



HEARTS ACADEMY TRUST

School Visits and Incidents Policy

This policy is to be read in conjunction with the Critical incident plan for school trips policy located on the Trust website: - [HEARTS Academy Trust Policies](#)

Adopted by Trustees: 22nd May 2024
Reviewed: May 2024 – overseas procedures added
Next review: May 2025

V7

You must Inform your EVC & Head of School of any incident / near misses ASAP.
Call ECC if required: 0333 013 9880. Refer to the Critical incident plan for school visits.
All schools in the Trust follow the OEAP guidance which can be found at <http://oeapng.info/>

HEARTS Academy Trust is committed to providing a happy, caring and safe learning environment for all within a values led context, where everyone feels valued and grows in confidence and independence.

We promote **HAPPINESS** through a creative, exciting and practical curriculum, which generates a love of, and interest in, learning and a resilience and hope which supports us through challenging times.

Great value is placed on pupils' self **ESTEEM** which is developed through a positive and motivated attitude to learning, a healthy lifestyle, good social skills, self-discipline and a positive self-image.

We promote the highest standards of **ACHIEVEMENT** in all areas of the curriculum and help all pupils to fulfil their potential regardless of gender, race or ability.

We foster **RESPECT and RESPONSIBILITY** for all by establishing good relations between the school, home and community. Pupils are taught respect for themselves, others and the environment. They are also taught to take full responsibility for their own choices and responsibility for themselves and their community.

We encourage **TRUTH** and honesty in all aspects of school life – relationships, work and the curriculum and learn to trust and accept others' individuality and uniqueness.

We develop **SPIRITUALITY and SERVICE** so that calm, quiet, reflective times which support deep thought are part of school life and beauty is appreciated. We promote a service culture that reflects our duty to support and show compassion to all members of the community and not just ourselves.



Children at the HEART

Establishment type	School
Name of establishments	Briscoe Primary School & Nursery, Hilltop Infant School, Hilltop Junior School, Stambridge Primary School, Waterman Primary School, The Wickford Church of England School
Who is employer	HEARTS Academy Trust
Responsibility for offsite visits and dates trained (possibly EVC, or deputy head)	Kimberly Gilchrist – 20/11/2023 – 19/11/2026 Annie Bristow – 06/02/2026 – 05/02/2026 Hannah Spalding – 21/11/2023 – 20/11/2026 Jenny Ready – 02/11/2021 – 01/11/2024 Richard Hall – 30/09/2022 – 29/09/2025 Debbie Loveless – 03/10/2022 – 02/10/2025
Policy approved by trustees	22 nd May 2024
To be reviewed	Annually
Other Policies Related	Child Protection, SEND & Inclusion, volunteer, finance, health and safety, critical incident plan for educational visits DfE H&S advice on legal duties & powers
Other Paperwork Attached	Visit Leader Checklist Blank risk assessments are available on Evolve

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SLT School Trip Check List

SLT must ensure that the lead teacher can answer all of the following questions before they leave the school site.

- Has a leader been designated?
- Does the leader have a mobile phone? Do they have the school and EVC number?
- Have all staff swapped phone numbers?
- Do all staff have a copy of the policy?
- Are first aid kits taken?
- Do you have a copy of individual health needs/medication?
- Does the lead know how many children they have?
- Does the transport being used look safe?
- Do all staff members have a copy of the risk assessment?
- Can the teacher tell you what to do if there is an incident?

Steps of Risk Assessment:

We adopt all OEAP guidance to include advice and guidance relating to the threat from terrorism (1)(2).

1. Visit leader meets with EVC briefly to discuss the trip in general (approx. 4 weeks before the trip).
2. The planning stage of all trips must include the devising of an “emergency plan”. The plan is to help staff plan for and respond effectively to an emergency. See Appendix 4 for examples of incidents that you may consider including in your plan and examples of what a good plan will cover.
3. For local visits in the UK, the leader carries out a pre-visit to gather information and advice about the specific levels of risk.
 - a. EVC to review the locations/venues' Risk Assessments and Critical Incident procedures/policies.
4. For visits further afield, including overseas visits, the leader gathers information and advice about the specific levels of risk through a tour operator, activity or accommodation provider, host establishment, etc., or by conducting a preliminary visit.
 - a. EVC to review the locations/venues' Risk Assessments and Critical Incident procedures/policies.
5. The leader does a risk assessment then they book the trip (not before) - get permission slips etc.
6. EVC checks on Evolve etc.
7. As pupils leave for their trip on the day an SLT member checks they have a safe transport method, a copy of the emergency policy, a copy of RA and it all seems safe (first aid etc.).
 - No unsupervised trips, EVER.
 - No lone adult trips.
 - No parent or staff cars.
 - All helpers need a HEARTS/update service DBS.

