



Merchant Taylors'
School

Ambition | Character | Excellence

Management of Educational Visits Policy

Policy owner:	Assistant Head Operations
Type of policy:	Procedure and regulatory Policy
Regulatory Body:	Department for Education / Independent Schools Inspectorate
Relevant Legislation / Guidance:	DfE KCSIE 2023 DfE 'H&S of pupils on Educational Visits' Educational Visits National Guidance
Last reviewed by / date:	Assistant Head Ops November 2023
Last approved by / date:	Head of Girls' School November 2023
Next review due:	September 2024
This version published:	6
Circulation:	✓ All Staff
Linked Policies:	Safeguarding Policy First Aid Policy Data Protection Policy Trips Policy Code of Conduct – Staff Code of Conduct - Pupil Mobile Phone Policy

Page 3	Managing Educational Visits Policy
Page 13	Appendix 1 – Educational Visits Process
Page 14	Appendix 2 – Educational Visits Classification
Page 15	Appendix 3 – Adventure Activities
Page 16	Appendix 4 – Guidance for Staff

Introduction

Out of school trips provide a valuable enrichment to the curriculum. Well planned and conducted school trips offer young people enjoyable and memorable learning experiences, which can have a lasting, positive impact on their personal and social development. It is the School's policy to provide the maximum opportunities for diverse experiences. The School recognises that many members of staff give freely of their own time to carry out activities for the benefit of pupils. Each school trip must have clear aims and must contain activities within the scope of the participants.

The Educational Visits Co-ordinator (EVC) is the champion for all aspects of visits and outdoor learning. Their role is to support and oversee the planning and preparations for any visit. The EVC at Merchant Taylors' Schools (MTGS/MTBS/Stanfield) are responsible for recording all educational visits and trips via EVOLVE. The EVC will assist members of staff with planning and timetabling and will ensure School policy and procedures are followed.

Staff organising overseas trips must present a proposal to the Executive Team and consult with the EVC (and the School DFO/Finance team where appropriate) and involve them in decisions at the planning stage.

Educational visits national guidance (NG) can be found on the Outdoor Education Advisers Panel (OEAP) web site: <https://oeapng.info/about-oeap/> There is reference to NG documents in this document from the OEAP website.

All decisions regarding trips, both in the planning stages and while the trip is out of school, will pay strict attention to the guidance given in Keeping Children Safe in Education (Sept 2023) see link below. This document says "safeguarding and promoting the welfare of children is everyone's responsibility" and "everyone who comes into contact with children and their families and carers has a role to play in safeguarding children". Safeguarding is the responsibility of all adults accompanying any school trip, not just the trip organisers. [KCSIE 2023 Part 1](#)

Data Protection

Merchant Taylors' School takes its responsibilities for personal data very seriously and has policy in place to ensure compliance with the Data Protection Act 2018 incorporating the General Data Protection Regulations [GDPR]. The data collected when dealing with educational visits and school trips will contain data that is defined by the Data Protection Act 2018 as 'special category' data. This is the most sensitive category of data and as such it is essential that every care is taken to keep the data secure.

If there is any possibility that the data has been lost then it must be reported immediately to the Privacy Officer for investigation. Any confirmed loss of special category data is reportable to the Information Commissioner's Office and may result in an external investigation.

All staff involved in collecting and processing data relating to educational visits and school trips must ensure they have read, understand and operate according to the school's Data Protection Policy. They must also be familiar with the school's Privacy Notice to ensure any processing required that is not covered by the Privacy Notice is reported to the Privacy Officer.

Approval and Notification of Activities and Visits

All visit planning is done electronically using the EVOLVE trip management system. This can be accessed either through the firefly home page or via the EVOLVE go app (on a mobile device).

There are various stages to gaining approval for a visit and the EVOLVE system requires the visit leader to complete a series of questions and provide certain details about the visit (see Appendix A for flow chart).

- The first stage is to gain outline approval. EVOLVE will require information and will tailor them according to the responses at various stages, initially asking about the type of visit being planned. Outline approval should ideally be submitted a term in advance and this will be approved by the EVC. The calendar will be checked for clashes and any other issues.
- Once outline approval is given, the visit organiser can proceed in the planning. At this stage letters can go out to parents advertising the visit and arrangements for any costs to be met. EVOLVE will require further information before the trip leader can submit the trip to the Head for full approval. This must be done at least 10 working days before the visit is due to go out.
- A meeting between the EVC and trip organiser should be arranged to sign off final details of the trip and to review arrangements and risk assessments.
- A safeguarding meeting of all members of staff accompanying the trip led by the school's DSL to discuss pastoral and medical concerns of pupils on the trip along with arrangements to manage pastoral and medical concerns will take place 10 days before the trip departs.
- EVOLVE will send out notifications to various staff who will need information about the visit, such as the cover manager, or reception who book minibuses and who monitor attendance.
- On the visit the EVOLVEgo app allows staff to register the group (which will be picked up by reception) as well as access details of participants on the visit.
- Post visit, EVOLVE will ask the visit leader to complete an evaluation. Issues arising from the visit will be picked up by the EVC.

This policy and all other shared resources (consent forms, emergency cards, trip letters, behaviour contracts for overseas visits etc) are available on MTS Cross School in Educational Visits folder and also in Teams.

Sport fixtures and trips as part of the weekday activities programme are approved by the Directors of Sport/Heads of PE and the Assistant Head Co-curricular.

The competence of the Visit Leader is the key component in ensuring the safety of the participants. Assessment, training and support of Visit Leaders is a priority of the EVC.

All School trips have a named organiser who must be a serving member of staff at Merchant Taylors' School. The approval procedure for approval is to be completed by the Visit Organiser. Training on the EVOLVE system will be given to staff, but help can be sought from the EVC.

