

Brook Learning Trust

Educational Visits Policy



Introduction

At Brook Learning Trust we bring together our unique academies in our belief in the power of education to change lives and communities. It is our steadfast purpose to challenge and defy the barriers that constrain the educational progress of any child. We set high aims for aspiration and secure collective responsibility for all our children's achievements. Our work is underpinned by the values of Integrity, Respect, Courage, Optimism, Excellence and Accountability.

Scope

This policy covers all educational visits that occur outside academy premises. This ranges from walks around the locality to residential visits of several days' duration. It includes also outdoor and adventurous activities.

Aims and Objectives for Educational Visits

Our fundamental aim is to ensure students at our academies experience a wide range of activities which enhance their learning experience. Educational visits are an integral part of the curriculum, enabling students to have first-hand experience of a wide range of topics and activities. Educational visits also offer opportunities for developing good social skills, and help children to understand and manage the risks that are a normal part of life. It is our aim that all students are enabled to participate in educational visits regardless of means. The health and safety of pupils in our academies is paramount, and this includes activities which take place on or off site. All visits are conducted under a common sense approach to health and safety and risk management, following the procedures set out in this document.

Roles and Responsibilities:

Principal

The Principal must appoint an Educational Visits Coordinator (EVC) who has oversight of the visits being undertaken. The Principal must be satisfied that visits are properly planned, risk managed, and led by a competent Lead Teacher, before giving approval.

Educational Visits Co-ordinators

The Educational Visits Co-ordinator (EVC) is responsible for the planning and oversight of all visits, including:

- Ensuring that approval is given for visits, including approval from the Chair of Academy Council for residential visits
- Ensuring that all providers of off-site visits are properly accredited or verified and insured
- Ensuring that all visits are led by a competent Lead Teacher
- Ensuring that all staff are aware of their responsibilities under this and other relevant policies
- Ensuring that the emergency procedures are in place in case of a major incident, and that staff are aware of these procedures

Lead Teacher

Each visit will have a Lead Teacher responsible for the organisation and operation of the visit. Lead Teachers will work closely with the EVC and Head of Academy Administration to plan the annual calendar of educational visits.

Academy Finance Assistant

The Academy Finance Assistant is responsible for checking the budget for the visit and managing the flow of incoming and outgoing payments and collating all of the trip documentation for audit purposes.

All visits information must be made available to auditors for the purposes of keeping trustees informed about financial compliance and effective risk management of educational visits.

Chair of Academy Council

All residential trips must be authorised by the Chair of Academy Council.

Annual Planning

The **EVC** must maintain an annual calendar of educational visits so that these can be properly planned, assessed for risk, authorised and financed well in advance of the visit taking place. The **EVC** must communicate the annual calendar of visits to the **Finance Assistant** so that the finance system can be updated.

Planning a Visit

The **Lead Teacher** must prepare the following documentation for their trip well in advance of the visit taking place.

- Risk assessment (template in appendix A, guidance in appendix B). Activities which run infrequently and beyond a normal school day, will require a full written risk assessment. A written risk assessment does not need to be completed each time an activity is undertaken which is part of the normal school day, such as taking students to a local swimming pool, park or place of worship. Routine activities such as these can be covered by general guidance on health and safety, or the academy's standard risk assessment for activities of a similar nature.
- Residential Visit Activity Schedule (appendix C), if applicable. This document will outline the activities students will be undertaking during a residential trip, thereby informing the risk assessment process, and also ensuring that appropriate supervision is in place for the full duration of the visit.
- Educational Visit Confirmation Form (appendix D), which must be reviewed and approved by the **Finance Assistant** before submission to **EVC**. **Lead Teachers** must ensure all information requested on the form is completed.
- Letter to parents (template in appendix E)

General Guidance for Planning Visits and Assessing Risks

In any communications regarding visits, parents should be made fully aware of the nature of the visit from the start (and before they 'sign up'), and understand the potential risks that may be offered by the nature of the venue, location or environment in the city or country to be visited. In the case of overseas trips, it may be helpful to direct parents to the government's [Travel Advice](#) website.

The [OEAP National Guidance](#) website is a useful source of information and advice when planning a visit and conducting a risk assessment. The website provides comprehensive checklists of issues to be considered – choosing an appropriate Provider or, (if not using a Provider), planning self-led visits, accommodation security, travel arrangements in country, local and cultural considerations, emergency plans, health care actions, insurance, etc.

Ensure that all staff and students are inducted into and understand the management and communication strategies in place for the visit. This should involve all staff having each others' mobile numbers, and checks to ensure that phones are operative whilst abroad. Academies should have a dedicated mobile phone for school visits, held by the visit leader, so that the number can be shared by students and parents. Staff may not share personal mobile numbers with students or parents. On a residential visit, at least one member of staff must be on call and contactable at all times in the event of an emergency.

Where working with a Provider (e.g. school travel company or Expedition company) or other Partner (e.g. Charitable organisation) fully discuss all aspects of the visit and its planning, against the advice within [OEAP National Guidance](#).

Budgeting for the Visit

The **Lead Teacher** will need to ensure that the visit is appropriately funded, in line with the BLT Charging and Remissions Policy, and must complete the costings information requested on the Educational Visit Confirmation Form.

The **Finance Assistant** will check the Educational Visit Confirmation Form to ensure the following:

- accuracy of workings,
- contingency applied
- cover costs applied, where appropriate
- cash flow is positive (i.e. schedule of student payments allows for sufficient receipts to be collected before payments are due to suppliers)
- the number of students required for the trip to break even has been recorded

Once the above has been reviewed, the **Finance Assistant** should sign the Educational Visit Confirmation Form, set the visit up on the academy's online payment portal, and return to the **EVC** for completion.

