



# Tudor Grange Academies Trust

## Educational Visits Policy

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## 1 Introduction

### 1.1 Statement of intent

Tudor Grange Academies Trust (TGAT) believes that educational visits are a core element of pupils' education and is committed to ensuring that opportunities for participation in good quality visits are maximised.

It is TGAT's intention that all practicable steps will be taken to meet statutory requirements, recognised codes of practice and government guidance in establishing a safe and healthy environment on educational visits.

TGAT believes that participation in high quality visits by pupils and staff will enhance development and wellbeing, promote positive interactions between pupils and staff and will also improve overall school performance and ethos.

TGAT will ensure that each academy is provided with sufficient resources to plan and conduct high quality educational visits and that staff will be provided with training and advice to organise and manage them safely. TGAT will also ensure that through academy leadership, all staff will know they have a duty to take reasonable care to avoid injury to themselves and others, and to co-operate with the academy management to ensure statutory duties and obligations are fulfilled.

### 1.2 Policy aims

This policy aims to:

- outline TGAT's requirements for planning, approving and running educational visits;
- detail the procedures for ensuring suitable and sufficient risk assessment is carried out for each educational visit;

- detail who is responsible for what aspects of educational visit safety management.

### **1.3 Policy scope**

This policy applies to all TGAT establishments and all educational visits, defined as learning activities, that take place beyond each academy's premises. It does not apply to:

- work experience, which has a separate policy and separate government advice;
- local, frequent sporting activities or physical education (PE), as explained below;
- activities conducted outdoors but within an academy's boundaries, as the safety of these is managed under standard academy policies and processes.

As above, the risk management of all PE fixtures falls outside this policy as sporting activities come under the remit of the PE department, thus teachers leading or supervising PE fixtures outside the school grounds need to follow the guidance of their professional training and the Association for Physical Education. A separate document outlining the process for the authorisation of PE Fixtures by PE heads of department has been sent to all academies and can also be found on the 'TRUST – Educational Visits' Teams group. The risk management of the travel to and from PE fixtures comes under both the PE and minibus/transport policy or procedure for each academy. Any other, non-sports fixture trips undertaken by the PE department are educational visits and should be approved as such.

Combined Cadet Force (CCF) activities and visits also fall outside of this policy. The process for authorising these activities is managed by the Ministry of Defence (MOD) and is robust and detailed. However, there remains a requirement for each academy to be aware of when staff and pupils are off-site on CCF activities, to know the outline details and to retain risk-management control of any element that is not approved by the MOD, such as academy-organised transport. To that end, a CCF Visits Notifications Process has been implemented in the relevant academies. A copy of this can also be found on the 'TRUST – Educational Visits' Teams group. This 'CCF Notifications Process' is subject to review and may be changed if it is deemed that a more appropriate way of ensuring academy oversight is available.

This policy is informed by DfE guidance - ['Health and Safety: on Educational Visits November 2018'](#) and will be reviewed annually or after any changes of legislation or approved codes of practice. This policy is also informed by the Outdoor Advisers' Panel [National Guidance](#), to which Educational Visit Coordinators (EVCs), Visit Leaders and others should refer.

### **1.4 Educational Visit objectives**

Every educational visit must have clear aims and objectives designed to support and enhance curriculum delivery. Clear curriculum links, identifiable in the individual academy's curriculum programme, should be set out in eVisit, the external IT platform used by TGAT to record and manage key educational visit data.

## **2 Roles and responsibilities**

The specific roles and responsibilities of each stakeholder are outlined below.

### **2.1 The CEO and Trust Board**

The Health and Safety at Work etc Act 1974, places overall responsibility for health and safety with the employer, which is the Tudor Grange Academies Trust (TGAT). To meet these

responsibilities, TGAT will:

- 2.1.1 provide an Educational Visits (EV) policy and ensure it is reviewed at least annually;
- 2.1.2 set procedures for the planning, management and approval of EVs;
- 2.1.3 ensure staff are adequately trained, guided and supported so they can plan and carry out safe, educational visits that are in line with the TGAT policy;
- 2.1.4 ensure individual establishments are suitably resourced to comply with policy requirements;
- 2.1.5 determine the charging and remissions policy and appropriate procedures for the financial management of visits having regard to any government guidance;
- 2.1.6 monitor compliance by each academy.

## 2.2 The Operations Committee

The Operations Committee will ensure that:

- 2.2.1 TGAT EV policy and procedures are determined, implemented and reviewed annually;
- 2.2.2 staff are adequately trained and supported;
- 2.2.3 there is a clear approvals procedure in place for EVs;
- 2.2.4 there is an appropriate level of monitoring in place for EVs;
- 2.2.5 they have oversight of and monitor compliance by staff and management at their academy.

## 2.3 The Principal/Head of School

The Principal of each academy has responsibility for the development and implementation of EV procedures and processes for all staff and pupils. The Principal will:

- 2.3.1 ensure that EV procedures are being followed and that a review mechanism is in place;
- 2.3.2 appoint a suitably competent EVC;
- 2.3.3 ensure that the EVC is appropriately trained and has sufficient time and authority to fulfil their role;
- 2.3.4 ensure that appropriate insurance arrangements are in place;
- 2.3.5 inform the TGAT CEO or Trust Board of any concerns or issues as early as possible;
- 2.3.6 ensure that there is a process to obtain best value for individual visits;
- 2.3.7 personally approve all **overnight**<sup>1</sup>, **adventurous**<sup>1</sup> and **abroad**<sup>1</sup> EVs.
- 2.3.8 inform the Executive Principal of all overseas visits in advance;
- 2.3.9 ensure that suitable emergency procedures are in place, including procedures to ensure parents<sup>2</sup> are appropriately informed in the event of a serious incident and that TGAT reporting procedures are followed;
- 2.3.10 ensure that critical incident management plans are in place for dealing with an

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<sup>1</sup> Default, overnight, adventurous and abroad are the four visit categories for all TGAT visits and link to the eVisit approval process. See section 3.2

<sup>2</sup> throughout this policy, the term 'parent' shall include all adults with legal parental responsibility for children

emergency;

2.3.11 seek advice from their Pharos EVA (TGAT's EV adviser) when necessary.

