

# St Olave's Grammar School



## SCHOOL JOURNEYS, EDUCATIONAL VISITS & ACTIVITIES POLICY

The School and Governing Body recognise the benefits gained by students taking part in school journeys, educational visits and activities. In particular, it is understood that such activities provide opportunities for students to undergo experiences not readily available within the classroom.

- **School Journey** – defined as an off-site activity that requires an overnight stay and takes place out of school hours.
- **Educational Visit** – defined as an off-site activity that does not require an overnight stay, is within school hours or is a requirement of the curriculum.
- **Activity** – defined as an event that has been arranged in-house and remains on site or a sporting activity either on or off site

**Note: Regular sporting fixture or events and other activities such as chess matches follow a different procedure. Risk assessments for each sport and activity are held by the school and there is an expectation that student required for an on or off site fixture would be available to represent the school and would notify parents/carers of the details of the fixtures as advised by the member staff in charge.**

School journeys, educational visits and activities (hereafter referred to as 'trips') are subject to a range of laws and staff should be clear about their responsibilities. Members of staff intending to organise a trip are required to read and follow this policy. They are directed additionally to read the official guidance 'Advice on legal duties and powers' (DfE<sup>1</sup>, 2012) and 'School trips and outdoor learning activities' (HSE<sup>2</sup>, 2011), both of which concern the legal duties relating to school trips.

### Planning a trip

There must always be one member of staff appointed as **Group Leader** to have overall responsibility for the supervision and conduct of the trip and have proper regard for the health and safety of the group. He or she will normally have experience of accompanying school trips before taking on the role of Group Leader but further training and advice from the **Educational Visits Co-ordinator** (EVC) will be available on request.

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<sup>1</sup> <http://tinyurl.com/6q43rdm>

<sup>2</sup> <http://tinyurl.com/7n9sps2>

The planning process has four stages:

- 1) Obtain 'agreement in principle' from the EVC that the trip can occur at the time proposed.
- 2) Gather further information and complete all necessary documentation for the trip
- 3) Obtain approval of the budget from the Finance Office
- 4) Formal approval for the activity is given and the event is placed in the school calendar

On the pages below we consider each stage in turn.

### **1) Obtain 'agreement in principle' from the Educational Visits Co-ordinator (EVC).**

This should include an outline of the aims and objectives of the activity and evidence that it forms part of the school's development and aims of the curriculum. Dates of departure and return, details of the students likely to be involved and potential staffing levels will be required as a minimum.

It should be noted that the 'agreement in principle' is not the formalised agreement that the trip can take place. At this stage, should the Group Leader wish to find out if there is sufficient interest to make the trip viable, they may send a letter to the parents advertising their intention to run the trip. However, no money should be collected at this stage.

### **2) Gather further information and complete all necessary documentation for the trip.**

The Group Leader will need to complete an **Educational Visit Application Form**<sup>3</sup> and create a budget for the trip, paying particular attention to the terms and conditions of sale of any organisation to be used; for example, charges that may be applied in the event of a cancellation.

When creating the budget the Group Leader should ensure that:

- All costs relating to travel, including minibus hire if applicable, are included in the budget and that written quotations and other relevant documentation are provided as necessary.
  - Please note that all international residential trips should be run through a tour operator. If this proves problematic the Group Leader must draw this to the attention of the EVC immediately. The SLT will then consider each trip on its individual merits before deciding whether to allow it to proceed.
- Full details and costing of any proposed excursions and incidental expenses are included.
- Provision has been made for the cost of insurance.
  - If the Group Leader wishes to use an Insurer other than the School's Insurer they must first obtain the agreement of the School Business Manager.
- Additional expenses, such as duty lunches for staff, cover costs and photocopying are included in the budget as such items cannot be added at a later stage.

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<sup>3</sup> A copy of the Educational Visit Form is included as Appendix A

- The budget is such that the activity will be cost-neutral to the school.

A **risk assessment**<sup>4</sup> must be carried out as part of the planning process. Such assessments will vary in detail from activity to activity, with higher-risk activities requiring more careful consideration, **such as students swimming in a swimming pool, lake or the sea**. Risk assessment and risk management is not intended to be an onerous process: it should focus on real risks and not risks that are trivial or fanciful. The HSE guide 'Five steps to risk assessment' (HSE<sup>5</sup>, 2011) provides a useful framework for considering the risks inherent in an activity.

