs S Lane (Assistant Headteacher), and Mr A Stevenson (Head of Progress).

- Staff hoping to run a trip should be well organised and plan ahead. After discussion and agreement in principle from the EVC, a detailed trip proposal must be completed using the Evolve System.
- A 'balance sheet' should also be completed at this time and handed to Laura Tickle for checking. These two items will usually be done in the July before the academic year the trip will be run. This applies to day trips and residential.
- The 'Guidance for Trip Leaders' (appendix A to this policy) must then be adhered to.

If the trip is residential or adventurous eg. Beaumanor/ Campout, the Evolve form must be submitted to EVC for final approval **at least 8 weeks** before the venture, thus allowing EVC, Head Teacher and LCC H & S Team to check and authorise.

If the trip is not residential or adventurous, the Evolve form must be submitted to EVC for final approval **at least 48 hours** before the trip departs.

- Once permission to proceed has been given in principle, regular meetings with the EVC must be held to ensure that they can monitor the planning and support the trip leader.

#### **Parental Consent and Medical & Contact Information**

The Education Act 2002 says, "schools are not required to obtain consent from parents for pupils to participate in off-site activities that take place during school hours and which are a normal part of a child's education, such as local studies and visits." We do not ask parents for consent for individual trips that are part of our core curriculum, unless they are; outside school hours, residential or involve a slightly higher level of risk, e.g. outdoor pursuits day trips. However, it is imperative that all details of a trip, including any associated costs, are communicated to parents in a timely manner.

For non-residential trips, leaders will take student medical and parental contact details from our data management software (Arbor). Parents/carers will be contacted via Arbor on a half-termly basis to check this is up-to-date.

For residential trips, leaders will ask parents to complete an enhanced consent, medical & contact information form.

This medical and contact information will only be used in the event of an emergency situation and will be kept and stored in compliance with The General Data Protection Regulation (EU 2016/679) “GDPR”. For more information, refer to the school’s privacy policy, which can be found on the school’s website.

- All trip letters to parents must be checked by one of the EVCs in advance of sending to parents via Arbor.
- Staff must carry a school trip mobile phone and use this for communications during the trip as well as for taking trip photos. Staff should avoid using their own devices except, for example, in an emergency situation.
- Staff must be aware of any students on the trip for whom we do not have photo/video/media consent.
- We hold an annual travel insurance policy, which is available to view on the school’s website.
- We work to the recommended supervision ratio of: 1:15 for day/evening/non-adventurous trips and visits, 1:10 for adventurous day trips and residential.
- High quality communication is essential at every stage, with the EVC, with the trip staff, with students, with parents, with the wider school staff and trip admin staff. Use [tripsteam@ivanhoe.co.uk](mailto:tripsteam@ivanhoe.co.uk) when emailing, wherever possible.
- On departure, trip leaders must complete a ‘signing out’ sheet at reception, leaving an accurate register of which students they are taking on the trip (see Appendix B).
- Seatbelts must be worn at all times in vehicles.

### **Day Trips and other visits within the school day**

We have a number of day trips during the year and some of these include whole or part-day visits as part of our core curriculum. We encourage all students to take part in these visits to support their learning in a range of subjects.

The current programme for Day Trips can be seen on our website.

### **Residential Trips/Trips Abroad**

For those students and staff who go on residential trips, the outcomes are, almost without exception, highly positive. However, we must take into account the impact of staff absence on the rest of the school when planning trips for each year.

To this end, we will adhere to:

- No residential trip shall exceed 3 school days. Trips can be longer than this but would have to incorporate weekend or holiday days.
- The proportion of *teachers* in any Staff Trip Team should not typically exceed 50%. Cover Supervisors count as teachers in this respect.

Trip Leaders must keep a minor incident/accident diary, which is reported upon return to school.

If for any reason a student is unable to return with the main party, then a member of staff must remain with them to accompany them on the return journey.

### **Residential Trips typically offered at Ivanhoe School**

Our core offer to students includes a wide number of residential per academic year, across KS3. Our offer to KS4 students is developing as we move through age range change. We aim to provide a mix of 'cultural' and 'outdoor pursuits' themed trips.