## **2.4 Pharos Response Educational Visits Adviser**

Pharos Response Educational Visits Advisory Service (EVAS) exists to support Multi Academy Trusts with their planning and delivery of EVs with a particular focus on safety and compliance. The designated Educational Visits Adviser (EVA) works directly with the CEO, the Trust Board and each academy Principal and EVC to do this. The function of the EVA has been set out in the 'Service Level Agreement' between Pharos and TGAT and includes:

- 2.4.1 providing competent advice and support to key customer contacts at TGAT – usually the EVC(s) and Principal of each academy;
- 2.4.2 reviewing overseas visits once approved by the EVC before passing to the Principal for final approval;
- 2.4.3 delivering training for EVCs and Visit Leaders at establishments across TGAT;
- 2.4.4 desktop and field visit monitoring of selected visits across the academies;
- 2.4.5 producing an annual written report for TGAT for quality assurance purposes and to update the CEO and Trust Board on academy EVs and policy compliance;
- 2.4.6 initial support in developing a robust, Trust-wide EV Policy and updating it on an annual basis, in line with legal requirements and good practice;
- 2.4.7 sharing information about updates to the law and good practice with Principals and EVCs

## **2.5 Educational Visits Coordinator**

The functions of the EVC will be agreed with the Principal at each academy and will include a requirement to:

- 2.5.1 ensure EVs meet TGAT procedural requirements and that the EV Checklist is followed (see EV Checklist on the 'TRUST – Educational Visits' Teams group and in the eVisit document library);
- 2.5.2 advise the academy Principal of any issues concerning the approval of visits;
- 2.5.3 approve all policy-compliant **default**<sup>1</sup> EVs and give initial approval for policy-compliant overnight, adventurous or overseas visits before passing them to the Principal for final approval;
- 2.5.4 pass all overseas visits to the Pharos EVA for review before they are approved by the Principal. This process will be done automatically by the eVisit IT system;
- 2.5.5 assess the competence of prospective leaders and staff in terms of qualifications and/or experience and organise appropriate training and induction;
- 2.5.6 ensure that DBS disclosures required in support of any educational visit are in place as necessary;
- 2.5.7 ensure that emergency arrangements are in place for each visit;
- 2.5.8 keep records of visits, incidents, accidents and near misses on the usual academy system and as a visit note on eVisit, where appropriate;
- 2.5.9 review the use of the eVisit system and monitor practice;

- 2.5.10 report all incidents to the Principal at the earliest opportunity;
- 2.5.11 ensure, where reasonably practicable, that pre-visits have taken place for higher risk visits.

## **2.6 Visit Leaders**

The leader in charge of any academy EV must be competent, confident, and an employee of or otherwise contracted directly by the academy. For further information about the TGAT's guidelines on suitable activity leaders, please see the Supplementary Guidance Notes on the 'TRUST – Educational Visits' Teams group.

Each academy has delegated the following responsibilities to Visit Leaders:

- 2.6.1 to plan the visit carefully and in line with the EV policy, including assessing the risks of activities and recording any significant findings;
- 2.6.2 to fill out eVisit accurately and work within the policy stipulated approval timeline;
- 2.6.3 to work closely with the EVC and follow their guidance;
- 2.6.4 to supervise the visit and ensure planned control measures remain suitable and are followed by themselves and any other visit staff and volunteers;
- 2.6.5 to prepare contingency and emergency plans;
- 2.6.6 to carry out dynamic risk assessments to take into account changing environment, conditions or the group. An ongoing assessment may lead a Visit Leader to turn to a Plan B.

For further information on roles and responsibilities see <https://oeapng.info/guidance-by-role/>

## **2.7 Volunteers**

Any adults on the visit not employed by the academy must be clear about their roles and responsibilities during the visit. Adults not employed by the academy who are acting as supervisors must:

- 2.7.1 be DBS cleared, where reasonably practicable, but if the visit is overnight then this is a mandatory requirement. Otherwise, as a minimum, a 'Volunteer risk assessment' must have been completed and approved by the academy Principal;
- 2.7.2 do what is reasonably practicable to ensure the health and safety of everyone in the group;
- 2.7.3 be clear about the objectives of the visit;
- 2.7.4 attend briefing meetings and participate in all relevant activities;
- 2.7.5 not be left in sole charge of pupils;
- 2.7.6 follow the instructions of the Visit Leader and academy employed staff, and help with control and discipline;
- 2.7.7 speak to the Visit Leader or academy employed staff if concerned about the health or safety of pupils at any time during the visit or if concerned about any aspect of the visit prior to its departure;
- 2.7.8 never be in a situation remote from the support of the leaders or other appropriate members of staff.

### 3 Procedural requirements

#### 3.1 Learning Zones

With the support of Pharos Response, and if appropriate for their site, EVCs from each of the TGAT academies will designate a 'Learning Zone' for their academy. Based on specified geographical, logistical and educational parameters, this zone will encompass learning areas in which staff who have been signed-off as 'competent' can lead visits, during the academy day, without additional consent or risk assessment unless factors change that alter the risk assessment findings. Generic risk assessments and standard operating procedures specifically covering the Learning Zone and activities within it will be used and blanket consent obtained from parents at the beginning of each academic year. The Learning Zone paperwork should then be reviewed annually by the EVC, with approval from the Principal, to ensure it is still fit for purpose.

Only Visit Leaders who have been deemed competent to lead activities in the Learning Zone, who will be recorded on a list kept by the EVC, will be able to take groups to the Learning Zone without additional paperwork. They must, however, inform their line manager before going and conform to the agreed operating procedures which each participating academy will set. All Learning Zone risk assessments, consent letters, standard operating procedures, and other 'set-up' paperwork should be sent to the EVA for review before being approved by the Principal prior to use.

A copy of the briefing document outlining suggested standard operating procedures for the Learning Zone can be found on the 'TRUST – Educational Visits' Teams group. However, the operation of each Learning Zone will be subject to an establishment-specific procedure.

#### 3.2 Visit categories

TGAT has identified four categories of EV beyond the Learning Zone, each requiring escalating levels of risk management and academy level sign-off in order to proceed. The table below shows how the visits are programmed within eVisit:

	<b>Default</b>	<b>Overnight</b>	<b>Adventurous</b>	<b>Overseas</b>
<b>Description</b>	Takes place in UK and does <b>not</b> involve an adventurous activity or overnight stay.	Takes place in UK with an overnight stay/s but <b>not</b> an adventurous activity.	Takes place in UK with adventurous activity, <b>regardless</b> of whether overnight stay or not.	Takes place abroad, <b>regardless</b> of whether or not it involves an adventurous activity
<b>Planning Process</b>	Visit Leader completes and adheres to the EV Checklist and submits the visit on eVisit within the approval timelines (see below)			
<b>Approval</b>	Academy EVC will be authorised to approve trip. Can contact Pharos Response for advice, if required.	Academy EVC will give initial approval then to the Principal for sign-off. Can contact Pharos Response for advice.	Academy EVC will give initial approval then to the Principal for sign-off. Can contact Pharos Response for advice.	EVC gives initial approval and passes to Pharos Response for review <b>before</b> going to Principal for approval

##### Default visits

Where a visit involves neither an overnight stay, an adventurous activity or is overseas, it is classed as a default visit. These visits, if compliant with the policy, can be approved solely by the EVC who may contact their Principal or Pharos Response at any point for further advice if required.

