



LANCASTER UNIVERSITY
SCHOOL OF MATHEMATICS

Lancaster University

School of Mathematics

Trips & Visits Policy

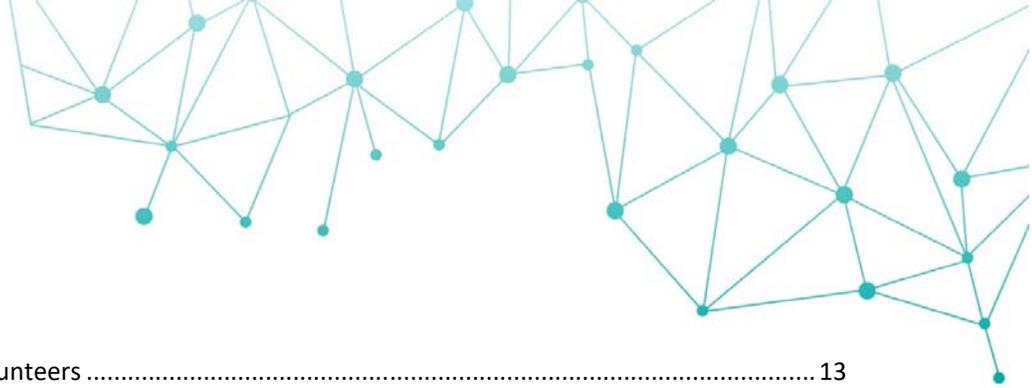


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1.0. Purpose

This policy provides procedures and guidelines for the organising, authorising and implementation of visits and residentials. They are designed to meet current Health and Safety requirements, Department for Education guidance and best practice in relation to visits and residentials.

2.0. Legal Framework

This policy draws on the following legislation and guidance:

- Health and Safety at Work Act 1974
- DfE Health and Safety on Educational Visits 2018 – see <https://www.gov.uk/government/publications/health-and-safety-on-educational-visits/health-and-safety-on-educational-visits>
- Outdoor Education Advisors Panel National Guidance – see <https://oeapng.info/downloads/all-documents/>
- Health and Safety Executive - School Trips – Tackling the Health and Safety Myths – see <https://www.hse.gov.uk/services/education/school-trips.htm>

3.0. Policy Statement

Lancaster University School of Mathematics aims to provide a world-class teaching and learning environment and create an inspiring culture of enquiry for students and teachers. Providing all students with a wide range of high-quality experiences outside the classroom will enhance their personal and social education, as well as enhance their cultural capital. All trips and visits will be well planned and assessed for the impact that they will have on students, as well as the potential risks and mitigations.

4.0. Related Documents

- Trip Request Form
- Risk Assessments for completion
- Trip Leader’s checklist
- Child Protection and Safeguarding Policy
- Behaviour Management Policy
- SEN Policy
- Health and Safety Policy
- Staff Code of Conduct
- Critical Incident Policy

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- Charging and Remissions Policy
 - First Aid Policy
 - Supporting Students with Medical Needs Policy

5.0. Roles and Responsibilities

Board of Trustees: will be responsible for ensuring that a suitable Trips and Visits Policy, and related procedures, are in place and are being implemented effectively. The Board is responsible for ensuring that the policy is reviewed annually, and any incidents are being reported to, and reviewed by, the Board.

Head of School: is responsible for the implementation and review of the Trips and Visits Policy and procedures and for approving all school trips. The Head of School is responsible for ensuring that all staff involved in implementing this policy are competent for the roles allocated. The Head of School will be the Educational Visits Coordinator and must ensure that any Trip Organisers and leaders have the necessary competence and experience to ensure that the trip will run safely. They must keep a report of any accidents or near misses that occur on school trips. For trips resulting in total spend of over £5,000 the Head of School will be responsible for obtaining the approval of the Chief Financial Officer.