The residential trips offered each year can be seen on our website and a typical pattern is shown below:

#### **Year 7**

Outdoor trip: Y7 Campout

#### **Year 8**

Outdoor trip: Survival Skills Residential

Cultural trip: London Experience

#### **Year 9**

Cultural trip: Whitby/Scarborough Trip

Outdoor trip: Plas Gwynant (Wales)

#### **Year 10/11**

Cultural trip: WW1 Belgian Battlefields Trip

Trips for each year group will be launched at the same time as each other, to allow students and parents to make informed choices and express their preferences. Leaders will do their very best to create as many places as possible but we are often oversubscribed, restricted by venue numbers, operational or H & S constraints. In the event that trips are oversubscribed, leaders will work together to choose students by random draw. Parents of all applicants will be informed of the result of the draw, and support put in place to help anyone who was unsuccessful. For older students, consideration will be given to students who were not 'drawn out of the hat' for a previous year's residential.

In addition to the 'core trips', the PE Department offer a 3 year cycle of events for extra-curricular club members (rugby, football, netball & basketball).

The availability of all of these residential trips is down to the availability of accommodation, activities and staff and it may not be possible to offer the same trips with the same number of places each year.

### **Students Travelling in Cars**

Students should where possible travel on a coach organised by the school. On rare occasions (mainly because of low numbers), students sometimes travel in cars. Where this occurs:



- Parents must be advised who the driver will be and agree to this arrangement.
- Staff must hold the relevant car insurance for business use and check the school's safeguarding policy to ensure they are not putting themselves or the students at risk.

#### **4. Monitoring Arrangements**

Our Governing Body (Trips Governor) will ensure that trip leaders, EVCs and the Head Teacher are all following the procedures herein – see section 4. They will have access to Evolve so they can see all trip planning and approvals. The Head Teacher will monitor the work of the EVC.

The EVC will monitor the work of trip leaders and evaluate the impact of trips on students and young people, through Evolve. Evidence of this impact will be brought to SLT/Govs for review annually. The EVC reserves the right to drop in on any trip to quality assure the experience.

#### **5. Induction Training / Succession Planning**

We have a thorough approach to induction training for staff taking part in trips, through peer mentoring, to ensure that all colleagues are both competent and confident in their ability to do so. This applies at all levels from first time participant to aspirant trip leader, to experienced residential leader and EVC. Planning for trip leaders and EVCs into the future is an integral part of our trip systems at every level.

#### **6. Risk Management**

Facing and overcoming risks is a part of everyday learning and whilst we cannot mitigate every risk, nor should we seek to, we must carefully assess the risks involved when undertaking an educational visit. These risks must be weighed against the potential benefits of any activity. Risk management is an ongoing process that starts with any trip proposal, is continuous throughout the event and does not finish until the visit is complete and thoroughly evaluated.

The risk management process at Ivanhoe is there to safeguard everybody but should not be overly bureaucratic.

At Ivanhoe, we consider there to be two parts to the risk management process. The first is to ensure that any external providers we are using have a clear risk management plan, which is to be obtained and uploaded to Evolve. Risk management plans need to consider the trip destination's laws eg. European Fire Safety. The second part is to identify those risks for which Ivanhoe staff have responsibility eg. travel arrangements, student-specific needs, arrangements for free time.

- Template risk management plans can be found on Evolve (as well examples from previous trips for staff to edit)
- Staff training in risk management will take place during the regular meetings between trip leader and EVC.
- Completed risk management plans must be uploaded to Evolve and checked by EVC during the approval process.
- Once approved, risk management plans must be shared with all visit staff and relevant risks shared with parents and students.
- On return from a visit, trip leaders must evaluate their risk management plans, and include any changes needed in future due to possible 'near miss' incidents.

#### **7. Assessing Venues and Providers**

All visits should be thoroughly researched to establish the suitability of the venue, seeking any information specifically aimed at helping Trip Leaders to manage their visit and to check that facilities and third party provision will meet group expectations. Accurate and detailed information gathering is essential in assessing the requirements for effective supervision of students and to ensure that visit objectives will be met. When selecting venues and providers, trip leaders must also consider the inclusion of all students attending the trip. (See Section 12 *Inclusion* for further guidance).

Wherever reasonably practicable, every effort should be made to carry out a preliminary visit, especially to new venues. Many venues and providers offer free “teacher planning” visits so it is advisable to check this with specific locations. Trip Leaders wishing to run visits to new venues or to venues where significant changes have been made since the last visit (e.g. construction work) must discuss the need for a preliminary visit with the school’s EVC. (See Section 4 *Procedural & Planning Requirements* above for further guidance).