### Overnight Visits

Where a visit takes place in the UK and involves an overnight stay, additional measures should be put in place to protect and safeguard pupils. These should be in line with the TGAT Safeguarding Children Policy and OEAP national guidance. Overnight visits will need to be approved by the Principal, but the academy EVC may contact Pharos Response at any point for further advice if required.

### Adventurous activities

Where an EV takes place in the UK and involves an adventurous activity, whether or not it also includes an overnight stay, the visit should be recorded as 'Adventurous Activity' in the eVisit system and approval will need to come from the Principal. The academy EVC may contact the Pharos Response EVA at any point for further advice, if required.

Where practicable, any activities of an adventurous kind should be arranged through a specialist provider. However, qualified and experienced staff may organise and run visits with the approval of the Principal.

When planning an adventurous activity, the Visit Leader should familiarise themselves with [The Adventure Activities Licensing Regulations 2004](#). The Visit Leader must ensure that any activities that are licensable under these regulations are covered by an AALA licence. These activities include caving, climbing (except on artificial walls), trekking (including pony trekking, off-road cycling, off-piste skiing) and watersports (on certain bodies of water including the sea, rivers and "turbulent inland waters").

Many activities are not licensable by AALA (e.g. ropes courses, indoor climbing, archery etc) and can be covered by other accreditation marks such as [Adventuremark](#) and the [Learning Outside the Classroom \(LOtC\) quality badge](#).

The Adventuremark and LOtC quality badge, unlike the AALA licence, are non-statutory so if a centre is offering non-AALA-licensable activities and does not hold an Adventuremark or LOtC badge, it does not mean they cannot be used, only that more checks and measures should be carried out on the provider by the Visit Leader. A '[Provider Statement](#)' must also be completed by the centre and uploaded into the Document Library on eVisit. Refer to Section 3.9 - Using External Providers

Further information on activity licensing and 'badging' schemes is available on [the Outdoor Education Advisor Panel National Guidance](#).

### Overseas Visits

The Trust encourages overseas visits. A reminder about managing these can be found in the Guidance Notes on the 'TRUST – Educational Visits' Teams group. In the event of joint visits between more than one Tudor Grange academy, joint planning meetings and briefings must take place, but only one visit needs to be recorded on eVisit, set up by the Visit Leader from the lead academy. If academies prefer to submit a visit each this is acceptable but Pharos should be made aware of this, for ease of reporting. A final planning meeting should be held with at least one Principal in attendance.

## **3.3 Educational Visit Checklist**

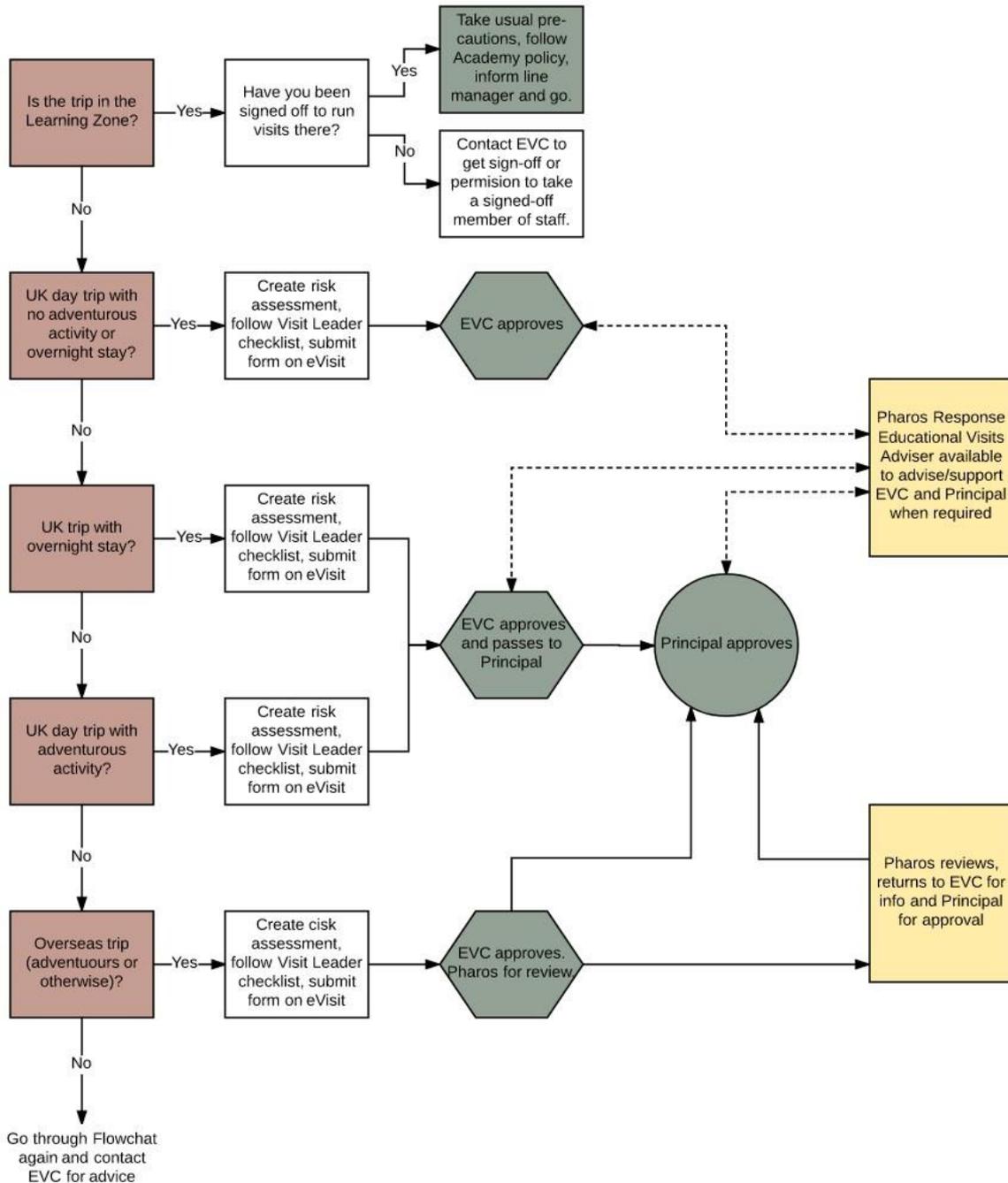
The EV Checklist outlines the steps for a Visit Leader to work through when planning an EV. This checklist represents a cornerstone of compliance and should be completed and attached

to every visit on eVisit. A copy of the EV Checklist can be downloaded from the eVisit Document Library and can also be found on the 'TRUST – Educational Visits' Teams group.