Trip Organiser: will have overall responsibility for managing a visit or trip, including for the health and safety of participants and staff. This responsibility includes for the supervision, welfare, learning and development of participants. They must be competent for their role as Trip Organiser and able to assess the competence of other adults supporting them. They must provide all the relevant information regarding the trip to allow for its approval, including costs, transport arrangements, staffing requirements and the relevant information packs to be issued to students and parents. The Trip Organiser must complete and submit the risk assessment with the aid of suitably qualified professionals. The Trip Organiser is directly responsible for student behaviour whilst on the trip or visit and any necessary preparation. They must ensure that parental consent has been obtained, first aid arrangements are in place and all safeguarding issues have been addressed. They must book a school mobile phone via the Business Manager and ensure a first aid kit is taken on the trip and returned to school on their return.

Staff: All staff accompanying/supervising students during a trip must abstain from drinking alcohol whilst supervising students, in case of emergency or the need to drive. They must ensure that they are familiar with the risk assessment and procedures for the specific trip or visit and that students are supervised in line with all school and Trust policies.



Students: must comply with the Behaviour Management Policy at all times. They must comply with the directions of staff and volunteers supervising the trip or visit and provide contact information, as required.

5.1. Assessment of Trip Organiser Competence

Any member of staff leading a trip must be assessed for competence to ensure that they are suitable for the role. The Head of School will assess the capabilities of this member of staff to ensure that:

- They are an experienced visits leader
- They have the status to be able to guide the working practices of other staff
- They are confident in assessing the ability of other staff to lead visits
- They are confident in assessing outside activity providers
- They will be able to advise the Head of School and Trustees when they're approving trips
- They have access to training, advice and guidance

This member of staff is referred to in this document as the Trip Organiser.

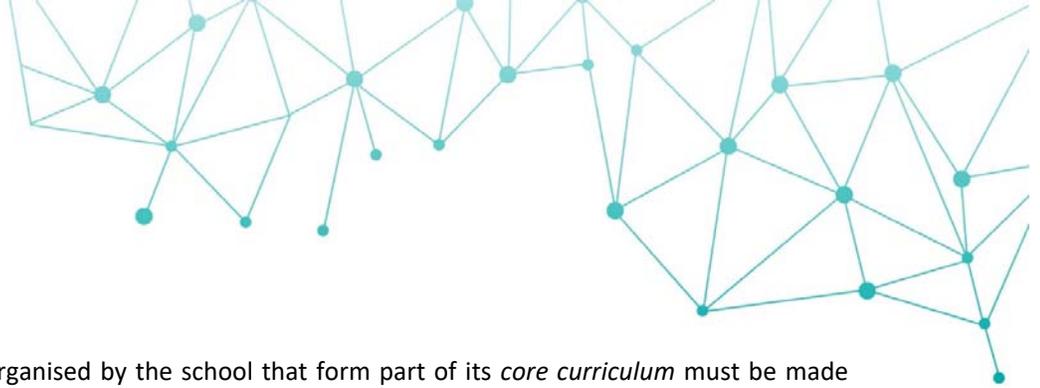
6.0. Risk Assessments

Risk assessments must be undertaken by the Trip Organiser and approved by the Head of School prior to a trip commencing. These risk assessments should cover all activities planned as part of the trip and outline all mitigations and control measures.

This information, including all control measures, must be communicated to students and staff participating in the trip or visit, in advance. A blank risk assessment form and generic risk assessments are available on the school learning platform. All risk assessments shall be specific to the trip or visit and must be signed and dated before being submitted to the Head of School for approval.

7.0. Equality and Diversity

LUSoM strives to offer equal opportunities to all its students regardless of sex, race, age, religion or belief, sexual orientation, pregnancy or maternity, marriage or civil partnership gender reassignment, disability or financial circumstances. All students will be encouraged to participate in as wide a range of activities as possible.