### 3) Obtain approval of the budget from the Finance Office

The Group Leader should draft **letters**<sup>6</sup> to be sent to parents. In addition to informing parents of the details of the trip, the letter should also clearly explain the cost of the proposed activity. The school may charge for some costs but not others; therefore, voluntary contributions may need to be sought from parents. No student can face discrimination if their parents decline to contribute and so it must be made clear what will happen to the trip if insufficient contributions are received.

The School may charge for activities that are deemed to be **optional extras**. Optional extras are defined as:

- Board and lodging for a pupil on a residential visit.
- Education provided outside of school time that is not (a) part of the National Curriculum; (b) part of a prescribed public examination that the pupil is being prepared for at the school; or (c) part of religious education.

For example, the School can charge parents the full cost of a sports tour that occurs during a school holiday but could not charge for costs associated with a fixture within the school day. The School may charge for the costs associated with an evening trip to the theatre but not if students are watching the play as a requirement of their studies for an examination, even if such an activity fell outside of the normal school day. The School may charge for the board and lodging associated with a residential fieldtrip but, as the activity relates directly to the qualification being studied, could not charge for other costs. The school may however request voluntary contributions to cover costs in all situations where it cannot levy a charge.

Costs should be broken down into costs for which a charge can be made (**chargeable costs**) and those that cannot (**voluntary costs**); so that it is clear to the parents which charges are optional. Any chargeable costs must not exceed the actual per pupil cost of providing the optional extra activity, divided equally by the number of pupils participating. No element of subsidy can exist in the chargeable element in respect of other

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<sup>4</sup> A generic risk assessment is included as Appendix B.

<sup>5</sup> <http://tinyurl.com/n3kmp2>

<sup>6</sup> Exemplar included as Appendix C

pupils whose families are unable to meet the full costs involved. The Group Leader must ensure in the documentation sent home that individuals who may find themselves in this position know how to apply for financial support from the school.

For some students the chargeable cost will be remitted completely. Specifically, students whose parents are receiving: Income Support; Income-based Jobseeker's Allowance; Support under part VI of the immigration and Asylum Act 1999; Child Tax Credit (providing that they do not also receive Working Tax Credit and have an annual income, assessed by the Inland Revenue that does not exceed £16,190 FY 2012/13) and an income related employment and support allowance or the guarantee element of State Pension Credit.

Since April 2003 the eligibility criteria that entitle families to an exemption from paying for the cost of board and lodging on residential visits have been aligned with free school meals eligibility criteria. All parents have the right to claim free board and lodging if they are receiving these benefits.

It is permissible to request a voluntary contribution for more than the minimum amount, in order to subsidise those pupils whose parents are not able to contribute to the optional charge. However, when creating such a contingency staff should bear in mind that all trips are intended to be cost-neutral to the school and, therefore, non-profit making. Our objective is to manage the financial impact of running educational visits on other areas of the curriculum. We do not wish to generate profits from running activities nor do we wish to generate large surpluses on trips.

School policy is that in the event of a surplus remaining at the end of the trip, amounts under £20 will not be refunded. The retained surplus remains in the School Voluntary Fund for the benefit of the whole school and to cover any administration costs. Amounts in excess of £40 per student will always be refunded. Amounts between £20 and £40 per student will be refunded if this amount represents at least 10% of the cost of the activity.

If due to unforeseen circumstances a deficit is incurred on a trip, a full explanation of the reason for this must be given in writing by the Group Leader. The position will be referred to the Headmaster who will decide the course of action required. This may include:

- Asking the parents for a further contribution.
- Requesting additional fund raising.
- Charging to the BSE of the appropriate department (for curriculum activities only).
- Agree to write off the balance to the 'School Voluntary Fund' (for curriculum activities only).
- A combination of the above.

Parental agreement to meet the costs of a trip should be obtained before making bookings and other financial commitments. For expensive trips, payments by instalments may be appropriate on the understanding that all payments are made in full prior to the date of the trip. If deposits are being paid to a supplier or organisation, it should be explained to the parents whether their deposit is refundable or not.

