

UPPINGHAM

EDUCATIONAL VISITS POLICY

Applies to all off-site visits, including:

- UK and overseas residential visits including pupil exchanges
- Day trips to entertainment venues for academic, cultural or social purposes
- Academic study visits and field trips
- Sports team away fixtures and tours
- CCF camps, adventurous activities, expeditions, including the Duke of Edinburgh's Award

Summary of revisions

From the previous format of the Educational Visits Policy a number of changes have been made to reflect current best practice and national guidance, as well as refinement to the trips process. The most notable changes are as follows:

- ESSENTIAL: Removal of the Covid-19 temporary policy changes
- ESSENTIAL: Update of Brexit implications including visas
- ESSENTIAL: Update of requirements regarding EHIC and GHIC cards
- Alignment with the Outdoor Education Advisory Panel National Guidance
- Specific guidance for trip leaders in the organisation and delivery of trips
- Roles and responsibilities updates
- Use of Evolve to manage the trip planning, consent and approval process
- Continued improvements to accessibility and clarity of key concepts

Next review

Scheduled update in September 2025. Additional revisions may need to be added as a result of changes to policies post Brexit. Note that the process for trip related Risk Assessments is also under review.

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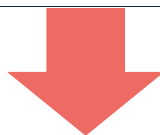
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Procedures for day trips

The day trip procedure can be broken down into the following keysteps and timeframes:

1. Pre-approval
2. Evolve documentation and medical
3. Pre-trip checklist
4. Post trip

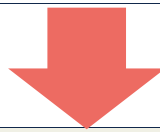
STEP 1: PRE-APPROVAL One month before trip departure or at the latest two weeks	
ACTION	<ul style="list-style-type: none"> - Discuss your trip with your Head of Department, Houseparent or other line manager in the first instance - If you are unsure about the procedures or viability of the trip do discuss this with the EVC - Complete a calendar request. Please note that ALL calendar entries must be approved by the Assistant Head Co-curricular before the trip can proceed
OUTCOME	If approved, trip leader to: <ol style="list-style-type: none"> 1. Add the event to the school calendar 2. Create a budget using residential trips budget template for approval



STEP 2: EVOLVE At least two weeks before departure	
ACTION	Log into Evolve (1) and add the following details: <ul style="list-style-type: none"> - Type of trip (note that trips involving adventurous activities or an overnight stay will require further information and should be discussed with the EVC) - Purpose of trip - this is particularly important and should align with the school and department objectives - Dates - a single day or multiple occasions. Use the information icon to see if there are any other trips recorded on these dates - Venues and/ or external provider - there is a database of previously used venues and providers but please add to this if yours isn't listed - Mode of transport - if using a provider you will be asked to select which provider (i.e. coach company) or add details of a new provider. Minibus bookings are done via the calendar - Staff - paperwork should be done by, or at least alongside, the trip leader. Please add the school mobile number of the trip leader. - Attendees - identify the year group and number of pupils. At this stage it is also useful to add the nominal roll of pupils by clicking the orange pen next to register and the orange pen again under participants. You should be able to search by year, house and academic set. Once finished click 'back to form' on the top right - Cover - this just gives us an idea of what lessons are being missed for trips - it is still the teacher's responsibility to liaise with their Head of Department and arrange cover as appropriate - Finance - gives us an overview of the cost of the trip. Please take note of the advice regarding charging parents and talk to the Bursary if you have any queries - Risk assessment - this form constitutes the specific component of the risk assessment for a simple

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	<p>day trip. At this point you will need to add the generic risk assessments that relate to the activities you are undertaking. The link to 'resources' opens a selection of generic risk assessments in a new window. Simply download those applicable, usually one for transport and one for the activity. Read through this document and make any relevant amendments before going back to your trip form and uploading these. If you do the same activity regularly then you can have one document on file that you upload each time. With all these things, the process speeds up as you become familiar with it. You can go to the resources from the homepage using the pink tab, then the pink icon and then the 'Generic Risk Assessments' tab. Contact the EVC if your activity doesn't have a generic risk assessment</p> <ul style="list-style-type: none">- Further details - you can add more information but for most simple day trips that will be enough to submit for approval
APPROVAL	Educational Visits Coordinator (EVC)