Any time a child crosses the threshold of the school grounds the EVC must approve this. Please refer to the EVC for recurring trip protocol.

(1) [Outdoor Education Advisors Panel: Visits and the threat from terrorism](#)

(2) OEAP also provides guidance on handling [emergencies on visits](#) and [residential stays](#)

1. Introduction

- 1.1 The Board of Trustees has the responsibility of providing guidance for off-site school visits. It is essential that all staff members read this policy before contemplating or organising any educational trip or visit to be made by children.

HEARTS Academy Trust staff should:

- Read THE OEAP National Guidance – Guidance for the Management of Outdoor learning, Off-site visits and Learning Outside the Classroom. (Essential reading documents specific to your role e.g., Governor / Head / EVC / Visit Leader / etc.);
- Refer to the following website link: www.oeapng.info/;
- Read this policy in full.

N B: FAILURE TO FOLLOW THESE REGULATIONS MAY LEAD TO CONSEQUENCES FOR INSURANCE COVER AND LEGAL LIABILITY.

2. Reasons for visits

- 2.1 All schools are required to offer children a broad and balanced curriculum that promotes spiritual, moral, social, cultural, mental and physical development.
- 2.2 All activities must have a clearly defined educational purpose and we seek to ensure that the curriculum is delivered to all children, regardless of social background, race, gender or differences in ability. All are entitled to the development of knowledge, understanding, skills and attitudes. To enrich the curriculum for the children at the school we offer a range of educational visits and other activities that add to what they learn at school.

3. Visits and curriculum links

- 3.1 All educational visits and activities support and enrich the work we do in school. There are also a number of people who visit the school to support our work. Some visits relate directly to areas of learning for individual classes, whilst others relate to all our children.
- 3.2 For each subject in the curriculum there is a corresponding programme of activities, which includes visits by specialists.

All these activities are in line with guidance published by the LEA:

- English – theatre visits, visits by authors, poets and theatre groups;
- Science – use of the school grounds, visits to local woods and parks;
- Mathematics – use of shape and number trails in the local environment;
- History – castle visits, study of local housing patterns, museums;
- Geography – use of the locality for fieldwork, fieldwork further away
- Art and design – art gallery visits, use of the locality;
- PE – range of sporting fixtures, extra-curricular activities;
- Music – range of specialist music teaching, extra-curricular activities, concerts for parents and children to hear;
- Design and technology – work with local secondary schools;
- Computing – its use in local shops/libraries/secondary schools etc.;
- RE – visits to places of worship, visits by local clergy.

NOTE – when extra-curricular activities take place there should always be an adult, other than the one running the activity on the premises.

4. Gaining approval for a trip

4.1 Trustees

As part of their responsibility for the general conduct of the school, Trustees have adopted this policy for the effective and safe management of educational visits.

Trustees must approve any visit involving an overnight stay and visits overseas. Trustees delegate to the Head of School and EVC the responsibility to approve all other visits.

Trustees have adopted a Charging and Remissions policy which is available to view on the trust website.

4.2 The Head of School and EVC:

- Are responsible for ensuring that all school activities are properly planned and appropriately supervised and that this policy is implemented;
- Should ensure that the aims of the visit are commensurate with the needs of the pupils, including those with special educational needs for whom additional, appropriate arrangements may need to be made. For additional guidance see SEN and Disability Act 2001;
- Should ensure the suitability of all staff appointed to the visit;
- Should ensure that the visit leader fully understands his or her responsibilities;
- Should implement effective emergency contact arrangements;
- Should ensure that financial and insurance matters, staff ratios and parental consent are dealt with appropriately;
- Ensure regard is given to The Health and Safety Executives (HSE) guidance on promoting a balanced approach to children's play and leisure;
- Ensure regard is given to the DfE guidance on Health and Safety on educational visits;
- Ensure that a competent member of staff has sufficient knowledge and is trained in managing security and risks relating to educational visits.

4.3 EVOLVE

All residential and overseas trips must be reviewed, scrutinised and approved by EVOLVE (Juniper). EVOLVE will provide advice and guidance for all trips.