For visit locations that will serve as a **venue only**, i.e. where Ivanhoe School staff will lead activities, Trip Leaders should ensure that locations have appropriate capacity, facilities and availability for such activities. Ivanhoe staff leading activities should be competent in leading their respective activities.

For locations that will serve as an activity **provider**, the Trip Leader should make use of nationally accredited, provider assurance schemes. Such schemes could include the Learning Outside the Classroom (LOtC) Quality badge, Adventurous Activity Licensing Service (AALS) or other National Governing Body qualifications (E.g. RLSS UK for Lifeguarding qualifications).

Through Evolve, Trip Leaders can check a provider’s status and relevant qualifications. If a provider does not have an up-to-date LOtC Quality badge, a **Provider statement** must be completed. An editable version of this can be found in the “templates/forms” subsection of the “Guidance, Policies and Documents” area on Evolve. This document has sections for both the Trip Leader and provider to complete and is for the provider to declare to the school that they have appropriate arrangements in place in regards to public liability insurance, health, safety and emergency policies and relevant licenses, amongst other things. Trip leaders and EVC must check these arrangements, keeping destination in mind eg. Are European fire safety requirements as stringent as the UK?

## 8. Volunteers

Where there is a need to use volunteers to accompany a trip, the following procedures must be undertaken with satisfactory outcomes before the volunteer can accompany students on the trip / visit.

- They must meet with the DSL for safeguarding responsible for recruitment to check ID, and to check against the “barred” list.
- When required an enhanced DBS check must be completed, the original certificate seen and an assessment of suitability by the DSL for recruitment made.
- The volunteer must receive the minimum induction and training for the trip by the trip leader.
- Ivanhoe School does not allow volunteers to act as a Trip Leader.
- The volunteer must meet with the trip Leader and EVC to assess their competency to carry out their assigned role.
- Volunteers who do not have an enhanced DBS certificate must not be left unaccompanied with students, and must be supervised at all times.

## 9. Emergency Procedures and Incident Reporting

All trip leaders must have an agreed emergency contact back at Ivanhoe with whom they can seek support in the event of an emergency incident. This should ideally be a member of SLT or trained EVC. The contact details of this person must be recorded on Evolve.

Prior to any visit departing, Trip Leaders should work with their trip staff and the EVC to risk assess and rehearse possible emergency scenarios. We will use the National Guidance 'Emergency Action Cards' as guidance. Depending on the venue of the visit, Trip Leaders must consider the possibility of a terrorist threat (eg. London trip, stadium visit) and work through the National Guidance on Evolve and the police 'Run, Hide, Tell' campaign training.

In the event of a very serious accident, we have the support of Leicestershire County Council's Resilience Partnership Duty Officer, formerly known as Crisisline. All staff on trips must have the 'Crisisline' number in their phones.

In the field, Trip Leaders must carry and follow the 1-page, Ivanhoe School Trip Emergency Plan (Appendix C).

As a brief overview, the plan is:

- Assess the situation
- Safeguard the uninjured members of the group to avoid further injury
- Attend any casualties
- Notify emergency service
- Notify school
- Notify the Resilience Partnership Duty Officer (Crisisline).

On completion of a visit, Trip Leaders must review all aspects of the venture– impact, financial, safeguarding, safety, medical and feedback to relevant colleagues. Reports should be completed in the case of serious incident/medical emergencies and new learning shared with the EVC and applied to future risk management plans.

## 10. Behaviour

It is our aim that everyone attending our trips and visits is able to enjoy and gain the maximum benefit from the experience. This is only possible when the whole group maintains a high standard of behaviour and follows The Ivanhoe Way. One of the best ways to help ensure a fantastic trip is setting out our expectations of students before they go. In most cases, these expectations will be the normal school rules with some additions depending on the activities planned (e.g. correct use of, and not tampering with, any safety equipment provided).

Trip Leaders must ensure that students and their parents/carers are informed of the behaviour expectations in advance of the trip.

For trips and visits during the school day and non-residential visits extending beyond school hours, this will most likely be done through lessons (if it is a curriculum-linked visit) or through a break or lunchtime meeting (if deemed more appropriate). Informing parents should be done through Arbor.