The above paperwork must be reviewed by the **EVC** and submitted to the **Principal** and **Chair of Academy Council** (for residential visits) for authorisation. Once the paperwork has been authorised, the **EVC** can issue the letter to parents. The **EVC** will then pass a copy of all paperwork to the **Finance Assistant** for review by external auditors.

The above must be completed well in advance of the visit but no later than **two weeks** before the letter is due to be sent to parents. As a rule of thumb, the paperwork for a day trip should be issued to parents at least one term before the visit takes place. A residential or overseas visit should be communicated up to a year in advance of the departure date, giving parents maximum time to prepare, and to make voluntary contributions in instalments.

Payments

All payments will be made on the academy's online portal. The **Finance Assistant** will monitor income from visits and keep the **Lead Teacher** informed about the trip's budget position. Where a shortfall is anticipated in a curriculum trip due to non-payment of voluntary contributions by parents, the **Finance Assistant** will contact the parent to agree a more manageable payment schedule. If an agreement cannot be reached for the full amount, the **Principal** may be approached to request a partial or full subsidy from the Voluntary or Pupil Premium funds.

The **Finance Assistant** will check that there is sufficient confirmed take-up of students for an enrichment trip to break even before the deposit is paid to the supplier. The **Finance Assistant** will then make the necessary booking arrangement for tickets, entrance fees, travel arrangements etc, in consultation with the **Lead Teacher**. If a shortfall is anticipated on an enrichment trip due to insufficient take-up, the **Lead Teacher** will be advised to liaise with the **Principal** to consider options, which will include cancellation.

Pre-visit preparation

The **EVC** is responsible for ensuring that emergency procedures are in place for each visit which comply with BLT's Business Continuity / Emergency Situation Plan. Templates are available from the [OEAP National Guidance](#) website. This should include:

- The risk assessment and any control measures that have been put in place
- Insurance contact details
- Mobile contact details for all staff involved in the visit
- School visits mobile phone number
- How to contact the emergency services if travelling abroad
- Emergency contact within the academy
- Emergency contact details for all students on the visit, including any relevant medical information.

For overseas visits, the **EVC** must also check:

- the government [Travel Advice](#) website for foreign travel to ensure the visit is not impacted by any current events (avalanches, flood, political unrest, terrorist attacks etc)
- staff and student passports must be checked at least two weeks before departure date to ensure they have at least six months validity from the date of the visit
- for overseas trips to Europe, check that all staff have a valid European Health Insurance Card

Prior to an overseas visit, the Principal must conduct a briefing with the staff team outlining expectations around professional conduct.

Emergency Situation Planning

In the unlikely event that an emergency situation occurs during a school visit, the staff leading the visit must follow the emergency procedures and BLT Business Continuity / Emergency Situation Plan. The following additional advice should be followed in relation to school visits:

- Where an incident occurs shortly before your travel, communicate with parents at the earliest opportunity to explain what you intend to do, and the actions being taken. Be clear that it is unlikely that school or its insurer would be able to refund any costs incurred by parents withdrawing their child from a visit where there is no government advice against travel. Discuss options for postponement or transfer of dates with your travel provider as an alternative, if that is possible or desirable.
- Consider how your staff team would manage an enforced group split, considering any pre-agreed rendezvous locations. Consider possible alternative meeting points, safe areas or venues, near where you intend to be, that you could use as a meeting point or as an emergency shelter.
- Consider how you would get out of the location in an emergency, bearing in mind that the direct route and planned transport might no longer be an option and, if on a day visit, consider also the possibility of an enforced overnight stay. Consider, for example, if there is a reserve of any critical medication.
- Be vigilant and aware of your surroundings at all times, especially after dark. This is especially true when arriving at accommodation, whether in the UK or abroad, where any agreed or expected security and access arrangements should be confirmed.
- Avoid congregating too long inside entrances to major public sites such as stations, museums, sports stadiums, etc. At ports and airports don't linger unnecessarily on the public side of security screening. Where you have a booking with an Educational Service at a large public facility (e.g. National Gallery, British Museum), contact the service to discuss the option of bringing your group

into the building via alternative entrances to those used by the general public, to minimise the time spent in public foyer areas where many people congregate.

- Ensure that all students know what to do in the event of any incident, or if individuals become separated. A simple 'emergency card' in the language of the host country, with names and contact details of staff would be helpful, and a similar card for UK city visits would be sensible.
- Ensure all staff have printed copies of the visit's emergency procedures

After the visit

After an overseas visit, the Principal will conduct a debrief, ensuring any incidents or accidents have been properly reported and identifying any lessons learned for future visits. A debrief may also be necessary after a day visit if an incident occurred during the visit which requires follow up action.

Once the visit has ended, the **Finance Assistant** must complete the Educational Visit Completion Record (appendix F) which should then be signed by the **Lead Teacher** and the **Finance Assistant** after review.

Any shortfall or surplus should be investigated and a reason given (mis-costing, pupils withdrawing from the visit, etc). Significant shortfalls may be recharged to departments.

After completion of a visit and all associated paperwork, the **Finance Assistant** must send the complete pack to the Central Finance Team to complete the final transactions on the finance system, and to retain the paperwork for audit purposes.

POLICY REVIEW AND RATIFICATION

Policy reviewed annually and ratified by Finance Committee in April

This review by Finance Director April 2019

Summary of amendments to this iteration:

1. Reordering by process instead of by role
2. Inclusion of section on general guidance for planning visits and assessing risks
3. Inclusion of section on pre-visit preparation
4. Inclusion of section on emergency situation planning

Ratified by Finance Committee April 2019

Next review April 2020