5. Choosing a provider

After considering the reasons for the visit, the visit leader should research the provider in line with OEAP National Guidance.

On Residential, Adventurous or Overseas visits, leaders should check to see if the provider holds the LOTC Quality Badge or has specific National Accreditations (ABTA bonded, AALA license, Adventure mark, etc.).

6. Parental Consent

Consent must be secured in line with OEAP National Guidance.

7. Visits and staffing

CHECKLIST FOR ALL OFF-SITE ACTIVITIES

The visit leader must:

- Complete the “Visit Leader checklist”;
- Must recognise that whilst leading the visit, he or she is in effect representing the Head of School and holds delegated responsibility for Health & Safety and duty of care;
- Ensure all adults taking part in the trip have a HEARTS Academy Trust DBS or a relevant update service DBS.

8. The visit

8.1. On the day

The following are to be taken on the day of the trip:

- An amended list of children who are present and going on the visit (copies to be handed into the school office);
- A full list of adults/staff and groups of children for which they are responsible (copies to be handed into the school office);
- An itinerary for the entire day (copies to be handed into the school office);
- A copy of the written briefing notes for adults and staff;
- A final check of children out of the classroom to ensure bags, lunchboxes and clipboards are taken;
- A first aid kit, sick bucket, inhalers and other medication e.g., EpiPen(s);
- A mobile phone;
- Copies of emergency/critical Incident cards given to all adults and staff.

When a vehicle with seat belts is used, adults and staff must instruct pupils to wear the seat belt and indicate if they cannot secure the belt. EYFS and younger pupils should be assisted to fasten their seat belts.

8.2. During the visit

Young children must be kept in groups at all times led by an adult or member of staff.

There should be a system in place to safeguard young people at all times. (e.g., If toileting issues arise, an approach could be not to send young children into the toilets on their own but in small groups.

Courtesy to the public must be shown at all times, care taken not to block pathways, etc.

Adults and staff should ensure the safety and well-being of the pupils in their care and inform the visit leader or another member of staff of any relevant incident involving pupils in their care as soon as possible.

Every adult and member of staff must be given an emergency procedures card. This will have the school's contact and action plan in case of an emergency.

8.3. On return to school

Check all children off the coach. A member of staff must lead the class either into school or to an area of the playground where children can be collected by a parent. Once collected the member of staff must tick the child off the attendance list as collected, thus ensuring that each child departs with a known parent.

A teacher must remain with uncollected children until all parents have arrived and all children have departed.

9. Financing the visit

When stating the cost for each individual:

- Explain how the cost of the visit has been calculated and that the school would like voluntary donations from parents to fund the visit;
- Stipulate the Trust's policy concerning parents who are unable to offer a voluntary contribution, which is that, no child will miss a trip if parents do not make a voluntary contribution;
- Stress, that if sufficient financial support is not forthcoming that the visit may have to be cancelled;
- State when and how you would like to receive payment.

10. Insurance

Introduction:

Insurance across the Trust is provided under the DFE's Risk Protection Arrangement (RPA) for Academy Trusts. It provides cover for accidents or injuries arising during site visits, across the UK and overseas, whether to employees or pupils.

Determining whether or not the Trust is liable in any given case will depend on the circumstances, and on whether it can be shown that the Trust has been negligent.

Personal:

In respect of pupils, schools have a legal duty to take care of the well-being and safety of young people. Where there is a breach of this responsibility a claim for compensation may be brought.

There is no requirement for schools to make provision for loss through personal injury as the result of an accident where no blame may be attached. Personal accident insurance cover for pupils is a matter for the parents to arrange.

Indemnity:

The written consent of parents must always be obtained for the participation of pupils in any activity out of school or outside the planned curriculum. Schools should have appropriate forms available for this purpose.

Any specific questions about insurance should be directed to the Trust Central Team.

11. Transport

School Transport Policy

Refer to guidance from OEAP.

We do not transport pupils in private cars, without the express written permission of the CEO, Head of School and EVC.

All drivers of minibuses must have a "reward and hire" license.

12. Emergency / Critical Incident Procedures

See OEAP National Guidance document:

- All leaders must carry the school's 'Critical Incident policy', with emergency telephone contact details and action plan to be referred to should an incident happen;
- On return, the visit leader must comply with the school's normal accident reporting procedures.