STEP 3: PRE-TRIP CHECKLIST Two days before departure	
ACTION	<ul style="list-style-type: none">- The trip leader must notify Houseparent's and matrons know so that pupils can be marked as absent, and any pastoral issues can be flagged- A copy of the nominal roll, medical and pupil contact details is accessible on Evolve and the trip leader should make sure they have access to this on the trip via Evolvego.- An email to all staff, including Matrons, must be made prior to departure to include; names of pupils attending, departure date and timing of trip <p>Medical</p> <ul style="list-style-type: none">- Collect first aid kit from Woodfield- Ensure you have any pupil specific medication for pupils prior to departure from house matrons if required <p>Trip phone</p> <ul style="list-style-type: none">- Collect trip phone from Jules Whittome



STEP 4: POST TRIP Day after return	
ACTION	<ul style="list-style-type: none">- Report any accidents or incidents as per School Policy, also inform the EVC, Woodfield and the Houseparent- Complete the Evolve evaluation form- Consider sending through a write up and/or any photos to the marketing department- Return school phones, first aid kits- Any printed paperwork relating to the trip should be disposed of appropriately, records will be kept on Evolve

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Procedures for residential trips – International

Trip Procedure – Residential International

The process for residential trips outside of the UK can be broken down into the following key steps:

1. Pre-approval
2. Budget approval and vaccinations
3. Expression of interest
4. Evolve documentation and medical
5. Pre-trip checklist
6. In trip processes – Evolvego
7. Post trip

STEP 1: PRE-APPROVAL One year before trip departure	
ACTION	The trip leader should send an email to the Head of Department, Educational Visit Co-ordinator (EVC) and Assistant Head: Co-curricular with the following information: <ol style="list-style-type: none"> 1. Name of trip 2. Purpose of trip 3. Location 4. Dates and times 5. Pupils involved (year group, classes) 6. Staff attending The trip leader should expect a response within two working weeks
APPROVAL	Assistant Head: Co-curricular
OUTCOME	If approved, trip leader to: <ol style="list-style-type: none"> 1. Add the event to the school calendar 2. Create a budget using residential trips budget template for approval



STEP 2: BUDGET APPROVAL AND VACCINATIONS One year before trip departure	
ACTION	Budget Once the budget has been completed the trip leader should send the completed budget to accounts. You must include: <ul style="list-style-type: none"> - The budget completed on the residential trips budget template - A schedule of payment Vaccinations Please complete the Travel Information Form and send to Woodfield: Woodfield@uppingham.co.uk
APPROVAL	Budget to be approved by EVC and Kathryn Monument (Trips Account Manager) (KEM@uppingham.co.uk) Vaccinations required for the trip to be advised by Woodfield Health Centre
OUTCOME	Finance will approve your budget and the proposed schedule of payment. They will be able to issue you a trip code at this stage Woodfield will provide a table of recommended vaccinations that will be added to your expression of interest form

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STEP 3: EXPRESSION OF INTEREST

One year before trip departure

ACTION	<p>An Expression of Interest form can now be sent to relevant parents/guardians. This will be sent centrally via SchoolPost. To enable this please contact the EVC and Jules Whittome who will create a page on UppNet for your trip. The trip leader will need to provide them with the following information:</p> <ol style="list-style-type: none"> 1. Pupils to be invited – this needs to be in an Excel spreadsheet and include bursary numbers – use the draft template on UppNet 2. Name of trip 3. Destination of trip 4. Deadline to complete the Expression of Interest form 5. Two sentences about the trip 6. Approved cost 7. Table of required vaccinations as provided by Woodfield 8. Draft itinerary and other information that will be added to UppNet <p>A trips page on UppNet in which your trip details and Expression of Interest form will be held will then be created. Once complete an email will be sent to parents via SchoolPost.</p>
APPROVAL	EVC or Assistant Head: Co-curricular
OUTCOME	<p>The trip leader will be able to access an Excel spreadsheet which contains the list of pupils who have expressed interest. It is recommended that you hold an information session for parents, where the trip is of a higher cost or involves long haul and/or adventurous activities, to assist in pupil selection. If the trip is viable then move to: STEP 4 Evolve documentation and medical</p>
IMPORTANT	<p>Once you know which students are attending please contact Woodfield Health Centre with the list of students and their bursary number so that they can check the immunisation status of all pupils and send out the relevant vaccination consent forms via School Post.</p>