Preliminary Visits and Provider Assurances

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third-party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. It is also a vital dimension of risk management. Wherever reasonably practicable, it is good practice to carry out a preliminary visit. The EVC will advise on this in each specific case. A pre-visit is usually required for visits where there is a high complexity factor and

the visit has not happened previously, or when the visit is adventurous and led by Merchant Taylors' School member of staff, a new DofE day walk for example.

Residentials, visits abroad, exchange visits, adventure led by school staff all have aspects of complexity. If the visit is led and managed by a provider, then a variety of approaches can reduce the need to pre-visit.

It is good practice for Visit Organisers to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy.

Examples of such schemes include:

- The LOtC Quality Badge
- AALA licensing
- Adventuremark
- School travel forum
- NGB centre approval schemes

Merchant Taylors' School takes the view that where a provider holds such one of the above accreditations, there should be no need to seek further assurances.

Insurance for Off-site Activities and Visits

Employer's Liability Insurance is a statutory requirement and Merchant Taylors' School has arranged a policy that will respond and, if appropriate, indemnify against all claims for compensation for bodily injury suffered by any person with a contract of employment. This cover also extends to those persons who are acting in an authorised voluntary capacity as assistant supervisors. Merchant Taylors' School also holds Public Liability insurance, which will indemnify the school against all claims for compensation for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, third party property where Merchant Taylors' School are deemed to have been negligent. Employees (as agents of the employer) are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer's staff if they commit a negligent act. The indemnity includes activities such as off-site activities and outside visits organised by all departments for which Merchant Taylors' School may be considered responsible.

The School also holds comprehensive travel insurance for staff and pupils. Details of the Policy are available to trip leaders and can be sent to parents as part of pre-trip administration. If in doubt consult the Procurement Manager as they will be able to advise. Refer to NG document: 4.4c [Insurance](#)

Personal Liability and Insurance

The law places the Group Leader "in loco parentis". The DfE Guidance "The Health and Safety of Pupils on Educational Visits 2018: [H&S of pupils on Educational Visits](#) and explains that the Group Organiser's responsibility is to "act as any reasonable parent would do in the same circumstances."

Members of staff who take part in visits and activities outside School may feel concerned about the possibility of being held personally liable if an accident should occur. However, they can be assured that Merchant Taylors' School, as their employer, will always stand behind them in the unlikely event of an accident occurring, provided they have exercised all reasonable care and followed the School's guidelines.

Members of staff and pupils of Merchant Taylors' School are covered by the School's insurance policy. Cover includes cancellation or delay, medical expenses, replacement of passports, personal possessions and money.

The policy covers most school visits, including skiing holidays, but does not cover all adventurous activities, such as climbing or scuba diving or ski racing. Any member of staff organising an adventurous or hazardous activity should therefore check, via the DFO, whether or not the activity is covered by the School's policy. An extension usually can be arranged. The Group Organiser should ensure that he or she takes a copy of the School's travel insurance with him or her on all but the shortest of visits. Full details of the School's insurance policy may be obtained from the DFO.

Staff should not transport pupils in their private cars, and never to allow pupils to be transported in cars belonging to parent helpers (unless the parents make a private arrangement that does not involve the School). In an emergency a member of staff can transport a pupil in his or her car, such as taking a pupil to hospital. Insurance cover is provided through the School's insurers for emergency situations.

Inclusion

Every effort should be made to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender or religion. If a visit needs to cater for young people with special needs, every reasonable effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

Merchant Taylors' School take all reasonably practicable measures to include all young people. The principles of inclusion should be promoted and addressed for all visits and reflected in establishment policy, thus ensuring an aspiration towards:

- an entitlement to participate
- accessibility through direct or realistic adaptation or modification
- integration through participation with peers

Under the Disability Discrimination Act 1995, it is unlawful to:

- treat a disabled young person less favourably;
- fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification.

Employers, Heads/Managers, Curriculum Planners, EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a Legal issue. Refer to NG document: 3.2e [Inclusion](#)

Consent

Parents give a general consent to all non-residential or adventurous Educational Visits on entering Merchant Taylors' School by signing the 'Terms and Conditions'. This consent applies to the following:

- Educational Visits: A variety of school trips will be provided for pupils whilst at Merchant Taylors'. The cost of some school trips will be charged as an extra and may be added to the bill or paid separately. Parents' prior consent will be sought for a trip incurring additional costs.
- Transport: Use of public transport or school transport driven in a responsible manner by an adult who is suitably qualified and insured.
- All Educational Visits require written communication with parents as specific information needs to be given on timings, equipment etc. Example letters are available in the EVC folder on MTSCrossSchools or via the EVC.
- All trips that involve additional costs and require payment by parents, trips outside of normal school hours, all residential trips and all adventurous activities must have specific parental consent. Three

standard Consent Forms are available on EVOLVE for day trips, residentials and overseas trips. These can be added to for specific trips.

- Pupils and parents will also be expected to sign an Educational Visits Behaviour Contract for major residential trips. This issue will be discussed at the pre-trip meeting with the EVC to deem whether this is necessary.

Charges for Off-site Activities and Visits

Each proposal is judged on its merits by the EVC, however, Merchant Taylors' School have the following protocol for charging for visits:

- If the trip is compulsory in School time and required for the scheme of work then it is usual that the School covers the cost or provides a significant subsidy.
- If the trip is optional or out of curriculum time then the cost of the trip is passed on to parents.

Safety and Behaviour

Safety of pupils on trips is of paramount importance to the School. Risk Assessments are carried out by party leaders in advance of all School trips and all reasonable care is taken to look after the welfare of pupils on trips. We expect parents to support the School in ensuring that pupils follow the instructions given either by a member of staff, or by a qualified instructor, and use the proper equipment. We reserve the right to send any pupil home early at their parents' expense if they decline to follow reasonable instructions given for their own safety or do not follow the School's code of conduct.