### 3.4 Approvals process

The flow chart below should be used in conjunction with the EV checklist on the 'TRUST – Educational Visits' Teams group to ensure the correct approvals process is adhered to:

**Before you start: is this visit happening on the school site?**  
If so, refer to your Academy's on-site policy instead



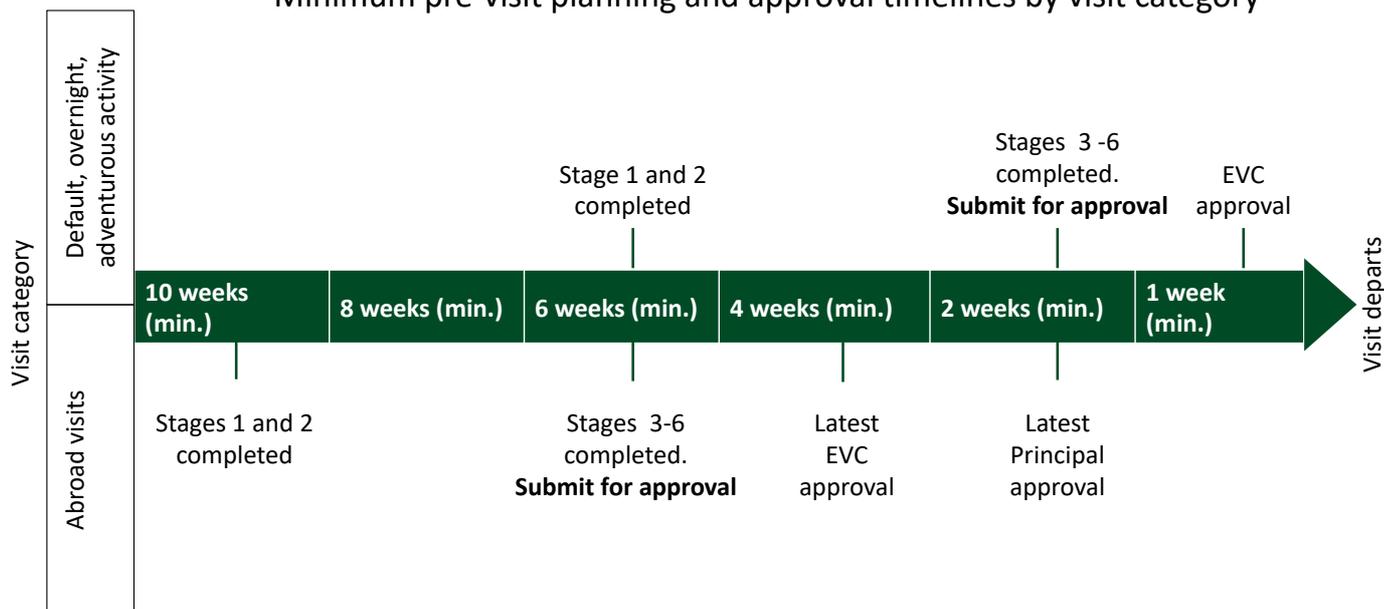
### 3.5 Approvals timeline

In order for EVCs and Principals to have time to appropriately check, return for more

information and approve EVs, a structured approvals timeline has been put in place, a diagram of which can be found below. It is the responsibility of the Visit Leader to ensure that they meet the timelines in order to allow the due diligence process to be completed properly by the EVC, Principal and, where required, the EVA.

A record of staff members who repeatedly fail to submit their visits in enough time to gain appropriate approval will be kept by the EVA in order for follow-up to be carried-out by the academy SLT where required.

Minimum pre-visit planning and approval timelines by visit category



The stages referred to in the above diagram relate to the stages outlined on the EV Checklist. This Checklist must be completed for every visit and uploaded onto eVisit so it is clear to the EVC what has been done and in order for a clear audit trail to be maintained.

Overseas visits can vary greatly in complexity and risk. The above approval timeline for overseas visits is therefore a guideline. EVCs should make the EVA aware in advance of upcoming overseas visits so an appropriate, specific timeline for that visit’s approval can be agreed between them.

### 3.6 Visit emergency pack

Both the Visit Leader and deputy (or another designated member of staff if there is no ‘official’ deputy), should carry an emergency pack at all times. A pack must also be left with the visit emergency SLT contact. Emergency packs should contain, as a minimum, a list of pupil/staff emergency contact details plus ages and a sufficient medical history of all pupils, including any medication requirements and any individual care plans or risk assessments. Care must be taken by staff to put measures in place to secure this data as it will be sensitive. Any loss of data must be reported to the Principal asap and within 24hrs. The information in the emergency packs will also be available on eVisit so the EVC and Principal can access it there.

### 3.7 Duty of care

The duty of care expected of TGAT Visit Leaders is that of a reasonable, prudent and careful teaching professional applying his or her mind to the situation. The duty is continuous during the whole period of the visit and cannot be delegated to anyone else. However, the Visit Leader should arrange a duty roster to ensure members of staff have adequate rest. It is essential that everyone involved in the visit understands the supervision arrangements and expectations.

For information on direct, indirect and remote supervision refer to [National Guidance document 4.2](#)

### 3.8 Supervision ratios

From September 2021 new statutory guidance is in place that all ‘early years’ (aged 0 – 5 years) providers must adhere to. This will include reception classes in TGAT primary academies. Visit Leaders, EVCs and Principals for primary schools that cover this age group must familiarise themselves with the [Statutory framework for the early years foundation stage](#) and operate within it at all times. This framework outlines supervision and other expectations for the classroom only. The table below sets out TGAT’s supervision ratios for ‘early years’ pupils on EVs.

Supervision ratios are determined as part of the planning and approval process. The appropriate ratio for any activity will be informed by the risk assessment where there are no specific external or stakeholder guidelines, such as National Governing Bodies, that dictate instructor : pupil ratios. The decision should take into account:

- pupil gender, age (including developmental age), ability, competence and behaviour;
- general and specific supervision competencies;
- special educational needs and disabilities (which should trigger a higher ratio or individual care plan(s));
- duration and nature of the activity, including any journey required to get there/back;
- location and environment of where the activity will take place, including accommodation and requirements of the venue.