The School's preferred method of payment is the on-line system (sQuid). It is crucial that the Finance office be made aware of a Group Leader's intention to request payment by this mechanism before the letters<sup>7</sup> are sent out to ensure that problems in paying are not encountered by parents.

Due to financial regulations, staff should note that students must be responsible for their own pocket money and that cash floats and foreign currency will not be issued to staff. Staff expenses should be anticipated in the budget and evidenced by receipts when claiming payment on return to school. Please note that monies can only be refunded to the individual who incurred the cost and that staff expenses cannot include claims for purchases of alcoholic drinks.

Once complete, the Group Leader should submit the documentation to the Finance Office, where JW will agree the budget, record that a risk assessment has been completed and make arrangements to receive the payments from parents.

#### **4) Formal approval for the activity is given and the event is placed in the school calendar**

Once formal approval has been given the Group Leader may approach parents to **request payment** or voluntary contributions towards the costs. When in a position to do so, the Group Leader may also instruct the Finance Department to pay deposits to any third-party, if so required. The Finance Department will maintain a record of payments and provide this to the Group Leader on request.

Activities occurring within the school day and on the school site do not require written parental permission. Neither do activities that form part of the school's regular curricular or extra-curricular commitment. It is required however to ensure that **written parental permission** is sought whenever the students are being taken off-site on a trip that occurs annually or at irregular intervals. This can form part of the initial mailing<sup>8</sup> and the Trips Administrator will collate these responses on behalf of the Group Leader.

All residential trips should have a **Parents' Briefing** before departure. This provides an opportunity for the Group Leader to provide more details on the activity and establish expectations for the trip. It is required that the Group Leader ask the parents and the student to sign a document explaining the **rules and**

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<sup>7</sup> A pro forma letter, which assumes payment by sQuid, is included as Appendix C.

<sup>8</sup> As shown in pro forma letter in Appendix C

**regulations**<sup>9</sup> of the trip and to collect updated **medical and contact information**<sup>10</sup>. The information on SIMS may not include very recent medical developments and, if the trip is occurring during a school holiday, the normal parental contact details may not be applicable. For international residential trips, Group Leaders may wish to ask parents to provide written permission<sup>11</sup> before departure to expedite the re-issuing of a passport should a student happen to lose theirs en-route. For activities that involve multiple overnight trips (e.g. World Challenge and Duke of Edinburgh award) there may be one Parents Briefing to cover all overnight activities. This must take place prior to the first overnight activity occurring.

Group Leaders have a responsibility to be aware of students on the vulnerable children and monitoring list. The procedure for this is outlined below:

1. On booking a trip the Trips and Visits coordinator will check any students against these lists and inform the Child Protection team and the Group Leader of names. The Child Protection team will then discuss any relevant issues with the Group Leader.
2. One month prior to any trip the Group Leader must check the vulnerable children and monitoring list and highlight any names with the Child Protection team. This process must also be repeated one week before departure.
3. As a result of the above the Child Protection team has the right to expect an individual risk assessment to be produced by the Group Leader for any students highlighted. This will be completed in consultation with the Child Protection team and may or may not involve parents again at the discretion of the Child Protection team.

On returning from the trip the Group Leader should ensure that all expense claims are presented promptly to the Finance Department in order to allow the trip account to be closed as soon as possible. The trip should then be reviewed and the risk assessment amended, if necessary, in light of experiences and in preparation for the next trip.

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<sup>9</sup> An exemplar is included as Appendix D

<sup>10</sup> Exemplar included as Appendix E

<sup>11</sup> Guidance provided in Appendix F



# Appendix A

## Educational Visit Application Form

### St Olave's Grammar School

Name of trip:	
Name of Group Leader(s):	
Destination & purpose:	

#### Dates and timings

Date of departure:		Location & time:	
Date of return:		Location & time:	

#### Details of participants

Number of students:		Year group(s):	
Number of boys:		Number of girls:	
Other adult leaders: (including relevant experience & qualifications)	1.	5.	
	2.	6.	
	3.	7.	
	4.	8.	
adult / student ratio:			

#### Transport details

Mode of transport:	
Other details:	

#### Accommodation details

Address:	
Emergency contact details:	

#### Insurance details (if not the School's policy) NB the suitability of any such policy **must** be agreed by ADW

Insurer:		Contact:	
Policy number:		Telephone:	
Address:			

#### Tour operator NB all international residential trips **must** be organised through a tour operator

Name of operator:		Contact:	
Address:		Email:	
		Telephone:	
		Fax:	

Visit agreed in principle by: ..... Date: .....

