



Joseph Swan Academy

Visits Policy

2018 – 2019

To be reviewed September 2019

Visits Policy

At Joseph Swan Academy, we aim to offer our students a broad and balanced curriculum that promotes their spiritual, moral, cultural, social and physical development and prepares them well for the next steps of their educational journey and future adult life. The Academy's Head Teacher and governors recognise the value and importance of learning outside the classroom and encourage staff to organise educational visits that promote deeper learning, enrich the curriculum and enhance the learning experience and development of our pupils.

All offsite visits and activities that are organised and undertaken by the school are regarded as "educational visits". This excludes work experience, college & WRL placements which are dealt with separately. Whenever pupils leave the school site under the direct or indirect supervision of school staff, they are undertaking an educational visit.

The prime responsibility of all leaders and staff on educational visits undertaken on behalf of Joseph Swan Academy is to ensure the Health and Safety of all participants (staff, students and volunteers) as well as the general public as they come into contact with the visit and its participants. Underpinning this responsibility is the need for excellent planning and careful risk assessment prior to the visit taking place.

Key staff involved in the approval and monitoring of educational visits

Head Teacher

'Head designate' (for the purposes of Educational Visit Approval)

Educational Visits Coordinator (EVC)

Business Development Manager

Attendance Officer

Gateshead LA Educational Visits Consultant (retained on annual contract by JSA)

Types of Educational Visit

Level 1 visits – All visits not deemed to be level 2 visits

Level 2 visits - Higher risk visits, defined as: Residential visits; Visits outside the UK; Visits which involve adventurous or other higher-risk activities; Visits to remote or hazardous locations

Educational Visit Procedures followed at Joseph Swan Academy

Notes

- Documents referred to and marked with an * are to be found in full or as templates on the School Staff VLE at staffroom / school documents / school visits.
- Checking and approval of all visit related letters by the Head Teacher before sending to parents / carers is required.

Visit Planning

- a) Visit organisers must check the planned date(s) against the school calendar to avoid clashes with other events and activities.
- b) All Level 2 visits i.e. adventurous, overseas, residential visit and visits to remote locations should first be discussed with the EVC.

- c) Visit leaders are encouraged to gauge initial interest in an overseas / residential visit or visit with significant cost in a letter to parents / carers
- d) If there is a significant financial aspect to the visit, funding and financial planning and arrangements must be confirmed with the budget holder or Business Development Manager before proceeding further.
- e) Visit organisers must ensure there is sufficient time to gain visit approval and to plan and execute all organisational matters pertaining to the visit. The time needed for this will vary from visit to visit. If in doubt the visit organiser should consult with the EVC.
- f) Provisional bookings may be made but it must be made clear that such a booking is provisional and the visit is subject to approval before it can be confirmed. NO financial commitment should be made until the visit and financial arrangements are approved.
- g) There is a presumption of entitlement to participate. All effort should be made to plan visits that are accessible to all students. Adaptations and controls should be planned in to a visit where necessary, reasonable and realistic to enable participation by all. The visit risk assessment* should always record such arrangements.