Any trips or visits organised by the school that form part of its *core curriculum* must be made accessible to all students. Core curriculum activities that place significant barriers to participation with no suitable substitute or alternative offered will be rejected during the approval phase. In line with the Charging and Remissions Policy all core curriculum activities (on or off-site) will be delivered free of charge to students.

Extra-curricular activities should, so far as is reasonably practicable, be made accessible to all. Reasonable adjustments should be made to ensure that the trip or visit is structured to ensure full accessibility for the relevant students. If it is not possible to ensure all aspects of the trip or visit can be accessed by all students, then parents/guardians and students will be informed of why and offered an alternative, if possible. Charges may be made for these extra-curricular activities, and these will be communicated to parents and guardians. Bursaries may be used to subsidise these charges in line with the Charging and Remissions Policy.

8.0. Organising and Managing a Trip

8.1. Organisation and Approval

Prior to organising a trip, the Trip Organiser should seek approval for the trip or visit in good time. This will begin with an approval in-principal process. A minimum of one months' notice for day visits or two weeks' notice for half-day visits will usually be required. For trips longer than one day within the UK or for more complex day trips, the aim is for approval to be sought at least one term in advance. For all overseas trips, the Trip Organiser should seek approval in-principle and financial approval at least one year in advance.

The Trip Organiser must issue the following information to the Head of School:

- An agenda containing all planned activities, their relevance to the school's curriculum, benefits to students and any mitigations for staff absence
- Details of the location where the activity will occur
- Budget costs for the trip or visit

The Head of School will review the proposed activity and either approve or decline to approve the planned trip or visit in-principle.

Once approved by the Head of School in-principle, the Trip Organiser may begin to organise the trip and consult with the relevant members of school staff. A suitable date for the trip or visit will be determined during this period and this date should allow sufficient time for the organiser to:

- 
- Carry out a full risk assessment detailing risks and mitigations associated with all planned activities and have this approved by the Head of School
 - Obtain and share the details of the transport provider(s) including name, contact, health and safety information, etc.
 - Obtain and share details of the activity provider including name, contact, health and safety information, insurance, etc.
 - Determine the staffing and supervision required during the trip or visit including any specialist staff required and/or any staff training required
 - Provide details of any additional equipment required to conduct the activities outlined
 - Provide the budget which should cover all expenses related to the trip. The Trip Organiser should clarify any proposals for students/ parents to contribute to the funding of the trip (i.e., what the contribution will be for and what the cost is likely to be). This final budget must then be approved by the Head of School.
 - Book and pay for the infrastructure required for the trip including accommodation, transportation, or venue
 - Draft the parental consent forms, detailing the activities included, and any costs they must pay for. These forms will typically have to be issued at least one month in advance of the planned trip. Records of consent will be stored on the school information system and the Trip Organiser is required to check these for all students.

Any information collated during this process must be reviewed and approved by the Head of School and relevant SLT members, prior to issuing information to students and parents or booking any services. No un-approved activities should be conducted during a trip or visit.

The Trip Organiser is responsible for ensuring that the trip or visit is completed within the approved budget. Any overspend beyond the approved budget without prior notification and approval shall be allocated to the departmental budget.

8.2. Insurance

Travel insurance is not needed for a one-day trip, as staff and student are covered under Public and Employers Liability Insurance.

The Trust will obtain travel insurance that will cover most residential trips. When organising a residential trip, please consult with the Head of School and Business Manager for details of the travel insurance policy and summary of cover details. Details of any students with medical conditions who will be participating in the trip should be passed to the Business Manager so they can check with the Trust's insurer that adequate coverage is in place. The Chief Financial Officer should be consulted regarding insurance for any overseas trips. The Rigby Education Trust is



covered for overseas travel under the Department for Education Risk Protection Arrangement. Details of the policy limits are available from the Business Manager and Chief Financial Officer.

The Trip Organiser is responsible for checking that any external provider of elements associated with the trip or visit has public liability insurance of at least £5 million and suitable arrangements for participant first aid.