13. Monitoring and Evaluation

After any visit, it is good practice to ensure a system of feedback, review and rigorous evaluation. In the case of overseas visits, there is a particularly strong case for ensuring this takes place and includes the consultation of the young people concerned, the parents, the leaders and partner organisations.

Such a process will help in the celebration of success as well as feeding into the general planning and risk management for future visits. Any significant issues should be shared with the EVC, the Head of School and the employer's advisory team.

14. Behaviour

HEARTS Academy Trust Behaviour policy applies to all trips and visits.

15. Data Protection

The HEARTS Academy Trust Data Protection policy applies to all trips and visits.

Information about staff and participants, including recognisable photographs, is subject to data protection law and will be in line with OEAP National Guidance.

16. Property

Participants and leaders are responsible for their own property.

Leaders are to ensure there is adequate security for property, for example, for valuables during a residential visit, or if participants are required to hand over or leave behind certain items during an activity.

17. Overseas trips

Staff should ensure that the intended outcomes of the activities are balanced with all reasonably practicable safety precautions.

For all visits it is essential that consideration is given to the following:

- Culture: food and drink, local customs, religion, expected behaviour/dress;
- Gender issues, sanitary arrangements, corruption, political stability;
- Financial information;
- Alcohol and drugs;
- Accommodation: checked for suitability, security, safety precautions and emergency evacuation;
- Transport systems have been assessed as safe for use.

The visit leader should consider the relevant country information from the Foreign and Commonwealth Development Office website: <https://www.gov.uk/foreign-travel-advice>. All relevant FCDO information should be circulated amongst the staff team.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all eligible participants should hold a valid GHIC (Global Health Insurance Card). See www.dh.gov.uk Following Brexit there may be a requirement for some staff and pupils to hold visas to travel, this must be checked in advance.

17.1 Weather, Clothing and Survival

Where appropriate, the leader must obtain and act upon recent weather forecasts and local advice.

Participants should be adequately clothed appropriate to:

- The time of year, prevailing weather conditions, altitude and exposure to elements;
- Likely changes in weather;
- The experience and strength of the party;
- The nature of the visit and environment.

When venturing away from immediate help, leaders should consider the need for:

- Comfort, insulation and shelter for a casualty;
- Comfort, insulation and shelter for the whole group;
- Provision of emergency food and drink;
- Provision of light (torch);
- Possible need for signaling equipment and/or mobile phone (NB. Mobile phones may not work in remote areas).

It is primarily the responsibility of the visit leader, in consultation with other staff where appropriate, to modify or curtail the visit or activity (e.g., Plan B) to suit changed or changing circumstances, for example: over-busy lunch area, rain, rising water levels, etc.

18. Using an external provider

An 'External Provider' is defined as where there is an element of instruction, staffing, or guiding, for example:

- Activity Centre;
- Ski Company;
- Educational Tour Operator;
- Overseas Expedition Provider;
- Climbing Wall where instruction is provided by Climbing Wall staff;
- Freelance instructor of adventurous activities;
- Youth Hostel (where instruction is provided);
- Voluntary organisation (e.g., Scout Association), where instruction is provided.

For the purposes of this guidance, an External Provider is NOT a:

- Youth Hostel (where accommodation only is used);
- Hotel, B&B, etc.;
- Campsite;
- Museum, gallery, etc.;
- Tourist attraction;
- Theme Park;
- Farm;

- Coach, Train, or Airline company;
- Swimming Pool;
- Climbing Wall where instruction is provided by a member of school staff;
- Staff with an approved Activity Leader Form (ALF) (Section 30 applies);
- 'Volunteer' instructor of adventurous activities.

The decision about the use of an external provider is the responsibility of the visit leader, EVC, and Head of School. The Lead Approver does not maintain a list of 'approved' external providers or tour operators. Schools will find it useful to 'Search by External Provider' on EVOLVE, and liaise with other schools that have used a particular provider.

Schools should consider the requirements under 'best value' when selecting an external provider.

To confirm that all aspects of the operation of the provider are satisfactory, the school must ensure that either:

- a) The provider holds a LOtC Quality Badge www.lotcqualitybadge.org.uk or www.kaddi.com;
or
- b) A 'Provider Form' has been satisfactorily completed by the provider.

Note: If a provider holds an AALA license (and/or any other accreditation) but not a LOtC Quality Badge, then a Provider Form is still required.

Procedure for providers that hold an LOtC Quality Badge no further action is necessary, other than to check the suitability of the provider/venue in relation to the intended aims or learning outcomes for the particular group.