As an employer, Merchant Taylors' School has a legal duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" or "tolerable" level, as would be a reasonable expectation when risk assessing a piece of machinery, workshop or manufacturing process. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring Merchant Taylors' Schools to provide such support, training and resources to its employees as is necessary to implement this policy.

The risk management of an activity should be informed by the benefits to be gained from participating. Merchant Taylors' School promotes a "Risk-Benefit Assessment" approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put in place) is "acceptable". HSE endorse this approach through their Principles of Sensible Risk Management and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

Merchant Taylors' School has adopted a format that involves a 5x5 matrix. The process and procedures for carrying out a risk assessment are set out in detail in the Risk Assessments folder available on MTSCrossSchools.

Mobile Phones/Laptops

School rules for Acceptable Use of your own personal device and for the pupils use of their own device apply on every school trip. Photographs of pupils on the trip can only be taken and stored by staff using a school-issued mobile phone or device. Use of personal phones for this is a breach of the AUP and the staff code of conduct.

For communication with staff during a school trip pupils will be provided with the phone number of the school-issued mobile phone for use in emergencies during 'free time', so that they can contact the trip organiser if necessary.

The school's AUP states that 'School departments and clubs will often set up their own social media pages to update pupils with information – this is entirely acceptable. These accounts must allow access by all. The ICT Services Department and members of SMT reserve the right to access these accounts to monitor their use.' Permission to set up social media pages must be sought from the Executive Team in advance.

Use of social media platforms eg WhatsApp for communication methods is allowed only through prior agreement with the Executive Team and parents. WhatsApp groups set up with permission should only include MTS pupils and MTS Staff work mobile numbers. If it is deemed necessary by the nature and length of the trip to collect pupil mobile contact details, parental permission will always be sought in advance, and this personal data will only be held and used for the duration of the trip. Further guidance can be found here [Data Protection Policy - Practical Guidance for Staff.pdf](#)

Training

The relevant training courses for Merchant Taylors' School are:

- Educational Visit Coordinator (EVC) Training - Merchant Taylors' School is required to have a current, trained EVC in post for all three schools. The Heads of Sport and Activities also act as Visit Coordinators for their areas of responsibility.
- Merchant Taylors' School Educational Visit Coordinator (EVC) Revalidation - all Merchant Taylors' School EVC's are required to undertake a formal revalidation from time to time (3-5 years)
- Visit Leader Training – all visit organisers have training and support from the EVC and an 'apprenticeship' system is operated with experienced staff mentoring staff with less trip experience. All new staff have 'visit leader training' as part of their induction programme.

Role of the Education Visits Co-ordinator

The Education Visits Co-ordinator (EVC) supports the Head in the process of approving visits, ensuring that they are spread through the different age groups, and the School year, although there is inevitably a concentration during the last part of the summer term, when exams have finished. Overseas Trips are planned and published on a 3-5 year cycle. EVC's help members of staff involved with organising trips, ensuring correct procedures are followed, and keeps records of all previous visits.

Role of the Trip Organiser

Every trip or visit, no matter how short, must be planned in advance by the member of staff who is in charge of organising and running it. He or she will usually have had experience of accompanying school visits before taking on the role of Trip Organiser.

At Merchant Taylors' School, the EVC and DFO are available to brief potential Group Leaders, providing practical guidance on conducting risk assessments, emergency procedures, the School's insurance cover, budgeting for visits and the circumstances under which a visit might be terminated or curtailed; for instance, if weather conditions suddenly deteriorated.

Other than for certain visits, such as to a London theatre or museum (in cases such as these they must identify where first aid may be sought on the trip), we expect all Group Leaders either to hold a valid First Aid

certificate, or ensure that one of the other teachers accompanying the visit holds one. In certain circumstances where this is not feasible, first aid support will be identified at points of travel and venue/school being visited.

A Deputy Trip Organiser should be nominated for all trips. He or she may not hold the qualifications of the Group Organiser, but is nevertheless capable of taking over that role, if necessary.

The School minibus may be used for trips provided the driver has qualified as a School minibus driver. Drivers must be suitably rested before a long journey and take a 15 minute break every 2 hours. School holds a list of all staff who have undertaken training and are able to drive the school minibuses. The School will arrange and fund First Aid courses for all staff who are involved in visits. A list of qualified First Aiders is held at school.

Members of staff who would like to organise visits should first discuss their proposals with the EVC and use EVOLVE to gain outline permission. These plans should be agreed as far in advance of the visit as possible. At all times, it is essential that all members of staff are informed well in advance of plans for forthcoming visits. This includes providing lists of pupils who will be missing lessons. In some instances, the Head, Head of Houses or the Assistant Head with responsibility for Sixth Form may veto participation.

Assessment of Leader Competence

Employer Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of the Merchant Taylors' School Policy that all leaders and assistants have been assessed as competent to undertake such responsibilities as they have been assigned in line with national guidance. To be 'competent' also includes completing specific Merchant Taylors' Schools Minibus driving qualification.

Adventurous Activities – see appendix C for list

Merchant Taylors' School acknowledges the immense educational benefits that adventurous activities can potentially bring to young people, and fully supports and encourages adventurous activities that are correctly planned, managed, and conducted.

Competences to lead outdoor activities should be demonstrated by holding the relevant National Governing Body (NGB) award where it exists. Where there are queries regarding the competencies/experience required the EVC will contact outdoor professionals for advice. All centres and providers used by the school for the provision of adventure activities will hold a current AALA licence.