For residential trips, this must be done through use of a *student code of conduct and contract*. This document (a template for which can be found on the “Guidance, Policies and Documents” section of Evolve) clearly sets out more formally and in greater detail the expectations of all students attending the trip and their parents and sanctions if our behaviour standards are not met. Both students and parents are required to sign and return the document as a condition of going on the trip.

If a student fails to comply with instructions, behaves in an inappropriate manner or fails to meet our behaviour expectations in any way, the following sanctions may be applied: a timeout from a specific activity, loss of free time, withdrawal from evening or daytime activities and in severe cases, parents/carers will be required to collect their child at their own expense.

To support these behaviour practices, careful planning should be undertaken to consider possible behaviour “hot-spots”. These hot spots could include, but are not limited to:

- Coach journeys
- Transitions from one activity to another
- Extended periods of time in one location
- Free time
- Overnight / bedtime

Careful planning should also be given to the use of mobile phones and other electronic devices on all visits. Trip Leaders must consider whether, and if applicable *when*, to allow the use of mobile phones and other electronic devices. On residential trips, as a general rule, mobile phones and other electronic devices should be collected in by the trip leader for safe storage overnight. This is primarily to ensure that students get a good amount of sleep and are not using their devices throughout the night. Students and parents/carers must be informed that mobile phones and other electronic devices are taken at their own risk and that the school’s insurance policy does not cover these devices in the event of loss or damage. Careful consideration should be given to the use of mobile phones and other devices with a camera if there are students on the trip whose photographs cannot be published on external media. If students are misusing their devices, staff should apply appropriate sanctions as listed earlier in this section and/or confiscate them for an appropriate duration of time, or for the remainder of the trip.

Fostering and maintaining high standards of behaviour is the responsibility of all members of staff accompanying a trip, regardless of their role within the school. Colleagues on trips and visits should uphold the rules put in place and support one another in doing so. If any issues arise, staff should first speak to the Trip Leader. Staff must keep a log of any serious behaviour incidents, report them to the EVC and, if applicable, record these on Arbor when they return.

## **11. Inclusion**

Most visits are open to all students who follow our school rules, but places may be limited for organisational reasons, and it may be the case that a visit is designed for a specific group of students. Target groups must be clearly identified on all letters to students and their parents and trip leaders should be happy to discuss selection criteria in an open and transparent way.

Usually the number of places on a trip will be matched to the number of students wishing to go. This is especially true for trips that are directly linked to a subject’s core curriculum eg. National Space Centre (Maths). On these occasions, as many students as possible will be strongly encouraged to take part. Where a trip has a limit on numbers eg. we received 10 free tickets to an event, and a visit

is oversubscribed, the general principle will be that students will be chosen by lottery, unless there is a particular reason to do otherwise.

Consideration needs to be given to our provision for transgender students. 'Transgender' is used in this document as an umbrella term for all students experiencing gender-related distress or otherwise questioning their gender, whether or not they clearly have the legally defined protected characteristic of 'gender reassignment'.

In reaching decisions about the appropriate accommodation of trans students on residential trips and DofE expeditions, Trip Leaders will need to consider the privacy interests of all students involved, to conduct appropriate risk assessments and to consider proportionality and consent, taking into account the needs of all students affected.

<https://safeschoolsallianceuk.net/wp-content/uploads/2022/11/Guidance-for-maintained-schools-and-academies-in-England-on-provision-for-transgender-pupils.pdf> (page 27)

## 12. Insurance

Ivanhoe School is insured under the Government RPA (Risk Protection Arrangements) scheme for Academies.

Ivanhoe also has separate RPA Overseas travel insurance and the Local Authority on and off-site Insurance. Details of the Insurance can be obtained from The Business Manager.

## 13. Finance

Charges for visits must comply with Ivanhoe Charging and Remissions Policy.

The Accounting Officer and Business Manager have the delegated power to waive any charges as appropriate in cases of financial hardship.