STEP 4: EVOLVE + MEDICAL

11 to 6 months before departure

ACTION	<ul style="list-style-type: none"> <input type="checkbox"/> Begin adding your trip information to Evolve <input type="checkbox"/> Upload the pupil list to Evolve <input type="checkbox"/> Use the consent form within Evolve to gain consent for the trip and collect passport numbers and EHIC/GHIC numbers as well as enable parents to check the medical details held for pupils <input type="checkbox"/> Payment can now be taken – please ask Jules Whittome and the EVC to help with this Email Jules Whittome with the payment schedule and trip code so that this can be added to your trip page on UppNet – the template for this can be accessed here <input type="checkbox"/> Provide the Trips Account Manager with a list of pupils AND their bursary number for the trip <input type="checkbox"/> Use the pre-prepared risk assessments and add those provided by the tour operator <input type="checkbox"/> Ensure that you have requested a trip phone – all trips must take a trip phone <input type="checkbox"/> Contact the House Matron for any pupil who will require controlled medication or care plans <input type="checkbox"/> Book in a time to see the EVC <p>Parents/guardians are solely responsible for any visas required and the school will not be able to assist with this</p>
APPROVAL	Assistant Head: Co-curricular and EVC
OUTCOME	Once complete notify the EVC for approval – go to pre-trip checklist

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STEP 5: PRE-TRIP CHECKLIST 1 month before departure

Before you depart on a trip you should:

- ☑ Have a final meeting with the EVC to ensure all documentation is in order
- ☑ Collect your trip phone – you can access details of all pupils on your trip using Evolvego. The trip phone is available from Jules Whittome and must be taken on all trips (1-2 days before departure)
- ☑ **Email pupils** with details of the trip (copy in HsMs and Matrons) re: departure time and location, dress code, food and or money requirements
- ☑ **Send parents the [pre-departure form](#) (3 weeks prior to departure)** to ensure that you have details re: onward travel and any remaining information
- ☑ **Ensure you have a letter from the Headmaster** – you should check with the tour provider but generally this should include the pupils AND staff names, date of birth and passport numbers (use the [template here](#) and forward to Jules Whittome, who will format this for you before sending to Catherine Tremlett for the Headmaster's signature)
- ☑ Have the contact details of the ELT members who are available for support during your trip

Medical

- ☑ **Collect first aid kit and over the counter medications** from Woodfield
- ☑ **Two weeks prior to departure** send the medical list of students attending the trip to Woodfield and Safeguarding team to check for any updates
- ☑ Ensure you have collected any **pupil specific medication** for pupils prior to departure from house matrons. Ensure any care plans have been uploaded to Evolve. These should be obtained from matrons. Please note that you will need to use the 'Administration of Controlled Drugs Form' when issuing controlled medication. Controlled medication must be kept in the locked box provided at all times. The locked box must also be placed in the hotel safe upon arrival at the destination.

Money

- ☑ If you need a trip **debit card** you need to contact the bursary **one month prior to departure** (contact Kathryn Monument, Trips Accounts Manager, KEM@uppingham.co.uk)
- ☑ If you require **cash** please notify the bursary **2 weeks prior to departure** (contact Kathryn Monument, Trips Accounts Manager, KEM@uppingham.co.uk)



STEP 6: IN TRIP PROCESSES – EVOLVEgo

When taking a trip you must:

1. Take the register in Evolvego – multiple registers can be taken for a given trip by clicking on the Roll Call option
2. Record all pupil specific medication on the form: [administration of own pupil medication](#)
3. All incidents should be recorded in the incidents section of Evolvego
4. Controlled medication must be recorded in the pupils specific controlled drug register (please collect controlled medication from houses). All controlled medication must stored in a locked container and the locked tin must be locked in the hotel safe upon arrival at the destination
5. Record all over the counter medication on the 'Over the Counter Medicines Form' provided by Woodfield.

Once you are back from a trip you must inform the ELT member of staff who has been allocated to that trip

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STEP 7: POST TRIP Immediately upon return

On returning to Uppingham you will need to:

1. Return the trip phone to Jules Whittome
2. Complete the trip evaluation form on Evolve
3. Return over the counter medication, first aid kit and trip medication form to Woodfield.
4. Return pupil-specific controlled medication sheets and remaining controlled medication to Matrons
5. Notify the EVC of any issues during the trip

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Procedures for residential trips – UK

The process for residential trips within the UK can be broken down into the following key steps and timeframes:

- | | |
|-------------------------------------|---------------------------------|
| 1. Pre-approval | 5. Pre-trip checklist |
| 2. Budget approval | 6. In trip processes – Evolvego |
| 3. Expression of interest | 7. Post trip |
| 4. Evolve documentation and medical | |