Other Areas

Staff competence in first aid, minibus driving, lifesaving etc may also be needed, depending on the activity. Volunteers will also require induction training prior to a specific visit. Training requirements in these areas should be identified as part of the risk assessment process. Refer to NG document: 3.2d/4.4a Assessment of Competence

Role-specific Requirements and Recommendations

Employer Guidance sets out clear and detailed responsibilities and functions of specific roles within Merchant Taylors' School. Refer to NG documents:

- 3.4f Member of Management Board or Governing Body
- 3.4g Head teacher/Manager

- 3.4j EVC
- 3.4k Visit or Activity Leader (this document should be consulted by visit organiser)
- 3.4l Assistant Leader
- 3.4m Helper
- 3.4n Guidance for Parents
- 3.4o Volunteers

Transport

Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it. All national and local regulatory requirements must be followed.

Minibuses

- It is a requirement of Merchant Taylors' School Policy that all staff must be aged 21 and over, category D1 entitlement on their driving licence and have completed Merchant Taylors' School training to drive a vehicle over 3.5 tonnes and up to 16 passengers. Without a D1 entitlement, staff over 21 may drive a vehicle up to 3.5 tonnes and 16 passengers once they have completed their minibus training provided through school.
- The level of supervision necessary should be considered as part of the risk management process when planning the journey, considering issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus. It may be appropriate to have a dedicated driver if travelling late after school or in other particular circumstances. Also see NG document: 4.5b Transport in Minibuses

The Visit Leader should ensure that coaches and buses are hired from a Merchant Taylors' School approved company. The Procurement Manager can assist with this.

Staff must not transport pupils in private cars requires. Staff cars should only be used in special circumstances or to transport students in 'unplanned' or 'emergency' situations. For example, journeys to hospital. In this case, the school's insurance covers emergency situations. Refer NG document: 4.5a Transport: General Considerations

Staff/Pupil Ratios

The DfE recommended staff to pupil ratios for visits and off-site activities is set out below. Merchant Taylors' School trips should always follow these guidelines. In addition, all overnight trips should include at least two members of staff, with at least one of them being of the same sex as the pupils on the visit. The final decision regarding the permitted staff to pupil ratios lies with the EVC.

In general terms, the Law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is "effective".

Effective supervision should be determined by proper consideration of:

- Staff Competence
- Activity - nature and location of the activity (including the type of activity, duration, skill levels involved)
- Group - age (including the developmental age) of the group; ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics);

- Environment - nature and location of the activity (including the type of activity, duration, skill levels involved, as well as the time of year and prevailing conditions), distance away from the base.

However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years. Refer to NG document: 4.3b Ratios and Effective Supervision Refer to NG document: 4.2a Group Management and Supervision

This National Guidance suggests that the risk assessment process should determine the ratios, although for younger pupils the ratios will be much smaller eg 1:8.

Ratio	Pupils' Year Group
1:6	EYFS (2 for the first 6)
1:10	Junior School (2 for the first 10)
1:15	Years 7 upwards (2 for the first 15)
1:10	All visits abroad (2 for the first 10)

Risk Assessment (or Risk Management)

Risk Assessments will also go some way towards establishing that the proposed trip is as safe as possible. Refer to NG document: 4.3c Risk Management

Although school trips cannot be completely risk free, the vast majority of young people who participate in them do so entirely without incident or injury. All Group Leaders at Merchant Taylors' School need to complete risk assessments on the potential hazards involved in a visit, trip or activity that they are planning: these will help to establish the appropriateness of the trip, the effectiveness, efficiency and economy of the proposed venue and will focus thoughts on the skills and training requirements of accompanying staff.

In assessing risk, organisers should always consider the objectives of the exercise and ensure that the risks to the participants are the minimum necessary to achieve those objectives. Safety is the prime consideration; it should not be compromised in order to meet educational or other objectives. Activities should not proceed or continue if risks are assessed to be or to become too high. Risk assessment forms should:

- Identifying the potential hazards of the place being visited.
- Listing the groups of people that are especially at risk from the significant hazards.
- Identifying control measures for each hazard that reduce the associated risk to an acceptably low level.
- Considering how he/she would cope with the hazards which are not currently identified or fully controlled.
- Carrying out continual monitoring of hazards throughout the visit.

Professionally operated licensed activity centres and tour operators specialising in school visits will conduct their own risk assessments. The Group Leader should ask for copies at the planning stage. Provided that he or she is satisfied, the risk assessments for the activity part of the visit will meet the requirements of Merchant

Taylor's School. However, additional risk assessments will probably be needed to ensure complete coverage of all aspects of the visit. Detailed advice on risk assessment can be obtained from the EVC. Risk assessments carried out by the School for previous visits can generally be updated and re-used, unless there has been a change of circumstances. Prior to trips, the Trip Leader checks the licensing of the relevant adventure activities centres and gives copies of the licence to the EVC.

Preparatory Arrangements

The amount of advance preparatory work needed will obviously vary considerably with the type of activity. Very little preparation may be needed for a trip involving a coach ride direct to the destination. By contrast, a visit lasting a week or more to a country outside the EU, requires considerable preparation. Repeat visits and shorter visits may need less planning, and can be arranged at shorter notice, though it is always desirable to provide as much notice as possible when planning visits for school holidays.

Good practice requirements

To be deemed competent, a Merchant Taylor's School Visit/Trip Organiser, or Assistant Trip Organiser must be able to demonstrate the ability to operate to the current standards of recognised good practice for that role. All staff and helpers must be competent to carry out their defined roles and responsibilities. Employer Guidance sets a clear standard to which Merchant Taylor's School leaders must work. The guidance states:

“a competent Visit /Trip Organiser (or an Assistant Trip Organiser where they may take sole responsibility for a subgroup) requires:

- Knowledge and understanding of their employer's guidance supported by establishment-led training.
- Knowledge and understanding of establishment procedures supported by a structured induction process specified by the establishment.
- Knowledge and understanding of the staff, the activity, the group and the venue.
- Appropriate experience
- In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification.”

Staff participating in off-site activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff. The School should view the original documents and certificates when verifying leader's qualifications, and not rely on photocopies.