Unless a trip is operating under National Governing Body ratios (as will be the case for many adventurous activities), there are **no** clear, legal requirements for adult : pupil supervision ratios on educational visits. However, taking into account the OEAP National Guidance and other bodies of work, this Policy stipulates the following ratios should be adhered to unless the Principal gives case-specific consent, which should be recorded in writing, to operate outside of them:

	Learning Zone	Default trip	Overnight	Adventurous Activity	Overseas
<b>Primary</b>					
Nursery	1:3	1:3	-	-	-
Reception	1:6	1:6	-	-	-
Yrs 1 – 3	1:6	1:6	1:6	1:6	1:6
Yrs 4 - 6	1:10	1:10	1:10	1:10	1:6
<b>Secondary</b>	1:25*	1:15	1:15	1:15	1:10

- Notes:** - these are minimum staff to pupil ratio guidelines
- NGB ratios **must** be observed if school staff are delivering adventurous activities
  - for SEND pupils, ratios might need to be tighter
  - at least two adults, each of a different gender should accompany overnight and overseas visits (*where this is not reasonably practicable, staff must still be able to access a member of the Safeguarding team through the on-call system*)
  - at least two adults must accompany adventurous visits

\* These are minimum staff : pupil ratios but should be informed by each academy's generic risk assessment. As the Learning Zone is a new concept, it is recommended that, where possible, at least two adults accompany Learning Zone activities, at least one of whom should be a teacher.

These are merely minimum staff : pupil policy ratios. The actual supervision ratios must be informed by the needs of the group members and the complexity of the activity and they must be agreed by the EVC. A Learning Zone visit is supposed to be one which can happen 'at the drop of a hat', therefore, in principle, a class teacher could take their entire class out into the local area as long as they and the EVC are happy that the pupils are sensible and mature enough to manage with such supervision, and if the Learning Zone controls are applied.

In each academy, the suggested ratio can be amended with the permission of the Principal, EVC and Visit Leader after the risk assessment has been submitted and before the final planning takes place. Advice may be sought from the LGB or from the Pharos Response EVA if needed. Further guidelines can be sought from:

- [RoSPA](#) (Royal Society for the Prevention of Accidents)
- The Department for Education
- OEAP (Outdoor Education Advisers Panel <https://oeapng.info/>).

TGAT supports exploratory/reconnaissance visits by any member of staff who is to lead a group abroad, on a residential visit, or in a location that is not familiar to them. These visits will enable Leaders to gain first-hand knowledge of the area and facilities which will inform the risk assessment and pre-planning.

Any costs incurred will be included in the total cost of the visit, although some contractors or providers may offer a pre-visit for the Visit Leader free of charge.

Where a pre-visit is not possible, the Principal, advised by the EVC (and the EVA for overseas visits), will determine whether the subsequent risk management plan is acceptable prior to authorisation of the visit. Whether a pre-visit has been carried out or not, the Visit Leader should make a preliminary check of the venue upon arrival, noting any hazards or safety features.

### 3.9 Using external providers

If using the facilities of a contractor, e.g. a tour operator, the Visit Leader should arrange a meeting with the local representative or manager in order that both parties can be kept fully informed and any concerns can be raised. Any points discussed should be noted in writing.

External providers contracted to run EVs should, wherever possible, hold the LOTC 'Quality Badge' (see drop down menu on eVisit.). Where an un-badged provider is selected, the Visit Leader must undertake appropriate risk assessment (as with any EV), and check what other accreditation the provider holds. In this case an OEAP National Guidance Provider Statement, which can be downloaded from the eVisit document library or the 'TRUST – Educational

Visits' Teams group, should be sent to the provider for completion, then sent to the EVC. The EVC should check they are satisfied with the provider's answers then upload the completed Provider Statement to the document library in eVisit. If one TGAT academy has received a completed Provider Checklist from a provider, any academy can use that same provider without requesting another Checklist from them. Provider Checklists should be updated annually.

An exception to the requirement to attach a Provider Statement to a non-LOtC badged provider, is if the venue being visited is a public access building. In this case, as long as the visit does not include areas or activities that members of the public would not visit or complete, a Provider Statement does not need to be completed. Visit Leaders will be guided through this automatically by eVisit.

In all cases the Visit Leader must write their own risk assessment to include any likely risks posed by or to the members of the group.

### **3.10 Transport providers**

Where coaches are being hired to provide the transport for an Educational Visit, due diligence must be carried out on the coach company prior to the visit. A Transport Checklist (which can be found in the documents library on eVisit, as well as the 'TRUST – Educational Visits' Teams group ) should be sent to and completed by the coach company, checked by the EVC and uploaded to the eVisit Document Library. If one TGAT academy has received a completed Transport Checklist from a coach company, any academy can use that same company without requesting another Checklist from them. Transport Checklists should be updated annually.

### **3.11 Parental consent**

It is TGAT's policy, as informed by The Department for Education, that parents should be made aware of ALL EVs that happen outside the normal start or finish of the academy day (including sports fixtures and local visits as part of the curriculum), or where an academy's duty of care will be exercised by contractor's staff on behalf of the academy, (noting that TGAT staff can never be fully absolved of their duty of care). For these activities, consent **must** be obtained in the form of a written consent letter. Should a consent form not be submitted in time, verbal consent may be gained from a parent/guardian. This must be recorded on eVisit and the EVC/pupil services must be informed prior to departure.

If a child in the group is subject to a care order, the relevant Social Services Department (SSD) should consent to any activity for which parental consent is advised. The SSD should be informed of any other 'learning outside the classroom' activity. The academy should also ensure that foster carers are aware of this so that they can take the necessary action.

- Consent is not required for educational visits that take place during normal academy hours as part of the national curriculum. However, it is good practice to inform parents that such visits are taking place.
- For activities taking place within the Learning Zone, or as a normal part of the curriculum within the academy day, additional parental consent need not be obtained. However, general parental consent needs to have been given at the beginning of the academic year, with parents being clearly made aware of what they are consenting to.
- If agreement cannot be reached with any parent who refuses consent, the pupil should be omitted from the activity and remain in school.
- Parents who object to their child participating in a low-risk activity must be referred to the

College Leader or appropriate senior leader (see also charging for educational visits, Section 8.1)

### **3.12 Consent for medical treatment**

Some Educational Visits may require consent from parents for emergency medical treatment (including, for example, anaesthesia or blood transfusions), where such treatment is considered necessary by the medical authorities. Parental consent will be sought for such treatment by way of a letter. This letter may be sent to parents at the beginning of the academic year or in advance of specific Educational Visits, according to each academy's procedure. Where parents refuse to consent to emergency medical treatment, either on religious or other grounds, advice will be sought from the TGAT public liability insurer and/or legal adviser to determine whether their child is still able to take part.