**JBD**, Educational Visits Coordinator

The overriding aim of budgeting is to ensure that the activity is affordable to the students and cost-neutral to the school. The following breakdown assumes that the trip is an essential part of the curriculum, as such it will consist of two elements: a **chargeable element** that refers to the board and lodgings cost of a residential trip, if relevant, and a **voluntary element** that covers everything else. Charges for non-residential curriculum trips are entirely voluntary.

**NB if the trip occurs outside of school hours and is not part of the curriculum then all costs become chargeable.**

**Chargeable costs**

Total cost of board and lodgings	£
Number of pupils	
<b>Chargeable cost per pupil</b>	<b>£</b>

**Voluntary costs**

Total cost of travel (including minibus hire, if applicable, at £80 per day or £40 per half day)	
Total cost of excursions	
Total cost of insurance (applicable to residential trips only at £10 per student)	
Additional expenses (if applicable):	
Duty lunches (£11 per meal per member of staff)	
Teaching staff cover (£80 per day or £40 per half day)	
Photocopying	
Other (please specify)	
<b>Subtotal</b>	
Contingency charge (up to 10% of subtotal)	
<b>Total voluntary cost</b>	
Number of pupils	
<b>Voluntary cost per pupil</b>	<b>£</b>

<b>TOTAL COST per pupil</b>	<b>£</b>
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In the event of a surplus remaining at the end of the trip, amounts under £10 per student will not be refunded. Amounts in excess of £20 per student will always be refunded. Amounts between £10 and £20 per student will be refunded if this amount represents at least 10% of the cost of the activity.

Documentation approved by: ..... Date:.....  
**JW, Finance Office**

**Checklist:**

1. Obtain **agreement in principle** from the **Educational Visits Coordinator**, AJR, that the trip can occur at the time proposed.
2. Complete the **Educational Visit Application Form** with help from the **Trips Administrator**, JW.
  - o Ensure that you obtain all financial quotations in writing before completing the budget.
  - o Complete a full risk assessment of the proposed activity.
  - o Draft letter(s) to be sent to parents, including payment instructions and deadlines.
3. Submit the documentation to the **Finance Office**, where JW will agree the budget, record that a risk assessment has been completed and make arrangements to receive the payments from parents.
4. The **Educational Visits Coordinator**, AJR, will then give **formal approval** and enter the trip into the whole-school calendar.
5. The **Trips Administrator**, JW, will oversee the collation of reply slips, coordinate booking arrangements and ensure that a detailed itinerary is produced for the trip.

I confirm that I read the **School journeys, educational visits and activities policy** and completed all aspects of the checklist given above. I will ensure that a list of participants is advertised on the CRNB well in advance of the trip.

Group Leader(s): ..... Date: .....



## Appendix B

### Generic Risk Assessment



**Saint Olave's Grammar School**

**School Trip:**

**Generic Risk Assessment**

**Dates:**

<b>The Hazard</b>	<b>The Risk</b>	<b>Level</b>	<b>Control Measure</b>	<b>Additional Action</b>	<b>Review</b>
Previous medical condition	Recurrence of condition leading to illness/injury/death	<b>Med</b>	Medical consent forms completed by parents and carried on journey. Medication carried by individual.	Doctor/medical treatment	Incident form completed. Review of procedures
Illness/injury to supervisor	Lack of group supervision due to incapacitated leader	<b>Med</b>	Adequate ratio of adults to students, and of the appropriate sex if on a residential	Activity postponed until further support available	Incident form completed. Staffing reviewed
Illness/injury to pupil	Accident resulting in injury	<b>Med</b>	Group are briefed with before activities. A first aid kit is available.	One of the supervisors is a first aider, for adventurous outdoor activities	Incident report form and review of events
Age/character of participants	Misbehaving, rule breaking	<b>Med</b>	Clear rules and boundaries established. Correct ratio of adults to pupils.	Contingency plan for returning pupil home if necessary	Review of procedures and paperwork
Location/venue of activity	Emergency or accident resulting in injury/death	<b>Med</b>	Follow the rules of the premises and course provider. Carry out head count and group check	Check emergency exits are operational in a residential setting	Review suitability of course provider
Competency of supervisory staff	Inadequate staff, inexperienced leaders	<b>Med</b>	Correct ratio of adults to pupils for the activity session. Adult leaders are suitably qualified for the activity	Activity is stopped if not sufficient competent leaders	Review and amend plans
Transport – entry/exit from vehicle	Injury/death due to lack of road awareness and safety	<b>Med</b>	Manage groups on entry/ exit to vehicle, brief on awareness of other road users, particularly in car parks	Ensure parking area has a safe point for embarkation	Review and amend plans

