

# 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. 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.

### Educational Visits Co-ordinators

Each academy must appoint an Educational Visits Co-ordinator (EVC) who has oversight of the visits being undertaken, and helps the Principal and other colleagues in the academy to manage risks.

EVCs 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 annual calendar of visits must be communicated to the Finance Assistant so that the finance system can be updated.

EVCs must liaise with Lead Teachers to ensure all the paperwork is completed. Prior to a visit taking place, the EVC must:

- Review risk assessments (template in appendix A, guidance in appendix B)
- Review Residential Visit Activity Schedule (appendix C)
- Review Educational Visit Confirmation Form (appendix D)
- Review letter to parents (template in appendix E)
- Ensure visit is appropriately funded, in line with the BLT Charging and Remissions Policy.
- Obtain approval from the Principal for all educational visits
- Obtain approval from the Chair of Academy Council for residential visits.
- Pass a copy of all paperwork to the Finance Assistant for review by external auditors

The EVC is responsible for ensuring that emergency procedures are in place for each visit. This should include:

- Ensuring that all staff involved know who is the emergency contact within the academy
- Having access to an emergency plan appropriate to the visit
- Ensuring that the emergency contact and the Lead Teacher are in possession of emergency contact details for all students on the visit, including any relevant medical information.

## Lead Teachers

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.

Prior to a visit, the Lead Teacher will complete the following paperwork for approval by the EVC:

- 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.
- 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. Any queries around budgeting for the visit should be routed through the Finance Assistant.
- Risk assessments (appendix A and 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.
- Letter to parents (appendix E)

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. Once all paperwork has been approved, the letter can be sent out to parents.

All paperwork should then be passed to the Finance Assistant who will maintain records for audit purposes.

All payments should be made via the academy's online payment system.

Booking and payment arrangements should be made by the Finance Assistant in consultation with the Lead Teacher.

Where a shortfall is anticipated due to non-payment of voluntary contributions by parents, the Lead Teacher should liaise with the Finance Assistant who will contact the parent to agree a more manageable payment schedule, or if necessary liaise with the Principal regarding a subsidy. Where a shortfall is identified in an enrichment trip due to the take up of places being lower than the break-even number, the Lead Teacher should liaise with the Principal to consider next actions, which may include cancelling the trip.

After the visit has concluded, the Lead Teacher must review and sign the Educational Visit Completion Record (appendix F) with the Finance Assistant. With proper planning and budgeting, significant shortfalls should not occur. However, in such an event, shortfalls will be charged to departments. Reasons for any shortfall/surplus must be given.

## The role of the Principal

The Principal is responsible for:

- 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

### The role of the Finance Assistant

The Finance Assistant is responsible for oversight of the funding of educational visits. The Finance Assistant must check the Educational Visit Confirmation Form for the following:

- Check workings for accuracy and reasonableness
- Check that a contingency has been applied
- Check that cover costs have been applied where necessary
- Check that travel insurance is included for any foreign visits
- Check cash flow for the visit (i.e. that the schedule of student payments allows for sufficient receipts to be collected before payments are due to suppliers)
- Calculate the number of students required for the trip to break even

Once the above has been reviewed, the Finance Assistant should sign the Educational Visit Confirmation Form and put a copy in the box file for the Central Finance Team so that the visit can be set up on the finance system.

All contributions and permissions should be made via the academy's online payment portal.

The Finance Assistant will 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.

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 will 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 2018

Summary of amendments to this iteration:

1. Removal of all references to payments by cash and cheque and return of permission slips, replaced by use of online system for payments and permissions
2. Inclusion of requirement to calculate breakeven number of places for enrichment trips for early anticipation of financial shortfall.

Ratified by Finance Committee April 2018

Next review April 2019