If abroad, a doctor may be reluctant to treat one of the group participants if the Visit Leader does not have documented consent, therefore it is good practice for the Visit Leader to have ready access to a record of parental consent on such Educational Visits.

### **3.13 First aid**

The Health and Safety (first aid) Regulations 1981 apply to TGAT academies and make it clear that "adequate" and "appropriate" first aid equipment, facilities and personnel must be in place. Other than for 'early years' providers, where separate legislation is in place ([Statutory framework for the early years foundation stage](#)), there is no specific guidance outlining the numbers of first aiders that must be present in an academy or accompany an educational visit. Visit Leaders must therefore follow any guidelines contained within the TGAT Health and Safety Policy, when determining the first aid arrangements for an EV.

Minimum first aid provision for low-risk settings should comprise a suitably stocked first-aid box and a person appointed to be in charge of first aid arrangements. They may not necessarily be first aid qualified but will have a reasonable, working knowledge of first aid and be responsible for calling an ambulance and containing the situation, preventing further injury to pupils and staff.

For primary school EVs or for complex activities such as visits abroad or adventurous activities where emergency ambulance access may be delayed, at least one of the group's supervisors must be a suitably trained first aider. For early years providers, at least one member of staff with a pediatric first aid qualification must attend each EV.

### **3.14 Safeguarding**

Child safeguarding measures must be considered at an early stage of the planning and, ideally through pre-visits, appropriate venues should be chosen that allow staff to effectively manage the safeguarding of the students. In line with the TGAT Safeguarding Policy, every member of staff or volunteer accompanying an EV is advised to adopt the attitude of 'it could happen here' where safeguarding is concerned. The Safeguarding Policy underpins all operational practice at TGAT academies, including that outlined in this policy, and it should always be adhered to. If the Safeguarding Policy is updated, its contents override the contents of this policy, in relation to Safeguarding. A key summary of safeguarding measures for staff to adhere to on EVs can be found below.

All supervisory staff or adults who are employed to instruct students must be DBS checked before being allowed to supervise a group. Where reasonably practicable, or if the visit is overnight, all volunteers must also be DBS checked. Otherwise, as a minimum, they must

have a 'Volunteer risk assessment' completed and approved by the Principal and must operate within the other stipulations set out within section 2.7, including not being left in sole charge of students.

Visit staff should give careful consideration to sleeping arrangements on EVs and allocate staff and student rooms with child protection as the main focus, taking into account any additional needs. The relationship between staff and students on EVs, particularly on residential visits, is often less formal than in the classroom, which can be of enormous benefit, but can also introduce higher risks. Staff should be acutely aware of the professional boundaries within which they need to operate, and be at pains to maintain professional standards at all times, including in how they speak, how they act, the conversations they allow to take place between students in their presence etc. If students need first aid treatment or emotional support during a visit, particularly overnight, particular care should be taken by staff to provide this in a way in which professional boundaries are maintained, through visible, transparent and appropriate actions.

If staff become aware of a safeguarding incident, disclosure or concern whilst on an EV, they must follow the Safeguarding Policy and report it to their academy's DSL. If the disclosure/incident occurs out of hours, there should be adequate cover in place for this role – e.g. a member of the SLT who can manage or escalate the incident/disclosure or, for higher risk visits, a member of the Safeguarding team on call. If the student in question is at **immediate** risk of harm, a referral should be made to social services or the police immediately. If this is done by someone other than the DSL, e.g. for reasons of urgency, the DSL must be notified, as soon as possible, that a referral has been made.

The Safeguarding Policy must be referred to and followed, and incidents, concerns or disclosures must be recorded, maintaining confidentiality whilst prioritising the safety of the student(s) concerned.

When using external providers, clear handovers between provider and TGA staff should take place so it is evident to all who is responsible for the students at any point. Where reasonably practicable, visit staff should not leave students in the care of provider staff unobserved and monitored by TGA staff (unless in an emergency when that is necessary to preserve life or prevent an injured student's condition from worsening). A Provider's safeguarding arrangements should be reviewed prior to the visit and questions raised, if necessary, by the Visit Leader. In the event of a potential safeguarding breach by provider staff (and after the immediate safeguarding of students has been secured), this should be raised immediately by the TGA staff on site with the provider's management. Thereafter the liaison should be made between the academy DSL and the Provider's own DSL.

Further guidance can be found in the TGAT Safeguarding Children Policy and the Keeping Children safe in Education statutory guidance from the Department for Education.

#### **4 Risk management and risk benefit analysis**

TGAT supports the principle of risk benefit assessment. The aim of sensible risk management for an EV is not to make the activity as safe as possible but as safe as it needs to be to maximise the learning outcomes whilst keeping an acceptable level of residual risk.

Visit Leaders who are in doubt about the balance of benefit and risk should consult the EVC. The EVC is empowered to make decisions on the balance of benefit and risk. Where the EVC is unsure he/she can consult the EVA at Pharos Response to ask for advice.

#### **4.1 Risk assessments**

In order for an EV to be approved to go ahead, a written, suitable and sufficient risk assessment must be submitted by the Visit Leader. Example risk assessments, created by Pharos Response, can be made available, on request, to use as starting points. It is **imperative**, however, that the Visit Leader takes ownership of any generic risk assessment by making it relevant to their particular EV. This means they should take into account not only the activities being undertaken, but any specific needs of individuals on the trip.

Template blank risk assessments can be downloaded from eVisit and the 'TRUST – Educational Visits' Teams group, and it is requested that the Visit Leaders use this template so that risk assessments are standardised across TGAT. In order to be a useful, compliant document, the risk assessment should contain evidence of the knowledge of possible risks and ways to manage, avoid or mitigate them.

#### **4.2 Risk assessing pupils with SEN, disability or medical needs**

Every effort should be made to include pupils with particular additional needs where possible, in accordance with TGAT's SEND Policy and, if applicable, an individual academy's SEND Policy. Risk assessments should consider:

- any additional aids or equipment that are needed;
- any additional staff requirements – e.g. higher staff : pupil ratios (see TGAT and academy SEND policies);
- parking/access requirements for pupils with blue badge mobility issues (consider bringing the blue badge and letting venues know in advance, which may allow parking closer to the entrance);
- PEEPS (Personal Emergency Evacuation Plans) and evacuation arrangements.