<b>The Hazard</b>	<b>The Risk</b>	<b>Level</b>	<b>Control Measure</b>	<b>Additional Action</b>	<b>Review</b>
Transport – minibus/coach accident	Injury/death	<b>Med</b>	Brief passengers to wear seatbelts. Ensure that staffs undertake a minibus driving course. Bus carries a first aid kit.	Contact emergency services	Incident report form and review plans
Transport – minibus breakdown	Stranded group on roadside, could lead to possible injury or death	<b>Med</b>	Use road worthy vehicles, exits of vehicles to be kept clear. Drivers have a mobile and breakdown contact.	Evacuate vehicle and stand well back from road and van	Incident report form and review procedures
Public Transport – train travel	Group separated or stranded	<b>Med</b>	Brief group of destination and meeting point. Manage entry and exit from train	Group members to have contact number	Review plans
Public Transport – bus travel	Group separated or stranded	<b>Med</b>	Brief group of destination and meeting point. Manage entry and exit from train	Group members to have contact number	Review plans
The public	Assault, abuse, abduction	<b>Low</b>	Use group checks regularly (head counts), appropriate supervision ratio	Involve the police where necessary	Incident report form and re-evaluate plans
The weather	Exposure, hypothermia, sunburn, heat exhaustion	<b>Med</b>	Brief on suitable kit and equipment for activity.	Use first aid person and emergency services when needed	Review planning

Written by: .....

Date: .....

**Appendix C**

Exemplar letter requesting voluntary donations

**Date**

Dear Parent/Carer

**Trip name**

**Paragraph explaining what trip is about**

A voluntary contribution of £ is requested towards the cost of the event. If we do not receive enough voluntary contributions to make the educational visit possible other sources of funding are not available and, as such, we may be forced to cancel the event. Should you find yourself in financial difficulties, please apply to the Headmaster in writing and your application for support will be considered, in the strictest confidence.

If you would like your son to participate in this visit please sign the form below and return it to the Finance Office (Room 12) via the student post box/your subject tutor by date. Payment should be made via our on-line system (sQuid). Should you experience any problems in connection with the on-line system, please do not hesitate to contact the Finance Department by telephone (01689 820101 x 164 or 143) or email [financeoffice@saintolaves.net](mailto:financeoffice@saintolaves.net) and we will assist with your query. **IMPORTANT: we shall be taking contact and medical information from the school-held records, so if you believe any of that information to be incomplete or not up-to-date, please supply any additional details on the form below.**

If you have any queries relating to this trip please do not hesitate to contact me.

Yours faithfully,

**Name**

☞.....

I give permission for my son/daughter to attend the ..... trip on date.

Name ..... Form .....

Signed ..... Date .....

Additional medical details .....