Procedure for providers that do not hold an LOtC Quality Badge:

- Download a provider form from National Guidance;
- Complete the top section;
- Send Provider Form to the provider;
- On its return check that it has been satisfactorily completed;
- Upload the completed Provider Form to EVOLVE, - or keep it on file.

Important: If the provider has made any alterations to the wording of the "Provider Form" or is unable to comply, then you must discuss this with the provider, and if necessary, seek advice from the Lead Approver prior to making a commitment with the provider.

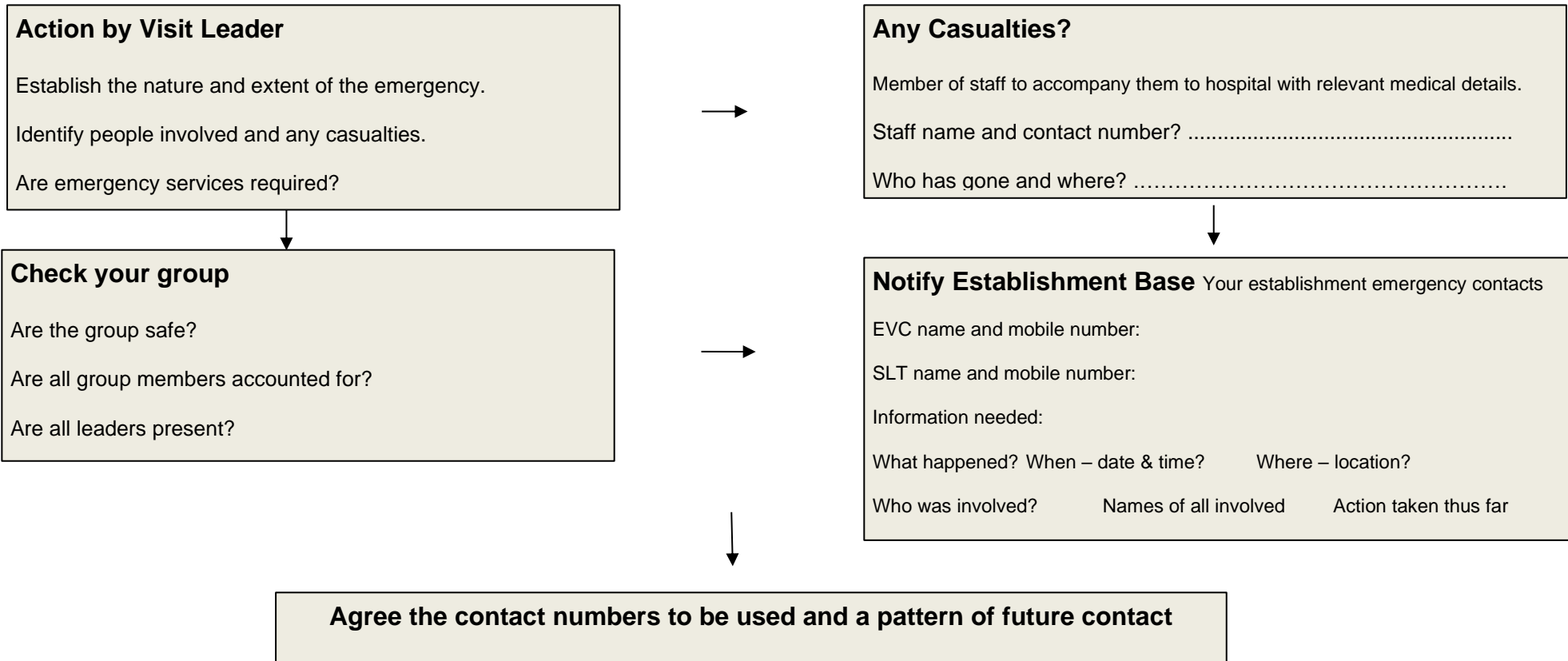
The "Provider Form" should be sent to the provider at the time of making a provisional booking and no deposits should be committed prior to its satisfactory completion and return.

The satisfactory completion of a "Provider Form" does not necessarily signify that the service on offer will be appropriate for the young people from your school. A pre-visit and recommendation from previous users will help you decide on its suitability.

In some instances, for example where a school intends to use an 'external' voluntary individual for services, then this person may be regarded as a temporary member of staff and the procedure outlined in Section 30 may be appropriate.