8.3. Information Required by the Head of School

The Trip Organiser is responsible for providing specific information to the Head of School and other teachers which includes the following:

- A list of students attending the trip (to both the Head of School and to teachers/tutors whose students will be out of lessons due to a trip or visit)
- Where an incident may occur whilst on a trip, an Incident Investigation Form is to be completed on return to school by the trip organiser

The Head of School will share this information with the relevant staff, and it will be used to ensure all attendance information is properly recorded and any incidents are recorded and reviewed.

8.4. Managing Contact Information from Parents and Students

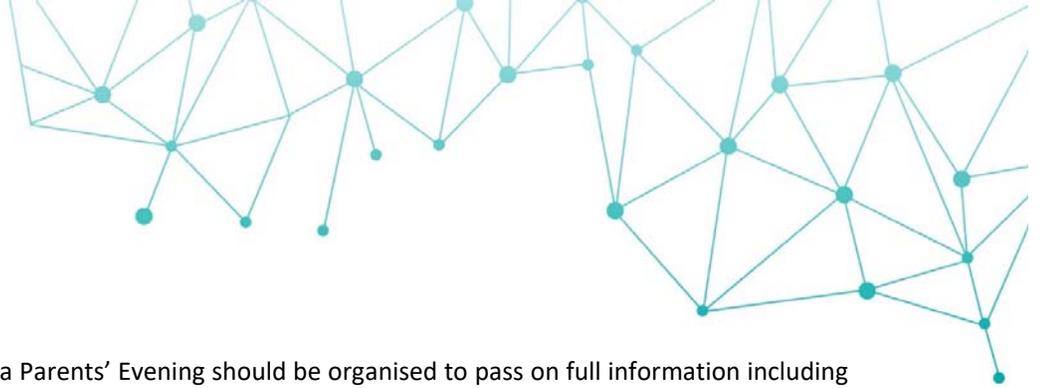
Any personal contact information for parents and students will be requested as part of the consent form. The use of any contact details stored on the schools IT systems will be confirmed should they be required during the trip.

These contact details will be issued to the Trip Leader(s) electronically via email to their work email and will be stored on the mobile phone that will be used for the trip or visit. Upon the completion of the trip this contact information must be erased from the leader's mobile device and electronic mailbox.

8.5. Information to Parents & Parental Consent

On enrolment at LUSoM, parents and guardians will be asked to provide consent to their child taking part in educational visits that are classed as Day Visits and therefore, additional consent will not be required.

Any trip or visit that is not classed as a Day Visit will be require additional specific consent from parents or guardians. This must be sought in writing and consent can be given by email or by the return of a specific consent form. It is the responsibility of the trip organiser to ensure all students attending the trip have parental consent. The trip organiser must ensure students without parental consent do not come on the trip. Students aged 19 and older do not require parental consent.



For residential trips a Parents' Evening should be organised to pass on full information including a booklet and to address any questions.

Prior to departure on a trip, all parents/guardians should be provided with appropriate detailed information for the trip. This information should include:

- Confirmation of date of trip
- Departure and return times and points of departure and return
- Name(s) of travel company
- Details of any accommodation
- Name of group leader and contact telephone number
- Name and telephone number for the school-based contact
- Any special clothing, equipment, food etc that students are required to take
- Any charges associated with the activity
- Any other appropriate information.