Visit approval procedures

- a) The visit organiser should complete a visit proposal form and submit this in hard copy to the EVC or BM at the earliest opportunity. Submission of the visit proposal form will normally be no less than 2 working weeks ahead of the visit in the case of Level 1 visits and no less than 8 working weeks ahead in the case of level 2 visits. The visit proposal must be accompanied by completed pink 'Staff request for time out of the Academy' forms.
- b) Regular weekly meetings are held to discuss and consider visit proposals. Decisions regarding the approval of Level 1 visits are made in these weekly meetings. Level 2 visits are discussed at those meetings and, if approved, a recommendation for final approval made to the Head Teacher. The Head Teacher makes the final decision to approve Level 2 visits. Decisions are conveyed to the visit organiser by the BM and reasons will be given if visit approval is refused.
- c) All visits require a visit information letter to be sent to parents stating the purpose of the visit along with the practical arrangements being made. Letters must not be sent out until after the visit has been approved and the letter itself has been approved by the Head Teacher. A template letter to parents is provided in the Academy VLE School Visits folder.
- d) All visits require the use of the Academy's 'Visit Consent Form'. If providers demand that their own consent form be used, this should be completed in addition to the Academy 'Visit Consent form'. The template for the Academy's 'Visit Consent Form' is provided in the Academy VLE School Visits folder.
- e) A full risk assessment should be prepared by the visit leader. All staff / adults accompanying the visit should be made aware of the content of the risk assessment and, ideally, should be involved in writing it. The risk assessment must be specific to the visit concerned and is a critical document in terms of gaining full final approval for the visit. The template for the Academy's generic 'Educational Visit Risk Assessment' is provided in the Academy's VLE School Visits folder. This must always be reviewed and 'tailored' to the visit in question.
- f) Provider risk assessments should be obtained where appropriate. A provider form (EV2) should be sent to any external visit provider for completion except where the provider has a LOTC Quality Badge as this exempts them the need for an EV2 (holders can be found at <http://lotcqualitybadge.org.uk/search>). An EV2 is not generally required for level 1 visits.
- g) A visit register must be completed using information taken from returned consent forms. This visit register must be available to staff on the visit and also to the emergency contact person (if any part of the visit takes place 'out of hours'). During normal working hours the Attendance Officer will hold a copy of the visit register.
- h) The visit organiser should prepare and submit an EVOLVE form to the EVC for the final checking and approval of visit planning and arrangements. For level 1 visits, the EVOLVE form should be submitted no less than one full week before the visit is to take place; for level

2 visits, the EVOLVE form should be submitted no less than 5 full weeks before the visit is due to take place. This form must contain (as attachments) :-

- i. the full risk assessment document;
 - ii. an EV2 and other provider risk assessments (where needed);
 - iii. all information letters sent to parents/carers along with copies of any presentations used in parental information meetings;
 - iv. the consent form
 - v. a separate itinerary (if not included in the letter to parents)
 - vi. a full visit register (where practicable / if time allows - otherwise the visit register must always be available for inspection on departure).
- i) Level 2 visits are subject to further approval by the local authority Educational Visits Consultant. EVOLVE forms must be submitted to the Gateshead LA Educational Visits Consultant by the 'head designate' at least 4 weeks before the visit is due to depart.
 - j) Any concerns with the EVOLVE form will be communicated to the visit organiser and support given to enable successful re submission.
 - k) No visit should proceed without the full approval signified by successful processing of the EVOLVE form. Visit leaders will be advised should this be an issue.
 - l) Educational visits should be entered onto the school calendar as soon as possible by the EVC after approval.
 - m) Monitoring of visits may be undertaken by the EVC, ALT or by the Gateshead LA Educational Visits Consultant.

Visit and Post Visit procedures

- a) The visit organiser should collect and check all consent forms returned. Parental signatures not only signify consent but also act as 'receipts' for information letters received. Particular attention should be paid to medical and dietary information offered. Management of individual health, dietary and behaviour issues should form a key element of the visit risk assessment. Note – no student can be permitted to go on a visit without prior written consent from a parent or carer.
- b) The visit organiser / leader must share any information regarding risk assessment, student health issues or visit arrangements with visit staff / accompanying adults prior to departure.
- c) All visits must start and end at the Academy site.
- d) An updated visit register must be left with the Academy Attendance Officer on departure from the school or (in the event of an 'out of hours' departure) arrangements must be made for communication of that register to both the Academy Attendance Officer and the emergency contact person.
- e) The visit leader must carry a copy of the visit register with all emergency contact details during the visit. Visit staff must be aware where that information is at all times.
- f) The visit leader is responsible for on-going risk assessment and 'on the spot' management of the visit. Due regard must be given to changing circumstances (e.g. weather conditions) to ensure the safety of participants and the effective conduct of the visit. Even where external providers are leading activities the visit leader holds final responsibility for the management of risk and health and safety of the visit participants.
- g) A 'Plan B' may be appropriate for any activities that are weather dependent or may otherwise risk late change. Information regarding any 'Plan B' activities must be included in information provided to parents/carers and must also be included in the Visit Risk Assessment
- h) Any accidents or issues occurring during a visit must be reported promptly to the EVC and an entry completed in the Academy Accident Book if appropriate.
- i) On return, the visit organiser must complete an evaluation of the visit on the EVOLVE system
- j) A record of each visit and its documentation is retained on the EVOLVE system