### Requirements for accounting, banking and reporting

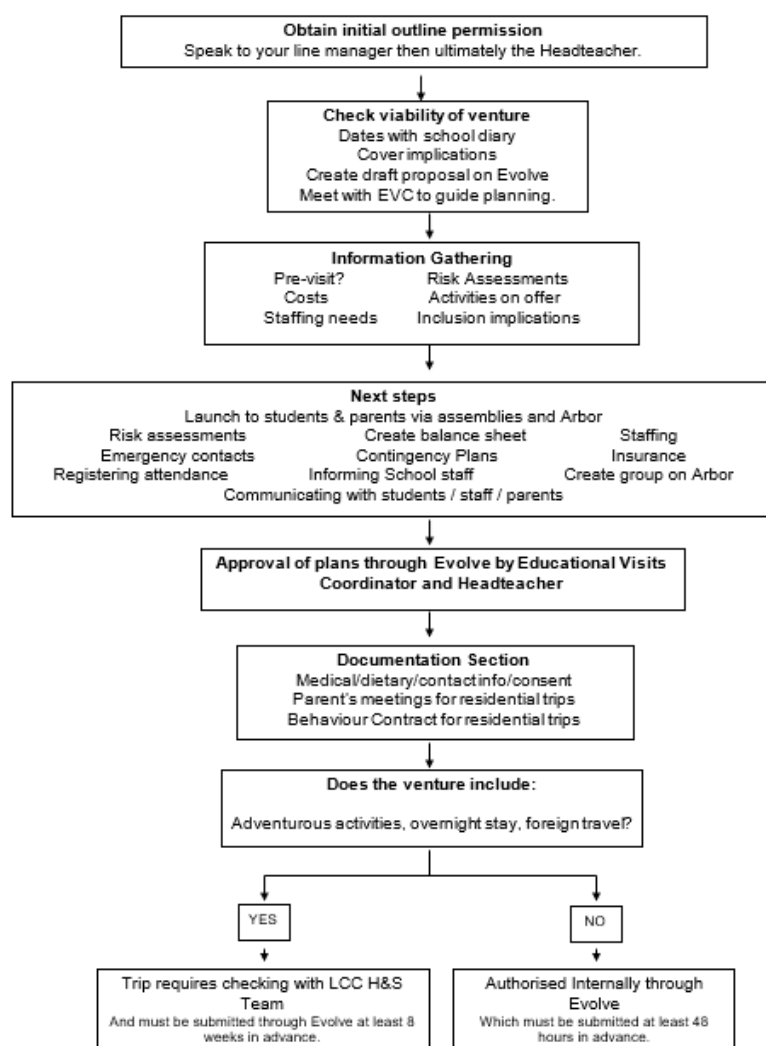
- A Balance Sheet must be completed during the planning stages of the trip, checked through with the Business Manager, and amended as appropriate.
- The Finance team must be given financial details of the trip as soon as it is planned and approved. The Business Manager's approval must be confirmed before parents are notified and money is collected.
- Letters are sent to parents requesting payment or for voluntary contributions.
- All monies received for trips are paid to the finance office which collects the cash.
- The finance office is responsible for keeping adequate records of income and expenditure on a trip/class list. All receipts are banked intact. The finance office prepares a final income and expenditure account for each trip which has taken place and reports these to the business manager.
- Once the trip has taken place, a final balance sheet must be submitted to the finance team within 2 weeks of the trip's return.
- The contingency fund (residential) must only be spent on emergency expenditure. Receipts must be sought. Unspent money must be brought back to school and given back to the finance team.
- No visits are allowed to make a financial profit. Unspent money over £5 per student is paid back to the student/parent.

- The Business Management and Audit Committee ensures that money collected and expended for each trip is in accordance with the academy's charging policy

## 14. APPENDIX A – Guidance for Trip Leaders

Taking our students out of the traditional classroom and into the real world has numerous, wonderful advantages that should always be encouraged. However, whether you're thinking of arranging a short visit to a local church/competition or an overseas residential, the amount of paperwork and bureaucracy required to take children off-site can seem off-putting. Additionally, you might question your own competence / experience to lead a trip. Hence why this simplified guidance document has been produced, which incorporates Ivanhoe-specific arrangements. This should always be used in conjunction with our Trips and Visits Procedures, which can be found on the website.

### Section 1 – Outline of Process & Permissions



### Section 2 – Planning The Trip

The following checklist has been modelled on the LA guidance for Trip Leaders.

Use it to guide your planning and bring it to discussions with the EVC.

### **TRIP LEADER**

- Is there a clearly identified trip leader, sufficiently experienced and competent to assess the risks and manage the proposed visit or activity?
- Has a deputy trip leader been appointed (**essential**) ?

### **PURPOSE**

- Is there a clearly identified purpose for the whole programme and any of its constituent parts, appropriate to the age and ability of the group?
- Has due consideration been given to equality of opportunity?