8.6. Information for Students

All participating students should be provided with the following information:

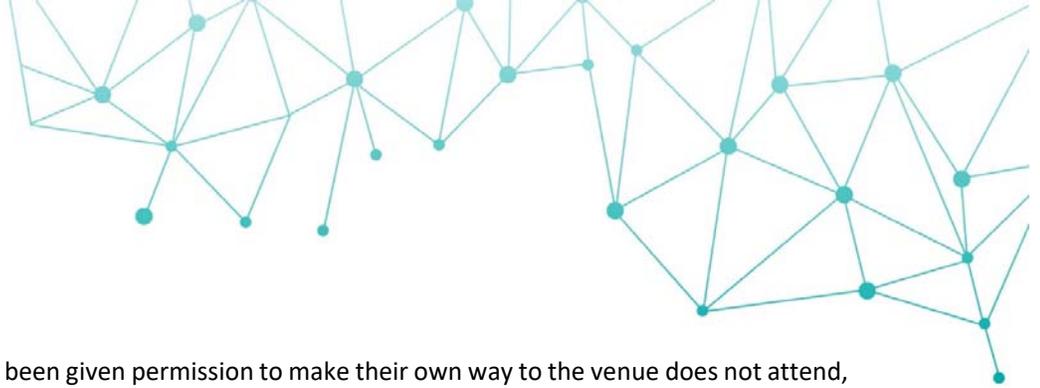
- The contact details of the Trip Organiser, which will include email and the number of the school mobile phone that they will be using
- An outline of their expected behaviour as school representatives
- Details of any proposed activities
- Any risks associated with the activities and their mitigations and control measures

8.7. Transport

All transport arrangements must be detailed on the trip approval request. Trips and visits should generally depart from the LUSoM site and return to the LUSoM site or from a safe and defined pick-up point near to the school site. This applies to both one-day and residential trips and allows parents a point of drop-off and pick-up. Students can also make their own way to and from a trip venue, train station or airport depending on the trip organisers instructions and itinerary details.

Where a trip is organised in the North-West of England, and the student attending has requested to make their own way to-and-from the venue, the student may do so with written permission from the parent/carer to the organiser.

Where hired coaches/buses with driver are being used, LUSoM will require copies of the company's insurance cover. Any coaches used to transport students must be less than ten years old.



If a student who has been given permission to make their own way to the venue does not attend, the organiser must inform the Business and Outreach Manager immediately and their absence must be recorded.

Where students are attending a trip unsupervised, i.e. to collect a competition prize, a letter or email should be sent to parents to advise that there will be no school staff supervising the trip.

8.8. Supervision

The provision of suitable supervision for any trip or visit will be determined prior to its approval. The Head of School and Trip Organiser will determine whether LUSoM staff and volunteers can be used to supervise organised trips and visits. Any additional costs for supervision must be included in the budget for the trip or visit prior to approval.

A member of LUSoM's site staff must always be present to supervise and manage the trip as the Trip Leader. This will typically be the trip organiser but may also be another member of LUSoM staff should they be deemed more suitable.

It is generally advised that for large trips a minimum of 2 LUSoM staff accompany students and a ratio of 1:20 for staff and students shall be maintained. It is also advised that a female member of staff be present if at least 1 female student will be attending the trip and at least 1 male member of staff if there will be at least 1 male student.

8.9. Financial Commitments

LUSoM cannot refund any deposits or full payments of trips to students once travel and accommodation arrangements have been finalised.

All associated costs, including transfers, flights, accommodation, staff ratio, staff expenses (not including alcohol) etc., must be incorporated within the total cost of the trip prior to requesting approval.

If a trip runs at a budget deficit, then the costs will be charged to the trip organiser's departmental budget.

9.0. First Aid

As part of the organiser's risk assessment and staffing requirements, they must outline the need for first aid equipment or a qualified first aider to accompany them. The Trip Organiser shall ensure that the first aid kit for trips and visits is booked through the Business Manager and is taken on the trip. The provision and use of First aid during trips and visits must be conducted in line with LUSoM's First Aid policy.



10.0. Supporting Medical Needs

Prior to final approval, and as part of the organiser's risk assessment, the Trip Organiser must account for any students with medical needs. This must be done in Line with LUSoM's Supporting Medical Needs Policy and guided by the SENCo, the students' parents/guardians, GP's and health workers.