#### **4.3 Dynamic risk assessments**

Dynamic risk assessments should be carried out by EV staff continuously. These will not usually be written at the time, but any significant changes made to the risk assessment as a whole or the control measures, or any additional hazards seen or anticipated should be recorded, e.g. they can be handwritten onto the risk assessment and documented in the evaluation form. This should then be made available by the EVC for the benefit of future visit staff.

#### **4.4 Involving pupils in the organisation of EVs**

It is TGAT's view that pupils are likely to manage risks better if they are involved in the planning rather than just being told what to do. Pupils should be involved in visit planning where appropriate and be trained to be 'risk aware' rather than 'risk averse'.

#### **4.5 Coronavirus and other localised or seasonal risks**

The covid-19 pandemic caused and continues to cause a huge amount of disruption to schools, businesses, families and individuals. For as long as the virus continues to be a problem, Visit Leaders must consider it, and any restrictions, guidance and associated risks surrounding it when planning their EVs. Should any other major infectious illnesses cause similar disruption before the revision date of this policy, they should be considered in a similar way.

When starting to plan an EV, bearing Covid 19 in mind, a Visit Leader must:

- check the UK government's guidance and ensure that the EV is planned in line with this;
- be aware that the UK government's guidance may change at very short notice thus keep themselves abreast of any such changes;
- as with any EV, consider the risk : benefit analysis;
- be aware that guidance can differ in devolved areas of the UK so restrictions and rules in Wales are likely to be different to restrictions and rules in England;
- if planning an overseas EV, consider not just the restrictions for the countries being visited but also any countries being transferred through as well as restrictions in place for returning to the UK. Note, these may in turn be different for different passport holders and ages. Restrictions may relate to vaccine status, testing before departure and for re-entry to the UK and passenger locator forms. The [FCDO website](#) provides the definitive guidance regarding travel regulations;
- refer to the Pharos Response 'Covid-19 risk assessment considerations for educational visits' for further guidance about how to manage EVs in a way that addresses the risks presented by the virus;
- ensure that TGAT or academy insurance is in place and be aware of any covid-related inclusions, exceptions or limitations;
- ensure that a contingency plan is in place to consider cancellations, staff illness/self-isolation and potential virus outbreaks.

EVCs should check that Visit Leaders have planned visits appropriately, with covid-19 in mind and Visit staff should be prepared to be flexible.

## **5 Inclusion**

TGAT supports the inclusion of all pupils on EVs wherever possible. In accordance with the Equality Act 2010, it is against the law to discriminate against someone based on any of the protected characteristics, thus Visit Leaders must make reasonable adjustments, if required, to include would-be participants who have a disability or present with other protected characteristics. The risk assessment can include such enabling measures.

Each academy must ensure that practical measures are in place to include pupils with special educational needs or medical conditions where reasonable and practical. They should have, where possible, the same learning opportunities as the others in the group. The SENCO should determine what ratio of supervision the pupil will need for the visit and liaise with the EVC.

Refer to general academy policies and OEAP National Guidance for further information.

## **6 Behaviour**

### **6.1 Pupil Code of Conduct**

TGAT's 'Behaviour and Discipline Policy' must be complied with by pupils and staff. If an individual academy has its own 'behaviour and discipline' policy, this must be adhered to. If either policy includes a generic or EV-specific, written Code of Conduct, the Visit Leader should ensure that parents and pupils have signed it.

- TGAT does not allow pupils to consume any alcohol on EVs. The only exception to this may be a Sixth Form visit where alcohol may be allowed with meals, in accordance with UK and local law, if overseas. This may only happen with the supervision of staff and parental agreement in advance. The Visit Leader will decide on the appropriate arrangements for the visit they are coordinating in liaison with their Principal.

- TGAT does not allow smoking of any tobacco products on EVs, including e-cigarettes.
- The possession or use of any drug, other than legal over-the-counter medicines or medically prescribed drugs (pre-advice of which should be given to the staff in charge of the activity), is totally banned and each academy will take a most severe attitude to any departure from this rule.
- TGAT does not allow pupils to participate in sexual activities whilst on EVs. Staff should be aware of any existing or developing pupil relationships and ensure that pupils conduct themselves in accordance with this rule.

Any breach of the above guidelines will be treated with the utmost seriousness and may result in any or all of the following sanctions:

- the pupil being sent home immediately at their parent's expense;
- the pupil being banned from all future trips;
- an exclusion.

## **6.2 Staff Code of Conduct**

TGAT and each academy has a formal 'Adult Code of Conduct' which must be complied with.

Every academy expects that all adults acting *in loco parentis* on any academy trip will be mindful of responsible and proper behaviour, so that they are able to exercise their professional judgement at all times.

Members of staff may wish to consume alcohol during an off-site visit, provided this is within the UK drink-driving limit. Drinking alcohol above this amount is unacceptable on an EV and may lead to disciplinary proceedings. At all times, there must be at least one member of staff who is not drinking any alcohol. However, if it is the decision of the Visit Leader, the Principal, that a total ban on alcohol is appropriate then this will be the case.

Although staff have a 24-hour responsibility for pupil welfare on a residential visit, they cannot all be on duty for 24 hours. The duty roster which the Visit Leader creates must be adhered to. All staff must ensure that they are on duty at the times set down and have the necessary information about the group and the events at that time, which should include emergency contact and medical information. This person cannot drink alcohol during that duty period.

The Visit Leader must ensure that all staff are reminded of these expectations whilst on a visit.

## **7 Monitoring and Compliance**

### **7.1 Quality assurance and oversight**

As part of Pharos Response's agreement with TGAT, a certain amount of Quality Assurance (QA) is done by Pharos. This does not negate the need for EVCs and Principals to have oversight over their own academy's EVs, but it should provide some support to TGAT in ensuring that visits are run in line with policy, with relevant staff being notified when they're not.

Pharos will:

- inform all EVCs on the correct and compliant use of the eVisit system;
- conduct weekly eVisit checks for each establishment, sending reminders to EVCs about upcoming visits that have not yet been approved;
- send management information reports to all academy EVCs and Principals, as well as the

CEO and other key Trust Board members on each academy's visit data. This will include the number of visits being planned and undertaken for each period as well as highlighting any breaches in policy regarding visits not being approved or being approved too late.