### **IVANHOE TRIPS AND VISITS PROCEDURES**

- Has the trip leader read the Trips and Visits Procedures?
- Have **all other accompanying staff** read the Trips and Visits procedures?

### **PRELIMINARY VISIT**

- Has the trip leader made a pre-visit to the site or centre, to check arrangements and risk management plans if necessary?

### **STAFFING**

- Are members of staff, instructors or adult volunteers leading adventure activities suitably qualified and experienced, ie.competent to do so?
- Have members of staff or volunteers been subjected to relevant safeguarding checks?
- Does proposed staffing consider equality of opportunity?
- Does staffing include male and female supervision, where necessary?
- Have acceptable arrangements been made to cover staff on trip?

### **STAFF:STUDENT RATIO**

- Will the group have an acceptable staff/student ratio necessary for the activities proposed? (See procedures)

### **LOCATION**

- Is the proposed location of the visit suitable for the activity to be undertaken and manageable for the group?

### **ADVICE**

- Has necessary advice been sought? Consider experienced colleagues and the EVC. For more adventurous ventures, the Outdoor Education Adviser (contactable through Evolve) may have to be included at the planning stage.

### **AUTHORISATION**

- Have correct permissions been sought? (see section 1- Internal or External?)
- Has this been submitted through Evolve?



### VENUE

- Does the visit involve adventure activities booked through commercial, charitable or private providers? (Eg PGL)
- If so, do they hold an up-to-date LOTC Quality badge?
- If not, a Provider Form will need to be completed. (Template on Evolve).

### RISK MANAGEMENT PLANNING

- Has the trip leader (with support from other staff) assessed the risks involved in all aspects of the activity or visit for which they have responsibility and recorded the significant findings and plans?

### THE PROGRAMME

- Is specific Personal Protection Equipment needed?
- Will another provider be offering additional appropriate equipment?
- Are the young people prepared for and physically capable of taking part in the proposed activities?
- Is the programme suitable for all participants including SEND students?
- Is there an alternative programme planned in the event of poor weather, for example (a Plan B) ?

### PARENTAL CONSENT & ORGANISATION

As per the Trips and Visits Procedures, we need to obtain additional consent for trips which are outside of school hours, include high risk activities, are not in the local area or are residential.

- If applicable, has parental consent been obtained for the visit?  
Have details been collected from parents and analysed concerning:
  - Medical conditions & medication required?
  - Special dietary requirements?
  - Parental contact information?
- Has this info been communicated to providers (as appropriate) and to all supervising staff?
- Is special training necessary e.g. Epi-pen?
- Have sufficient First Aid arrangements been made?

### TRANSPORT

- Is appropriate and legal transport available? Check on seatbelts, drivers' hours and business-use insurance (own car).
- Are there suitably qualified drivers for any planned minibus journeys?
- Is there a contingency plan in the event of a delay or early return?  
For admin support, contact the Trips Team.

### FINANCE & INSURANCE

- Have adequate arrangements been made to finance the visit and manage finances? Speak to the Laura Pearson-Tickle for guidance on collecting money and completion of your balance sheet (draft on Evolve).  
Please do this **absolutely as soon as possible** so we can set early deadlines for money return. We have a comprehensive insurance Procedures for trips and visits. Any questions, speak to Laura Pearson-Tickle.

- Has a 'contingency fund' been factored into the cost of the trip per student? e.g. if the coach breaks down on the way home from Belgium, could you pay for the students to have a meal? Trips should not ultimately make a profit, so on your return you may need to consider refunding some money.

#### **PREPARATION & COMMUNICATION**

- Have you allowed adequate time and opportunity to prepare for the trip?
- Have other staff and colleagues whose work may be affected been consulted / notified of planned arrangements?
  - e.g. Are copies of your letters on Evolve?
  - Have kitchen staff been notified of trip / Grab Bag requirements?
  - Has cover been arranged for accompanying staff, where necessary?
- Have you sent relevant letters and information to parents/carers via Arbor?

#### **BRIEFING FOR YOUNG PEOPLE**

- When will the young people be briefed before the visit / trip? (form time, lessons, break, lunch?)

#### **BRIEFING FOR STAFF**

- When will the trip leader brief adults and voluntary helpers and issue them with appropriate itinerary, student and risk management plans? Consider those staff left behind as well as those accompanying the trip. Good practice is to consider an emergency 'scenario' as a training activity.