Staffing of Educational Visits inc. student / teacher ratios

- a) Visit Leadership is a highly responsible role and due consideration will be given to the experience, training and qualifications of a visit leader at the visit approval stage. Whether the leader has appropriate experience, training and qualifications for the type of visit planned will be a key factor in gaining approval for the visit. Level 2 visits in particular will at least require leadership with previous experience of that type of visit in a supporting role.
- b) Staff training opportunities in visit management and leadership and, separately, in the EVOLVE process will be provided from time to time – either in house or through external providers. Educational visit policy and procedures should be part of the induction process for new staff.
- c) There should be a staff gender balance to reflect the gender balance of the participants wherever possible.
- d) Volunteers accompanying a visit must be recorded on the EVOLVE form. An enhanced DBS check is required for any volunteer accompanying residential visits or involved in any activity where they may be left unsupervised with participants. The competence of volunteers being allotted responsibilities during a visit must be assessed in advance and agreed by the Head Teacher.
- e) Staffing ratios will vary according to the nature of the visit and activities involved. It will also vary with the character of the participants e.g. special needs students may need one to one support on a visit. This aspect will be judged when approval for the visit is considered and must be referred to in the visit proposal document. Appropriate staffing ratios must be considered when submitting a visit proposal. As a rule of thumb student / teacher ratios will follow the pattern below...
 - i. Level 1 visits - 20 students maximum to each supervising member of staff
 - ii. Level 2 visits – 10 students to each supervising member of staff will be the ‘norm’ although lower student to staff ratios may well be demanded according to the nature of the visit and activities to be undertaken.

Risk Assessment and safety matters

- a) The health & safety of all participants (and of the general public) is the paramount concern of a visit leader and accompanying visit staff.
- b) Risk assessment is a vital precursor to a visit and helps to ensure the safety of participants. Essentially, it is a process of identifying potential hazards and planning control mechanisms to minimise those hazards. Risk assessment starts on departure and finishes when the visit has returned and all participants are safely discharged into the care of parents / carers or returned to lessons. A ‘step by step’ approach to risk assessment is recommended and must include ...
 - i. travel arrangements,
 - ii. arrangements for ‘initial registration’ and ‘final dismissal’ of participants
 - iii. activities to be undertaken
 - iv. arrangements for any students with special needs, health, dietary or behaviour issues
- c) Pre visit inspections are recommended to support the identification and assessment of risks but it is recognised that this is not always possible.
- d) Risk assessment is an on-going process and full attention should be paid by visit leaders and their staff to any changing circumstances that could potentially affect the health & safety of participants. Appropriate actions and necessary changes to plans must happen to alleviate undue risks to participants. ‘On the spot’ decision making may be required and a clear responsibility for this lies with the visit leader. Any such issues that arise should be reported to the EVC on return and, if an emergency situation, the Head Teacher, ‘head designate’ or EVC must be informed as soon as it is possible to do so.
- e) Involving students in risk assessment and management is appropriate and encouraged where appropriate as part of the learning benefit of educational visits.