- produce an annual written report, followed by a presentation to the Trust Board, outlining key successes for each academy and any policy breaches or other causes of concern;
- conduct Desktop Reviews of EVs on eVisit, with written reports sent to the EVC and Principal for that academy, outlining good and poor practice;
- conduct Field reviews of EVs in-person, with a written report sent to the EVC and Principal, highlighting any good and poor practice seen;
- develop bespoke Visit Leader and EVC Training each year to address any specific issues that have arisen through the above, in order to assist with continuous professional development.

## **7.2 Legal compliance and raising concerns**

All members of staff should be concerned about any serious and immediate risk, and also about any systemic shortcomings. If concerns cannot be settled amongst the staff leading the activity, all staff will be expected to stop the activity and refer the matter to the emergency SLT contact.

TGAT recognises the right of members of staff to refuse to participate in an activity which they consider unsafe. In such cases an alternative arrangement can be made with consent from the SLT.

## **8 Finance and insurance**

Financial planning must be approved at the start of the planning process and a completed 'EV Finance Form' (found in the eVisit Document Library and on the 'TRUST – Educational Visits' Teams group) uploaded to the eVisit system by the Visit Leader. The EVC must check that the form is there and has been completed and signed-off before approving a visit. An EV Finance Form must be completed and attached even if the Visit Leader believes no charge is associated with the visit.

### **8.1 Charging for visits**

Every Visit Leader must be familiar with and comply with the TGAT Charging and Remissions Policy, which among other things outlines what academies can and cannot charge for, by law.

### **8.2 Costing of visits**

The Visit Leader is responsible for ensuring that the full costs involved in an EV are covered, either by parental contribution or by pre-arranged subvention from academy funds.

The following main costs need to be considered but others may apply, depending on the nature of the journey:

- any cost of cover for absent staff;
- accommodation;
- food;
- travel/transfers;
- excursions;
- administration costs in organising the journey;
- insurance;
- contingencies.

For UK EVs, Visit Leaders should add on a 5% contingency fund to the charge made to the

pupils. For overseas trips, this should be a 10% contingency fund.

### **8.3 Accounts**

A record of receipts and payments should be kept and supported wherever possible by documentary evidence.

The records should be available at any time for examination by the Principal or the Chief Finance Officer and will be reviewed annually by the TGAT auditors. They should be retained at the academy for a minimum period of six years.

For all practical purposes, each academy finance office will act as the bank for all EVs. All income relating to the EV should be passed to the academy finance office and all payments should be requested from them except in circumstances where an alternative system, e.g. of petty cash, has been authorised for the visit by the academy's Finance Manager. In no circumstances should the personal accounts of members of staff be used for any academy activity.

Where a pupil withdraws from an EV, or is banned from an EV because of bad behaviour, after arrangements have been made, sufficient funds should be withheld from the contributions already made by that pupil's parents in order to cover any irrecoverable costs incurred on the pupil's behalf.

Parents should be informed in the consent letter for the EV of the relevant visit budget, the finance procedures and rules. They will also be given the opportunity to opt out of receiving back any residual funds above £5 per pupil on the EV's return. If leftover money falls below £5 per pupil or parents opt out of receiving their allocation, it will be retained by the academy as contingency for future EVs.

### **8.4 Insurance**

Each academy will ensure that appropriate insurance is always in place to cover employees (Employer Liability Insurance) and the academy's liability to the public (Public Liability Insurance), including pupils.

TGAT has Risk Protection Arrangements (RPA) cover through the Department for Education which includes overseas travel (including winter sports). However, it is the duty of the Visit Leader, followed by the EVC and Principal to ensure that the insurance policy will cover all activities being undertaken and to arrange additional insurance if it does not.

It is possible that some adventurous activities are not covered by TGAT's RPA, in which case, additional cover will be required. Tour operators may include additional travel insurance as part of the package they offer, but it is generally expected that the RPA will be used, unless otherwise agreed by the Principal. The responsibility for ensuring that insurance is suitable lies with each academy and note should be taken of specific exclusions such as for example, some snow sports, driving motor vehicles, high altitude, sub aqua, and individuals' pre-existing medical conditions. The academy will also determine whether additional insurance needs to be taken out by parents for their children and to inform the parents of this necessity and how it is to be arranged.

For more complex EVs the academy will tell parents what insurance arrangements are in place and ask parents to accept the insurance arrangements through the consent form. Some parents may cancel their child's place on an extra-curricular activity (one that takes place outside the academy day or term). If the place cannot be refilled, and the cancellation is covered by the insurance policy, the academy should forward the cancellation to the insurer and operator as soon as possible to help to mitigate cancellation charges.

## **9 Data protection and GDPR**

All members of staff should be aware of and compliant with TGAT's GDPR policy and should manage visit data in accordance with TGAT's guidelines. This may include Visit Leaders ensuring that other providers being used, e.g. activity providers, flight carriers, venues etc are collecting, storing and using personal data, when required, appropriately.

The Principal remains the Data Controller for any visit-related data and will ensure that any data-processing third parties are assessed and approved, and that consent is correctly gained.

## **10 Emergency procedures and incident reporting**

Pharos Response has helped TGAT put a critical incident plan in place to deal with emergencies on EVs. TGAT will adhere to its policy and guidance documents on the reporting of accidents and incidents which are informed by the Health and Safety Executive.

It is good practice for Visit Leaders to consider, in advance, an 'emergency plan' for their visit and Pharos encourages this practice. As a minimum, the following elements should be in place:

- every visit on eVisit should include the contact details of the designated member of SLT on call for the duration of the visit;
- this 'home contact' should have access to eVisit, to the visit details, and to senior colleagues' contact details;
- the Visit Leader should carry and put on eVisit next of kin emergency contact details for every student and member of staff on the visit. Where a visit takes place entirely within school hours, emergency next-of-kin details may not always need to be carried, but the Visit Leader must ensure that they will be able to access these through a point of contact at the academy;
- in the event of a critical incident or emergency taking place on an EV, the academy communications tree needs to be activated. The Principal should be informed immediately, through the 'home contact', or directly by the Visit Leader, keeping the home contact informed;
- the Principal should then decide if the critical incident plan needs to be activated and a team of suitable senior staff configured to respond.

Pharos Response have in place a 24/7 emergency response service as part of their service agreement with TGAT. Through this service they provide telephone-based critical incident support, which includes: crisis, PR, media and social media consultancy and advice; an overflow call centre in case of a high volume of calls from parents/interested people; a trauma counselling service to staff and pupils and a post-incident investigation and review service to academies. Pharos can also deploy a competent consultant to the location of a critical incident within 24 hours of the incident occurring.

The critical incident team at Pharos Response can be reached on: 01183 800999.