Where a Staff Member or Volunteer Helper is a parent (or otherwise in a close relationship to a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the Visit Organiser's plans for group management. The Visit Leader should directly address this issue as part of the Risk-Benefit assessment and consider this in staff/pupil ratios. Refer to NG document: 4.3a Good Practice Basics

APPENDIX 1

Educational Visits Process

Input trip details on EVOLVE to request OUTLINE APPROVAL. If it is an overseas trip, present a proposal to the Executive Team
EVC will check the visit outline and calendar for clashes. Approval will be given or the form will be returned
Arrange transport and other logistical arrangements
Send letters to parents, requesting consent and medical updates
Add detailed planning to EVOLVE using school policies, National Guidance and advice from EVC
Complete all risk assessments
Check medical details of staff and pupils. Consult with school nurse and arrange first aid kits
Arrange meeting with EVC for final sign off
Arrange safeguarding meeting with DSL and staff on trip
Trip forms sent to Head for final approval
Use EVOLVE go app to register pupils on trip
Post trip evaluation to be completed on EVOLVE

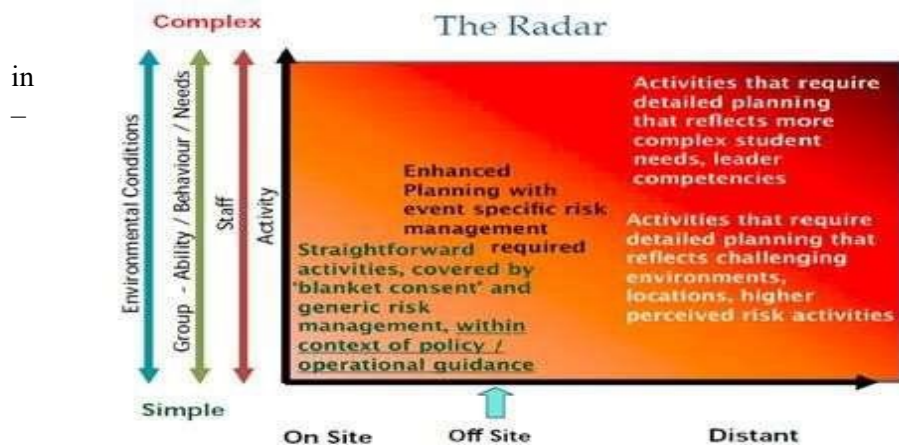
APPENDIX 2

Educational visit classification

The classification of an educational visit predominantly rests on 2 factors. Firstly, the location of the visit; such as a visit to a local venue, or further afield, or a trip abroad. Secondly the complexity of the trip; a visit to a museum or a theatre is a simple trip in comparison to an adventurous trip involving skiing or mountain walking.

The complexity depends on several variables that can impact on any given activity. These variables can be remembered as “SAGED”. The graph shows this visually.

- Staffing requirements – trained? experienced? competent? ratios?
- Activity characteristics – specialist? insurance issues? licensable?
- Group characteristics – prior experience? ability? behaviour? special and medical needs?
- Environmental conditions – like last time? impact of weather? water levels?



- Distance from support mechanisms place at the home base transport? residential?

BASIC DAY Educational Visits

Local visits to for example; theatre, workshops, museums, conferences, other educational establishments

DAY Educational Visits

All more complex visits which are further afield or involves a more hazardous activity for example; all outdoor pursuit activities, rowing regatta, golf tournament, field trip to Malham, zoo visit

RESIDENTIAL Educational Visits

Any visit which involves more than 1 day becomes more complex, for example; DofE, residential fieldwork, all trips abroad come into this category.

NB. There are activities that the school insurance will not cover. These are the more extreme activities such as off-piste skiing or rafting. If in any doubt ask the EVC or check with the Estates and Facilities Manager.

APPENDIX 3

Adventure Activities

Below is a list of 'Adventure Activities' as agreed by Local Authority outdoor education advisors.

Before our students take part in any of these we need to be sure that the relevant National Governing Body qualifications are held by the person/organisation running the activity or a technical advisor has provided a statement of competence.

- All activities in 'open country' such as D of E Expeditions.
- Swimming (all forms, excluding publicly life-guarded pools)
- Camping where participants/leaders erect tents and/or self-cater.
- Canoeing / kayaking
- Sailing / windsurfing / kitesurfing
- Rafting or improvised rafting
- Use of powered safety/rescue craft
- All other forms of boating (excluding commercial transport)
- Water skiing
- Paintball (including 'Laser Quest')
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Mountain biking
- Rock climbing (including indoor climbing walls)
- Abseiling
- River/gorge walking or scrambling
- Coastering/coastal scrambling/sea level traversing
- Underground exploration (Except designated 'Show' caves)
- Shooting and archery
- Skiing, snowboarding, and related activities (including dry slope)
- Air activities (excluding commercial flights)
- Horse riding
- Motor sport – all forms
- High level ropes courses
- Other activities (e.g. initiative exercises) involving skills/risks inherent in any of the above

The Governing body has decided that it is not appropriate for the following activities to be undertaken by pupils at Merchant Taylors' Schools':

- White water rafting
- Off piste skiing
- Bungee jumping
- Any other extreme sports

NB. It must be noted that certain adventurous activities will not be covered by the Schools' insurance. If in any doubt consult the EVC or the Estates and Facilities Manager.

APPENDIX 4

Guidance for staff involved with school visits

The large number of trips, out of school activities and visits at Merchant Taylors' School provide an important part of our educational ethos. We expect every member of staff to support and endorse the educational value of activities outside the classroom. The School encourages participation and always welcome suggestions from staff for new trips.