Travel arrangements

- a) All visits must start and finish at the Academy site.
- b) Any transport bookings should be made through the Academy Finance office (in the case of hired transport being used) or through the Academy Administration team (in the case of school minibus being used). This should ensure the use of safe vehicles and qualified drivers.
- c) Visit leaders must ensure that risk assessment of travel arrangements is included in the overall visit risk assessment.
- d) There is a procedure for staff to allow use of their own vehicles on educational visits. This should only be done as a last resort solution to a transport issue. Drivers must hold and register business insurance with the Academy Administration team. An 'own car use' form must be completed and attached to the visit EVOLVE form.

Emergency procedures and critical incidents

- a) All visits must have at least one emergency contact. During normal school working hours the emergency contact is the Head Teacher or the Head Designate via Academy reception. For visits that extend into periods that are 'out of hours' a named emergency contact must be identified on the EVOLVE form. This emergency contact MUST be available throughout the duration of the visit and at any hour. The visit leader is responsible for providing the emergency contact person with all details of the visit including the emergency contact details of all participants including staff.
- b) The emergency contact person for all Level 2 visits should be the EVC or a senior member of staff with direct access to the Head Teacher and Academy Leadership Team.
- c) Emergency contact persons must be trained in the responsibilities and execution of that role.
- d) Any emergency should be reported immediately to the emergency contact person who will inform the EVC and other relevant parties.
- e) The visit leader must take appropriate action to deal with emergency situations and is obliged to act upon the instructions and advice of any emergency service professionals involved.
- f) Designated 'visit' mobile phones are available to both visit leader and emergency contacts. Visit leaders must not give a direct mobile phone number to parents / carers as they will need to focus upon dealing with any emergency situation without distraction. Emergency contact details given to parents / carers should be the number of the 'visit' mobile phone held by the emergency contact person or main reception (to pass concerns to the EVC or Head Teacher/Head Designate during Academy working hours). Any emergency contact from parents / carers can then be safely passed to the visit leader by the emergency contact person.
- g) The Joseph Swan Academy Critical Incident Plan is available to enable leadership / senior staff to respond appropriately to any critical incident on an educational visit.
 - i.e. where any participant ...has suffered a life-threatening injury or fatality
 - ...is at serious risk
 - ...has gone missing for a significant and unacceptable period.
- h) The Gateshead LA Care Call Team may well be a first or early contact for emergency services and press following a critical incident. The Gateshead LA Educational Visits Consultant has provided a protocol for LA Care Call Staff re managing contacts following a critical incident and this team will provide information to emergency services and make contact with the school in the aftermath of a critical incident. This system operates 'out of hours' as well as during normal working hours. This system depends upon the EVOLVE visit approval system for information.
- i) Under no circumstances should visit staff engage with the press regarding any incidents during a visit. Press enquiries should be referred directly to the Head Teacher.
- j) OEAP National Guidance provides further information on Critical Incident Management and emergency procedures. This can be found online at <http://oeapng.info/>

Financial management including charging for visits

- a) Visit organisers are strongly advised to consult at an early stage with the EVC and Business Development Manager if there are significant financial aspects to planning a visit. A template visits 'Budget Planning Tool' is available.
- b) No charges / costs may be levied where the visit is an essential part of a student's course
- c) Charges can be made for board and lodging if the visit is residential. This does not apply to students in receipt of free school meals.
- d) Voluntary parental (or carer) contributions can be requested to help fund the visit if it is an 'optional extra'. However, this must be done in advance and with sufficient time to cancel the activity if not enough money is raised to cover the costs of the visit.
- e) Students unable to afford a visit may be able to access funding to support their participation. Visit leaders, students and parents / carers should make enquiries about the availability of such funding via the Academy Pastoral Teams.
- f) If there are financial concerns regarding a visit subsequent to approval being given it is the visit organiser's duty to inform and seek advice from the EVC immediately. An example of such concerns might be the withdrawal of students that results in a shortfall of monies due to be paid to a provider. In such circumstances, the EVC will arrange for the visit organiser to discuss and resolve such concerns with the Academy's Business Development Manager.
- g) Care must be taken with external providers terms and conditions with regard to non-returnable deposits / cancellation charges etc.
- h) Procedures for the management of students own monies whilst on a visit must be carefully planned and, where the visit staff act as 'bankers' for students, a secure storage such as a hotel safe must be used. Receipts / a receipt book must be used when money is deposited and paid out to students during a visit.