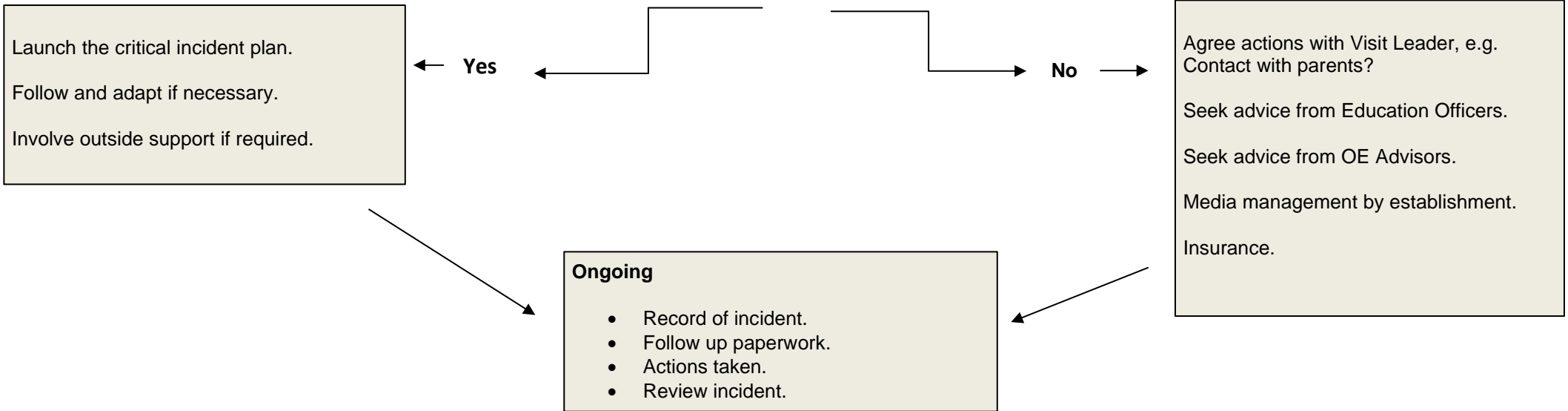
Appendix 1 – Emergency Procedures Action Plan

Please follow the steps below to help manage emergencies effectively



Action by Establishment

Is this a Critical Incident?



Appendix 2 - School emergency contact details

- Where the HOS is on the visit the Executive Head is the first emergency contact. Where they are not, the Head of School is. They should have access to the risk assessment for the visit. The group leader should provide this;
- Second contacts should also be arranged from senior staff at the school (usually senior teachers/school business manager);
- The numbers of contacts should be carried by group leaders at all times throughout the visit;
- The emergency contacts at school must have family contact details for all pupils accessible throughout the visit (including weekends if needed);
- It is the responsibility of the emergency contact to speak to parents (individually if needed);
- Parents should be kept well informed throughout the emergency. This can be via X (previously known as Twitter) if it is a minor incident such as a delayed coach. Parents must understand before the visit that by not signing up for X, email or other media used by the school they may experience a delay in communication;
- The emergency contact will establish whether further help is needed at the emergency site;
- A full record of the incident must be kept and ensuing contact with parents/media;
- The emergency contact will also keep the CEO informed throughout and discuss contact with parents;
- The CEO will inform the Chair of Trustees.

Appendix 3 - Additional Resources

- [Health and Safety on Educational Visits](#)
- [Visits and the threat from terrorism](#)
- [Good practice](#)
- [Residentials](#)
- Education Advisers' Panel (OEAP) guidance on handling emergencies on visits and residential stays [HSE guidance on school trips](#)

Appendix 4 – Making an Emergency Plan

Your plan should explain how you would respond if you needed to take any temporary actions in the event of an emergency.

The aim of an emergency plan is to help you and your staff plan for and respond effectively to an emergency. The emergency could happen at the setting or on an educational visit or outing.

Your emergency plans should be generic enough to cover a range of potential incidents. These incidents may include:

- Public health incidents (for example, a significant infectious disease incident);
- Severe weather (for example, extreme heat, flooding, storms or snow).

A good plan will cover:

- Roles and responsibilities;
- When and how to get advice if you need it;
- Details on the types of steps you might take in the event of an emergency and the actions you'd take to enact them quickly;
- A list of key contacts;
- How you would communicate to children, parents and staff how you would respond if your advice were not accepted.