A: Guidance for taking pupil out of school (MTS)

In an ideal world, school trips will cause minimum disturbance to other lessons. In order to ensure that as few lessons are missed as possible, the School's stance is currently to restrict daytime trips as follows

- In Years 7 – 9, the number of daytime trips is restricted to a maximum of one per subject per key stage; for Years 10 and 11, one trip may be taken across the two years, unless the trip is a curriculum requirement.
- In the Sixth Form, the number of daytime trips (including revision conferences) is normally restricted to a maximum of one per subject across the two years. A second trip may be allowed at the discretion of the Assistant Head with responsibility for Sixth Form following consultation with the Head.
- Daytime trips for Years 10 – U6 must have direct relevance to the curriculum. Members of staff should seek guidance on this matter from the Head and/or the Assistant Head with responsibility for Sixth Form before planning such trips.
- No daytime trips for Year 11 may take place from February half term through to study leave in the summer term (unless an explicit requirement of the examination specification), and daytime trips in the first half of the Autumn Term should be kept to a minimum.
- No daytime trips for Sixth Form may take place in the summer term before study leave, and daytime trips in the first half of the Autumn Term should be kept to a minimum.

In certain circumstances, it may be necessary to restrict the number of evening trips for pupils in Year 11 and Sixth Form

Curriculum based visits:

- If a visit is part of a course and/or compulsory for the students then it would be approved, once the school calendar has been consulted to check for clashes. The demands on the timetable and time of year would also be considered for implications of staffing and also impact on learning. Example of these trips would be where it is part of a coursework element to a course.
- For examination classes in particular missing lesson time close to the examination period is not advised and trips are unlikely to be approved except under exceptional circumstances.

Optional Visits

- Optional visits should take place outside of school hours to avoid cutting across lesson time. This means after school, weekends or during holidays.
- There may be instances where trips may be approved during school time, although this would be the exception rather than the norm and there would be particular circumstances which would need to be considered if this were the case.

- In the summer term after the main internal examinations are complete optional trips may be approved, once the school calendar has been consulted to check for clashes.

Any other trips:

- All visits will be considered based on their merit and purpose, for example, certain events which are offered to schools may only run in termtime and would therefore be considered to occur during school hours.

Sporting fixtures/activities:

- Sports fixtures should take place during normal games sessions/after school or on a Saturday morning. If travelling to a fixture this should not cut across academic lessons and permission is unlikely to be given.
- In certain circumstances permission would be given for a sports fixture/activity to go ahead, such as a cup fixture if it cannot be played in the normal timeslots or swimming galas which demand the swimming team to travel to various venues on certain days of the week. The timings of fixtures played away will be discussed with the Assistant Head Co-curricular to minimise impact on academic lessons.

Notes:

- In all circumstance's visits/fixtures/activities must not be booked/confirmed until approval is given.
- Permission for visits is sought via the EVOLVE trip management system and this should be done at the very start of the planning process. Please consult the Assistant Head Co-Curricular or EVC for further advice.
- Visits will be put in the school calendar and forthcoming events. They will take precedence over a trip which is planned last minute if there is a clash.

B: Planning Schedule for Overnight/Overseas Trips

The list that follows is designed to cover all the planning that a Group Organiser needs to undertake for a longer type of visit. It is designed to be as comprehensive as possible.

In advance (preferably providing 12 months' notice):

- Obtain advice from the EVC on suitable dates, precedents etc.
- Present a proposal of the trip to the Executive Team
- Discuss preliminary plan, including purpose, location, transport, hotels, activities, itinerary, number and age of participants with the EVC and the DFO.
- Calculate the staff to pupil ratio.
- Prepare a draft itinerary.
- Decide mode of transport for all legs of the journey.
- Prepare fully inclusive costs for the visit, including an appropriate contingency for delays and emergencies. The costs of the accompanying staff must be included.
- Check that the provider of adventurous activities is licensed and the individual instructors possess a recognised qualification from a national body, such as the Adventure Activities Licensing Authority.

- Obtain a clear statement from the centre about their responsibilities for the safety of the pupils before making any commitment. Ask for copies of their risk assessments.
- Prepare suitable risk assessment(s).
- Check the School's insurance cover, if the visit involves hazardous activities. Some travel companies provide their own insurance, consult with the Procurement Officer to confirm whether this is required or whether the school's insurance company is used.
- Find other members of staff who are willing to participate in the trip, bearing in mind the need to have sufficient male/female teaching staff for residential trips. It is desirable to have at least one member of staff who speaks the language of the country to be visited. Discuss possibilities with the EVC before making final decisions on staffing. We do not usually encourage parents to accompany school visits. If parents are used to supervise the pupils, those parents must have up-to-date DBS disclosures from the School.
- Check that the tour company/airline is ATOL/ABTA bonded to provide cover in the event of the bankruptcy of the provider.
- Carry out a reconnaissance visit if the location is not one that the School has visited before. If a reconnaissance visit is impossible, a reference from another school that has visited the site may suffice.
- Establish the minimum and maximum numbers for the visit to be viable, bearing in mind that the costs of the accompanying staff will be divided amongst the participants.
- Ascertain the medical and visa requirements.
- In conjunction with the School's Finance Officer, establish when the deposits are required by tour operators/airlines/activity centre, etc, and ensure that the size of the deposit requested from parents is sufficient to cover these costs (including the costs of deposits for accompanying staff).
- Depending upon the destination: check with the Travel Advice Unit of the Foreign and Commonwealth Office.
- Complete the appropriate EVOLVE steps to get outline approval for the trip.
- If necessary, attend a First Aid course and/or obtain suitable minibuss driving training beforehand.
- Write a preliminary letter to send to parents and guardians of the target age group, outlining the purpose of the trip, the programme and the expected maximum cost. Use the letter template to help construct this letter. Ask for agreement to join the trip, together with a deposit cheque payable to the School by a specific date. Mention that parents will be invited to a briefing meeting within six weeks of departure. Explain any restrictions on numbers. These letters should always be cleared in advance with the EVC.
- Check with the Finance Team if there are any pupils who are not eligible to participate on an optional trip if their fee bills are in arrears.