Insurance matters (adapted from the Gateshead LA Educational Visits and Learning Outside the Classroom Policy and Code of Practice)

- a) Joseph Swan Academy insurance cover will cover the following matters as they apply to educational visits:-
 - Indemnity – to provide an indemnity to its employees against claims that arise as a result of carrying out their official duties. There are a small number of exceptions to this such as fraud, criminal offence etc.
 - Employers Liability – the Academy will maintain this policy to cover its legal liability for claims arising from accidental injury to employees.
 - Public Liability - the Academy will maintain this policy to cover its legal liability for claims arising for accidental injury to anyone who is not an employee and for loss or damage to property.
 - Personal injury - the Academy will maintain cover for employees who sustain bodily injury by assault whilst on official duties and for education employees who sustain bodily injury while carrying out extra curricular teaching activities – this provides pre-determined benefits payable only in the event of serious injury or permanent disability. Employees may also have additional cover through their Conditions of Service, and should check this for their own particular circumstances. Staff may wish to consider taking out less limited Personal Accident cover privately or through a professional association.
 - Personal property - other than the cover provided by the Public Liability insurance above, loss or damage to employees' or children's personal effects is not covered by the Academy insurance. Employees should check whether they are covered by their particular conditions of service.
- b) Cancellation and Personal Accident cover for Educational Visits within the UK should be arranged if there is a significant financial commitment.

- c) Separate insurance should always be arranged for journeys outside the UK.
- d) When buying insurance cover from any source, the terms of the policy should be studied carefully, paying particular attention to the exclusions.

Code of conduct on educational visits

- a) A 'code of conduct' statement is included in the visit consent form signed by parents.
- b) Visit leaders must always clearly state their behaviour expectations to all participants at the outset of any educational visit and visit staff must actively monitor this aspect of the visit at all times.
- c) 'Unsupervised/free' time is to be avoided if at all possible and should only be allowed within strict geographic boundaries if deemed necessary and appropriate. Staff monitoring and supervision at such times should be particularly vigilant. It must always be made clear to parents in an information letter if 'unsupervised/free' time is being planned into a visit. A statement regarding the management of any such time must be given in the risk assessment.
- d) Whilst on an educational visit, students and staff are representing our Academy in the wider community. Excellent standards of appropriate dress and conduct are therefore expected.
- e) The Academy 'Behaviour for Learning' policy extends to all aspects of educational visits.
- f) Risk assessments should state the planned response and arrangements regarding incidents of serious misbehaviour – particularly those that may endanger the health, safety and wellbeing of participants or the general public.

Compliance

- a) This policy complies with National Guidance on writing establishment policy for Outdoor Learning, Off-site Visits and Learning Outside the Classroom
- b) Joseph Swan Academy adopts the Outdoor Education Advisers' Panel (OEAP) National Guidance for the management of Outdoor Learning, Off-site visits and Learning Outside the Classroom. This can be found online at <http://oeapng.info/> . Staff are encouraged to view this information when planning an educational visit.
- c) Joseph Swan Academy adopts the Gateshead LA Educational Visits and Learning Outside the Classroom Policy and Code of Practice insofar as it applies to schools with Academy status and the Gateshead EVOLVE system of visit approval. These - along with a number of other educational visit guidance documents can be found at ... https://evolve.edufocus.co.uk/evco6/evchome_public.asp (login required)
- d) If there appears any conflict between the Academy's policy and the OEAP or Gateshead LA Guidance referred to above then the Academy policy must be followed and clarification sought from the EVC.