Any additional supervision, medicine provision (e.g. spare medication for emergencies), emergency contacts and instructions to follow in the event of an emergency must be determined and communicated to all relevant parties.

11.0. Emergencies During Trips

In the event of an emergency during an organised trip or visit, the following instructions must be followed:

- The Trip Leader must contact and liaise with emergency services at the scene
- The Trip Leader should contact the Head of School at school during office hours or the Head of School (via their mobile phone) after office hours
- Staff should not directly contact parents and should inform the Head of School of what has happened as clearly as possible. The Head of School will then communicate with parents.
- The Trip Leader is to keep the Head of School regularly updated

The procedures in the Critical Incident Policy shall be followed in any instances of an emergency during a trip or visit.

11.1. Accompanying injured or seriously ill to hospital

In line with LUSoM's First Aid policy the Trip Leader should act 'in loco parentis' until a senior member of staff arrives at the scene. If the trip is abroad and a senior member of staff has not yet arrived, the Trip Leader must accompany the injured or seriously ill to hospital ensuring that the rest of the group are left in the safety of other members of staff who have accompanied the group.

11.2. Getting the other student's home



This should be done as quickly as possible to minimise distress. Transport arrangements should be confirmed with the travel provider (e.g., airline, coach firm etc) and the trip leader should then inform the Head of School on the estimated time of arrival.

11.3. Contacting parents of injured students and parents of other students on trip

The Head of School shall liaise with the Business Manager who will have details of all students and staff involved in the trip and will inform the Executive Principal and Chair of the Board of Trustees, as required. In the event of large numbers of students involved, the other Senior Leadership Team members will be contacted so they can help in the communication process.

12.0. Charges and Refunds

There will be no charge for any trip or visit carried out as part of the school's core curriculum. Extra-curricular activities may incur charges, and these will be communicated to students and parents/guardians. Deposits and payments must be made before the trip or visit commences.

Bursaries may be used to subsidise charges for extracurricular activities in line with the Charging and Remissions Policy.

LUSoM cannot refund any deposits or full payments of trips to students once travel and accommodation arrangements have been finalised. If a student pulls out of a trip or visit on medical grounds or another serious exception (e.g., a bereavement) any refund of a deposit will be reviewed on an individual basis. If the trip or visit is cancelled by the school or is deemed not to be able to go ahead, deposits will be refunded.

13.0. Use of External Providers

Any external organisations hired by LUSoM to carry out activities must be checked for competence prior to its employment. These checks will be led by the Trip Organiser and will include:

- A check of the provider's insurance coverage
- A check to ensure the provider meets the legal requirements to conduct the proposed activity, including any licensing
- A check of the organisation's health and safety and emergency procedures and policies
- A check of the external provider's risk assessments and their control measures
- A check to ensure the provider has suitable safeguarding procedures in place
- A check of any subcontracting arrangements the provider may have



The Trip Organiser is responsible for clearly outlining and confirming the roles and responsibilities for the staff of any external provider. All external staff working closely with students will require DBS clearance prior to commencing work or suitable supervision by school staff, depending on the requirements of the risk assessment.

If any external provider does not pass these pre-trip/visit checks, they will not be used.

14.0. Unsupervised Trips

There may be some occasions which may involve students travelling to and from a venue without staff supervision i.e. a student collecting a competition prize. However, the Trip Organiser must ensure all visit and trip approval forms (including risk assessments) are submitted to ensure the school has all details of students with an approved absence. The contact details of the Trip Organiser and school reception must also be given to students attending the trip, for use in case of emergencies.