After Permission is granted (ideally six to ten months in advance):

- Brief the pupils about the visit, its dates and purpose.
- Check names of all pupils wishing to participate with the School Nurse. Discuss with the DSL concerns about special arrangements that may be required for handling any specific medical or SEND issues.
- Collect deposits and arrange with the Finance Team to set up a unique cost centre in the School accounts for the trip.
- Work out the final cost for parents (including contingency to cover delays etc).
- Arrange with the Finance Team to bill parents for the balance of the cost of the trip, using EVOLVE pay.
- Arrange for the Finance Team to pay deposits on hotels, flights, activity centre etc.

Ideally three months in Advance:

- Finalise the costs with travel company etc.
- Insist that all coaches are fitted with seat belts. This may not be possible in every country.
- Inform parents of the medical and visa requirements. Advise parents of non-British passport holders that they are responsible for ascertaining the visa requirements of the country to be visited within good time of the trip.
- Arrange for the Finance Team to pay the balance to the airline, hotel, travel company etc.
- Arrange with reception for loan of School mobile with pre-paid SIM card valid for the country to be visited to be available on a specific date.
- Brief and prepare the pupils in advance.
- Ensure that they are given plenty of advance notice if they need special equipment (e.g. for skiing).
- Send all parents a copy of the consent form and ask for details of contact numbers with specified return date.
- Obtain personal, medical and special dietary details and how parents or guardians may be contacted in an emergency.
- Obtain photocopies of each pupil's passport.
- Check that all trip helpers or volunteers (e.g. trained DofE course leaders) have up-to-date enhanced DBS disclosures.

Ideally Six Weeks in Advance:

- Give the Finance Team details of requirements for foreign currency. Agree collection arrangements.
- Arrange for a member of SLT to be the emergency contact.
- Arrange meeting with parents to brief them on all aspects of the trip, including:
 - the itinerary, including the meeting and collection points
 - contact details for the hotels/hostels
 - the number of the School mobile phone issued to the Group Organiser
 - the money, kit and equipment that the pupils need and the medical and visa requirements the expected standards of behaviour, and the potential risks of irresponsible behaviour and, for exchanges, the ground rules for behaviour in host families' houses
 - the ground rules on consumption of alcohol, tobacco and illegal substances, abiding by schools' Pupil Code of Conduct
 - ask pupils and parents to sign the Behavioural Contract and remind parents that those pupils who ignore or flout this risk being sent home at their parents' expense. Pupils remain subject to school rules and policies throughout the visit
 - arrangements for handling illness and accidents, and arrangements for informing parents in such circumstances
 - arrangements for communicating with parents in the event that the return is delayed
 - the need to notify the school in the event of contact with an infectious disease within four weeks of travelling
 - the reasons why a completed consent form is essential - the need for collection in advance of each pupils' passport.

It is recognised that not all parents will be able to attend such meetings; all relevant information should be sent to parents by letter/e-mail.

- If appropriate, book packed meals from Catering Department.
- Book travelling first aid kit from the school nurse.

Two Weeks in Advance:

- Chase parents who have not returned their consent forms. Remind them that their daughter/son cannot participate unless the form is received a week prior to departure.
- Check all tickets for accuracy. Store them in the School safe until collection. □
- Collect foreign currency ordered by the Finance Team.
- Meet with the other members of staff to discuss the itinerary, the risk assessment, the respective roles of the Group Organiser and other accompanying staff, and emergency procedures.
- Brief pupils on expectations of standards of behaviour and cultural differences.
- Prepare packs for the Head, EVC, SLT Emergency Contact, Reception and a digital copy for each member of staff, that contain the following information:
 - the itinerary (including address, phone numbers etc. of all locations where the party is staying)
 - the Group Leader's mobile number/School mobile
 - mobile numbers of participating staff
 - a list of pupils on the trip, together with copies of their parental contact forms (which includes details of each pupils' date of birth and any dietary/medical conditions)
 - copies of all passports and details of travel arrangements and emergency contact details for the travel company
 - emergency contact numbers for the SLT designated to be on-call
- copies of all risk assessment.
- Arrange meetings with the School Nurse and Heads of House to get advice on the individual pupils on the trip, and arrange for a safeguarding briefing with the DSL
- Arrange a meeting with the EVC to check all final arrangements.

By the Day Prior to Departure:

- Collect tickets, passports and foreign currency from the Finance team.
- Give trip information packs to designated school recipients and to other staff participants.
- Give each pupil the names, addresses and phone numbers of their accommodation.
- Remind pupils about the rendezvous, dress code, standards of behaviour etc.
- Remind pupils of the potential risks of irresponsible behaviour.
- Collect travelling first aid kit(s) and check contents.
- Collect pre-ordered meals.
- Collect School mobile and charger.

During the Visit or Activity:

- On departure, confirm the list of trip participants with Reception via the EVOLVE go app.
- Check that those pupils who require asthma inhalers/epipens/individual medication are carrying what they require.
- Primary responsibility for the safe conduct of the visit rests with the Group Organiser. He or she has sole responsibility for amending the itinerary in the event of unforeseen delay or sudden deterioration in weather conditions. If necessary, the Group Organiser should phone the School for advice from the Head, SLT Emergency Contact, EVC or DFO.