## Appendix D

### Exemplar rules and regulations

- Each student should at all times by their bearing and conduct seek to add to and not detract from the good name of both the travelling group and the School.
- The standard of behaviour should be exemplary at all times, based on common sense and an appreciation of what is meant by 'acceptable' conduct. Behaviour on a school trip should be no different from that expected of students whilst at school.
- Members of the party may go off unescorted at times, after securing the agreement of a member of staff, but must always maintain a minimum of three students in any group. Whenever possible, a member of staff should be informed of the group's proposed destination and expected time of return.
- Students must not enter a swimming pool or the sea without the permission and subsequent supervision of a suitably qualified member of staff.
- Smoking or the consumption of alcohol is not allowed at any time during the trip, regardless of the laws in operation locally. No illegal drugs may be present at any activity taking place under the aegis of the school. Any student breaking this rule faces permanent exclusion from the school.
- Knives, laser pens or other inappropriate materials should not be taken on a school trip. The exception to this is when pocket knives or Swiss Army knives are specifically and explicitly recommended in writing by the trip leader e.g. on World Challenge or Duke of Edinburgh. Any student breaking this rule may also face further punishment on return to school.
- The purchase of knives, laser pens or other inappropriate materials is forbidden, regardless of the laws in operation locally. Such items will be confiscated and disposed of by a member of staff without recompense to the purchaser. Any student breaking this rule may also face further punishment on return to school.
- Students may need to be registered in the accommodation at certain times decided by the staff. All such curfew times must be strictly adhered to, as must any 'lights out' request. Students are not to enter the rooms of other students nor are they to permit other students to enter their room.
- The occupants of each room are held responsible for that room, which must be kept tidy. Any prior damage or defects in furnishings should be reported at once to a member of staff when entering the room, since all damage must be paid for by the occupants on departure.
- Parents are asked to give written notification of any known medical condition affecting their son/daughter or of any medicine(s) that may be required by son/daughter. Any illness or injury during the trip must be reported to a member of staff promptly.

- Behaviour or conduct which falls below the highest standards is unacceptable and may result in a member of the group being sent home prematurely, with all associated costs passed on to the parents of that student.

I have read the rules and regulations and agree to the above.

Student: .....

Parent(s) /Carer: .....

Date: .....

**Appendix E**

Exemplar Medical Information Form



**St. Olave's Grammar School - Medical Information Form**

**1. Student details**

Student's full name: .....

Form: ..... DOB: .....

**2. Student's health service details**

Name of family doctor: ..... Tel: .....

Address: .....

.....

**3. Medical information – Please fill in this section even if you believe that the School already has this information.**

a) Does your child suffer from any condition requiring medical treatment, including medication? YES / NO

If YES, Please provide brief details including emergency procedures, the type of medication your child may be given and what medication (e.g. Epipen) he/she will need with him/her. Students are permitted to carry one Epipen and/or one asthma pump with them. Any spares should be handed to the supervising member of staff at the beginning of the trip. Please note that it is the responsibility of parent/guardian to ensure that their child has the necessary medicine with him/her.

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.....

.....

c) Date of tetanus injection .....

b) Does your child suffer from any allergies? YES / NO

If YES, please provide brief details.

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.....

.....

**4. Dietary requirements**

Does your child have any special dietary requirements? (e.g. vegetarian) YES / NO

If YES. Please provide brief details below.

.....

.....

.....

**5. Emergency contact details**

Contact telephone numbers of **parents / carer**

**First contact name:** .....

Work: ..... Mobile: .....

Home address and telephone:

.....  
.....

**Second contact name:** .....

Work: ..... Mobile: .....

Home address and telephone (if different from above):

.....  
.....

**Alternative emergency contact:**

Name: ..... Tel number: .....

Address: .....

.....

**6. Consent**

**I consent to my child taking part in the .**

**If a situation arises where a student has a serious accident every effort will be made to contact the parent/carer. In the event of an emergency, any decisions on treatment will be taken by the medical professionals.**

I agree to my child receiving medication as instructed and any emergency dental, medical or surgical treatment, including anesthetic or blood transfusion, as considered necessary by the medical authorities present.

*I will inform the Trip Leader as soon as possible of any changes in medical or other circumstances between now and the commencement of the trip.*

Signed: ..... Date: .....

Full name: .....

## **Appendix F**

### Guidance concerning a lost passport

For an overseas trip it is advisable to take a pack of the following information for each student (preferably in a folder with clear pages):

- A photocopy of the back page of both parents' (or guardians') passports.
- A photocopy of the back page of the child's passport.
- Two passport size photographs of the child.
- A letter of consent, signed by the parents (or guardians), to the issuing of an emergency passport. The wording should be as follows:

"We give our consent for an emergency passport to be issued to .... (name).....in the event of his/her original passport being lost."