15.0. Use of volunteers

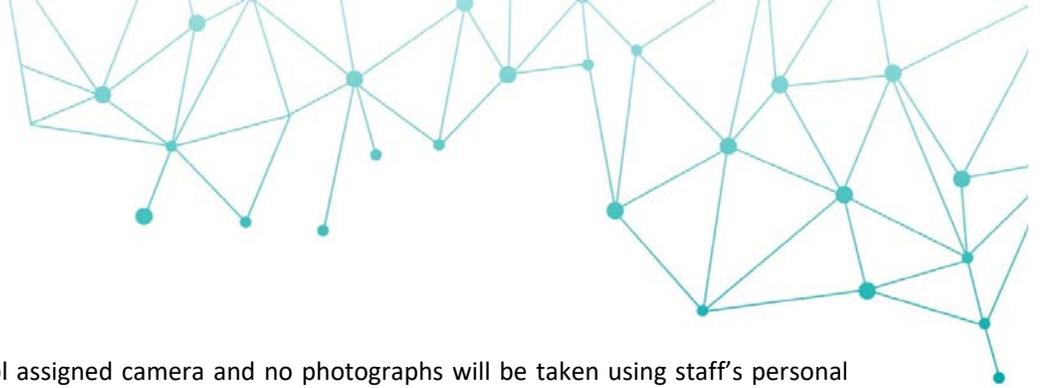
Any volunteers who accompany any visit or activity must be vetted and be directly supervised by a member of staff. All volunteers must be DBS checked and cleared by LUSoM and deemed competent for their role in the trip or visit.

16.0. Monitoring and Record Keeping

All forms and documents for every trip or visit organised must be recorded and stored on the school management system. This will include a list of participants, any risk assessments and reports (including for emergency incidents). This information will be used to monitor the performance of the trip and will be used to develop and improve future trips.

17.0. GDPR Consideration

Photographs of students during trips should be kept to a minimum. Should photographs be taken and used by the school (e.g., for marketing) this will only be done where consent has been given during enrolment at LUSoM. The venue must also be made aware of any photos taken on their premises. No photographs of students should be taken without consent. Photographs will be



taken using a school assigned camera and no photographs will be taken using staff's personal devices.

The sharing of personal information with other organisations (e.g. hotels, coach companies, etc), particularly on trips abroad, should be kept to the absolute minimum.

Note: In the event of emergencies, the disclosure of certain personal information beyond the absolute minimum may be required (e.g. to medical providers, police, etc.) to ensure the health and safety of students.



APPENDIX A - Risk Assessment Template

Conducted By:

Date:

Subject:

Review Date:

Signed:

	Hazard	Details		
1	Describe the hazard and how it may cause harm	T		
2	Identify the individuals or Groups of persons at risk and Explain how they might be affected			
3	Identify the existing control Measures and explain how They are intended to control the Risks (where information Is not explicit you may make reasonable assumptions, but any assumptions you make must be explained)			
4	Give a risk rating, using the Matrix provided	Severity	Likelihood	Overall Rating
		/5	/5	/25
5	Justify your assessment of The foreseeable severity of harm. Include an evaluation of the effectiveness of any control measures			
6	Justify your assessment of the likelihood of harm.			



	Include an evaluation of the effectiveness of any existing control measures.			
7	Consider any further control measures required and explain how they will reduce the risk to an acceptable level (so far as is reasonably practicable)			
8	Give a final risk rating using The matrix provided.	Severity /5	Likelihood /5	Overall Rating /25

Risk Assessment Matrix (Risk Rating)

	Certain (5)	Very Likely (4)	Likely (3)	May Happen (2)	Unlikely (1)
Death (5)	25	20	15	10	5
Major Injury (4)	20	16	12	8	4
Up to 7 day Injury (3)	15	12	9	6	3
Minor Injury (treatment Off-site) (2)	10	8	6	4	2
Minor Injury (First-Aid On-site) (1)	5	4	3	2	1

Score	Priority	Action
1- 4	LOW	Action is required to reduce the risk, although low priority. Time, effort and cost should be proportional to the risk.
5-10	MEDIUM	Action required soon to control. Interim measures may be necessary in the short term.
11- 25	HIGH	Action required urgently to control risks. Further resources may be needed.