- The Group Leader may delegate part or all of the responsibility for the following to accompanying members of staff:
 - Carrying out a head count on getting on and off each form of transport, entering or leaving a museum, restaurant, activity centre, hotel etc.
 - Checking that all pupils wear their seat belts.
 - Checking the fire exits and escape routes at each hotel or hostel. Ensuring that every pupil walks through the emergency escape route at each hotel.
 - Ensuring that sleeping accommodation is suitable and located together (preferably not on the ground floor).
 - Sending messages for pupils to be in their rooms at night and conducting checks, making use of other staff.
 - Collecting pupils' mobile numbers and providing all pupils with the number of the Group Leader's or School's mobile.
 - Sending agreed messages and locations for checking pupils when they work or are allowed out unsupervised in small groups.
 - Enforcing expected standards of behaviour.
 - Looking after, or reminding pupils to look after, passports and valuables.
 - Storing cash and tickets in the hotel safe.
 - Keeping an account of all expenditure; receipts must always be kept.
 - Recording all accidents and near misses.
 - Keeping a record of all medication issued or first aid given to pupils.

Illness or Minor Accidents:

- If a pupil has a minor accident or becomes ill, the Group Organiser, or another member of staff will take them to the local hospital or clinic.
- If the trip is outside the UK, he or she will notify the insurers on their helpline to arrange (where possible) for the medical bill to be sent directly to the insurance company for settlement.
- If the accident is more serious (such as a broken leg when skiing), the School's medical insurers may arrange for the pupil, accompanied by a member of staff to be repatriated to the UK.
- At Merchant Taylors' School we expect the Group Organiser to phone the pupil's parents if their child has suffered an accident or injury that is serious enough to require medical treatment – as opposed to minor cuts and bruises.
- In the case of more serious accidents, the Group Organiser should contact the SLT Emergency Contact, the Head, or EVC.

Emergency Procedures:

- In the event of a serious accident resulting in the death or injury of one or more of the pupils and staff, the Group Leader's first priority would be to summon the emergency services, and to arrange for medical attention for the injured. One of the accompanying members of staff should accompany the injured pupil(s) to hospital.
- Ensuring that the rest of the group were safe and looked after, and informing the Head (or DFO, EVC or Emergency SLT Contact) of what had happened would be the next task for the Group Organiser, who would need to give as full, calm and factual account of the circumstances as permitted.

- Where the full facts had not yet emerged, he or she should say so, and ensure that follow-up communications with the Head (or DFO, EVC or Emergency SLT Contact) are maintained.
- He or she would also need to arrange (perhaps using the Deputy Trip Organiser or another member of staff) for the School's insurers to be contacted as quickly as possible, together with the British Consul, if the accident happened overseas.
- A full record should be kept of the incident, the injuries and of the actions taken.
- At Merchant Taylors' School, depending on the nature of the incident, we may implement our own emergency communications plan for informing as swiftly as possible both the families of the injured, and the families of those who are unhurt. We recognise that in an era of instant communications, it may not be possible for us to be the first to break the news. Nevertheless, we firmly believe that we have an important duty to speak personally to the parents of any pupil who has suffered some injury or mishap. We will use mass communication methods (SMS, email, Clarion Call, messages on our website, local radio) for communicating with those whose children are not affected.
- In order to limit unnecessary communication, at the outset of the trip, students should be briefed that in any accident or emergency situation, they must not use their phone to take any photos, nor must they post any messages on social networking sites/internet media. Staff will follow emergency plan procedures and students must wait until they have permission from staff who are managing the situation to send any texts/make any calls home.
- Where possible, communication with the media should be led by the Head and/or Marketing Department. The Group Organiser should refer the media to the School. If comment is unavoidable, it should be factual, calm and no attempt made to cover gaps in knowledge. Pupils should be discouraged from talking to the media.

As an employer, Merchant Taylors' Schools is committed to providing emergency planning procedures in the event of a critical incident. Refer to NG document: 4.1 [Critical Incident Management for Visits](#) and the Merchant Taylors' Schools Disaster Recovery Plan.

Procedure if a pupil goes missing:

- An immediate head count should be carried out by the Group Organiser in order to ensure that all the other pupils are present.
- Attempts should be made to contact the missing pupil by mobile phone.
- Another adult should search the immediate vicinity and any other obvious areas depending on location of the trip.
- The remaining pupils should be taken back to school or the accommodation/trip venue.
- The Group Leader should contact the senior staff on duty at the school by mobile phone.
- The Head should be informed; the pupil's parents should be phoned and told what has happened, and what steps have been set in motion.
- The Police should be informed.
- The Designated Safeguarding Lead should inform the Local Children Safeguarding Board.
- Once a pupil has been located, arrangements for getting them back to school should be made.
- On return, a full investigation should take place with follow-up as appropriate. A written report must be made and a copy placed in the main school file. Any sanctions taken should also be recorded.

Delayed Return:

- If a visit is delayed, the Group Leader should phone the SLT member on call or the School Office, who will in turn phone all the parents on their contact numbers to alert them to the delay and the revised time of arrival or alternatively send an SMS/Email to parents via EVOLVE.

On Return:

- Each Group Leader must provide the EVC with a trip evaluation, completed on Evolve. Details of any unplanned incidents or observations, reports of accidents and near misses or safeguarding issues should be provided. Personal observations and lessons learned are always valuable. The Group leader should return all School property and should also:
- Instruct all pupils to delete their records of the School mobile and of any staff mobiles.
- Remind all members of staff to delete any records of pupils' mobile numbers that they may have acquired during the visit. NB pupil mobile numbers can only be collected with advance notification to the Executive Team, and with parental consent. Pupil numbers must only be used for the reasons given when consent was sought.
- The Group Leader is responsible for returning any unused cash to the Finance team. Foreign currency card should be returned, together with all related transaction vouchers. The Group Leader is also responsible for producing a schedule of all expenditure on the trip; this includes production of all receipts. Unused balances will be returned to the parents by way of credits shown on the next school bill.
- The group leader will return any hard copies of data to the school office for shredding. All digital data packs will be deleted.

C: Reports for Governors

Reports to the Governors always contains a synopsis of all the School trips and visits that have taken place since the last report. These reports should happen at least once per year. Group Leaders should give the EVC information regarding the trip so it can be included in any report written.