#### **BRIEFING FOR PARENTS**

- When will there be a parents' evening (for residential trips) so parents can meet the staff accompanying the venture and be kept fully informed?

#### **EMERGENCY CONTACT AT BASE**

- Has a named point of contact been identified back at base in the event of an emergency / breakdown, who has a contact list of the group members, their parents, **including staff**, and a programme of the group's activities?
- Are all staff aware of procedures and relevant phone numbers in the event of an emergency?
- Have all supervising staff been issued with the TRIP EMERGENCY PLAN and the Resilience Partnership Duty Officer (LCC CRISIS LINE) number and briefed on its use?
- Are staff aware of the medical / dietary /contact details of young people and EACH OTHER?
- In the event that a trip leader becomes incapacitated, could all other accompanying staff members respond appropriately to the emergency?

**Thorough completion of this checklist will give a competent party leader the reassurance they need that everything has been considered to ensure maximum enjoyment and safety for staff and students alike.**

#### **Section 3 – Doing the Trip**

Prior to departure, check through the following 10-item list, to help you and your party have a wonderful hour/day/week out! Delegate jobs to your deputy / accompanying staff to ease the workload.

- Have you and your staff got copies of all the paperwork they're going to need (should you be unavailable) and are they fluent in your planned risk management plans?
- Has the (mountain) weather forecast, water temperature etc been checked, if applicable?
- Has a list of participants been emailed to all staff?
- Have you collected from reception: first aid kits including sick bags?
- Do the office / EVC know your 'Emergency Contact at Ivanhoe' arrangements?
- Have registers been handed in before departure and signing out sheet completed?
- If in a vehicle, are all your students sat down and seat belted, and are all the aisles clear?
- Remember, **RISK MANAGEMENT** must be an **ongoing** process throughout the day / week, as you face situations you may not have been able to plan for. Don't be rushed into decisions, consult your team.
- Keep a brief diary or incident log (especially on residential), keeping track of any problems, accidents, upsets, behaviour incidents etc to refer back to at a later date, if required.
- Sit down, relax, reap the rewards of all your planning, and take lots of pictures!

#### **Section 4 – Reviewing the Trip**

After all your hard work and a safe and happy return from what we hope was a wonderfully successful trip, the last thing you'll probably feel like is more work! But there are just a few things that need to be done to celebrate your successes and learn from any mistakes, especially if you intend to seek permission to run the trip again. Reviewing the trip **as a staff team** will not only ease the workload but allow you to gain perspectives you may not otherwise see. Perhaps you could also seek the students' opinions. Again, I have presented these as a checklist:

- Have you arranged a staff team meeting to review the trip?
- Have you sought your students' opinions?
- Have you completed the Review section on Evolve?

- Have arrangements been made to inform the Headteacher, EVC and LA of any accidents, incidents or near misses occurring during the venture? (So we can all learn from them)
- Have arrangements been made to have Risk Management Plans updated to reflect any accidents, incidents or near misses from the venture?**
- Have relevant staff got their copies of any accident forms you've been asked to complete?
- Have other records been completed relating to equipment or vehicles?
- Has the financial balance sheet been completed and returned to the Laura Pearson-Tickle? Do you need to consider reimbursements?
- Have arrangements been made to celebrate your successes:
  - Report to Headteacher, Governors, EVC and all staff.
  - Media release to Communications Officer (e.g. Twitter, newsletter)
  - Write up / photos for Ivanhoe newsletter
  - Write up / photos for Ivanhoe website
  - Photos placed on 'big screens'. (See Communications Officer)
  - Photos shared with students.

**15. APPENDIX 2 – Signing Out Slip**

**IVANHOE**  
SCHOOL  
A journey to excellence

TRIP/VISIT SIGNING OUT SLIP

Trip Leader: \_\_\_\_\_

Trip: \_\_\_\_\_ Date: \_\_\_\_\_

Please complete this quick tick sheet at reception as you hand in your trip register:

- I have handed an accurate register of students and staff to reception
- I am in possession of all student medical/contact information
- I have read and shared all risk assessment documents
- I have considered first aid provision and have checked students have medical equipment, if required e.g. epipen
- I have my 'Crisis Line' card/or have the number in my phone

Trip Leader signature: \_\_\_\_\_

## 16. APPENDIX 3 – Trip Emergency Plan