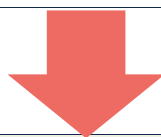
STEP 1: PRE-APPROVAL Six months before trip departure	
ACTION	<p>The trip leader should send an email to the Head of Department, Educational Visit Co-ordinator (EVC) and Assistant Head: Co-curricular with the following information:</p> <ol style="list-style-type: none"> 1. Name of trip 2. Purpose of trip 3. Location 4. Dates and times 5. Pupils involved (year group, classes) 6. Staff attending <p>The trip leader should expect a response within two working weeks</p>
APPROVAL	Assistant Head: Co-curricular
OUTCOME	<p>If approved, trip leader to:</p> <ol style="list-style-type: none"> 1. Add the event to the school calendar 2. Create a budget using residential trips budget template for approval



STEP 2: BUDGET APPROVAL Six months before trip departure	
ACTION	<p>Once the budget has been completed the trip leaders should send the completed budget to accounts. You must include:</p> <ul style="list-style-type: none"> - The budget completed on the residential trips budget template - A schedule of payment <p>Where possible costs should be included on the school bill and the finance department will be able to advise on this</p>
APPROVAL	EVC and Kathryn Monument (Trips Account Manager) (KAM@uppingham.co.uk)e
OUTCOME	Finance will approve your budget and the proposed schedule of payment. They will be able to issue you a trip code at this stage

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STEP 3: EXPRESSION OF INTEREST Six months before trip departure	
ACTION	<p>An Expression of Interest form can now be sent to relevant parents/guardians. This will be sent centrally via SchoolPost. To enable this please contact the EVC and Jules Whittome who will create a page on UppNet for your trip. The trip leader will need to provide them with the following information:</p> <ol style="list-style-type: none"> 1. Pupils to be invited – this needs to be in an Excel spreadsheet – use the draft template on UppNet. 2. Name of trip 3. Destination of trip 4. Deadline to complete the Expression of Interest form 5. Two sentences about the trip 6. Cost 7. Draft itinerary and other information that will be added to UppNet. <p>A trips page on UppNet in which your trip details and Expression of Interest form will be held will then be created. Once complete an email will be sent to parents via SchoolPost.</p>
APPROVAL	EVC or Assistant Head: Co-curricular
OUTCOME	<p>The trip leader will be able to access an Excel spreadsheet which contains the list of pupils who have expressed interest. It is recommended that you hold an information session for parents, where the trip is of a higher cost or involves adventurous activities, to assist in pupil selection.</p> <p>If the trip is viable then move to: STEP 4 Evolve documentation and medical</p>



STEP 4: EVOLVE + MEDICAL Six months before departure	
ACTION	<ul style="list-style-type: none"> <input type="checkbox"/> Begin adding your trip information to Evolve Upload <input type="checkbox"/> the pupil list to Evolve <input type="checkbox"/> Use the consent form within Evolve to gain consent and check the medical details held for pupils <input type="checkbox"/> Payment can now be taken – please ask Jules Whittome and the EVC to help with this Email Jules Whittome with the payment schedule and trip code so that this can be added to your trip page on UppNet – the template for this can be accessed here. <input type="checkbox"/> Provide the Trips Account Manager with a list of pupils AND their bursary number for the trip <input type="checkbox"/> Book in a time to see the EVC <input type="checkbox"/> Contact Woodfield Health Centre you will need to arrange a face-to-face visit with a School Nurse. Use the pre-prepared risk assessments and add those provided by the tour operator. <input type="checkbox"/> Ensure that you have requested a trip phone – all trips must take a trip phone <input type="checkbox"/> Contact the House Matron for any pupil who will require controlled medication
APPROVAL	EVC
OUTCOME	Once complete notify the EVC for approval – go to pre-trip checklist

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STEP 5: PRE-TRIP CHECKLIST

One month before departure

Before you depart on a trip you should:

- Have a final meeting with the EVC to ensure all documentation is in order
- Collect your trip phone – you can access details of all pupils on your trip using Evolvego. The trip phone is available from Jules Whittome and must be taken on all trips (1-2 days before departure)
- Email pupils** with details of the trip (copy in HsMs and Matrons) re: departure time and location, dress code, food and or money requirements
- Send parents the [pre-departure form](#) (3 weeks prior to departure)** to ensure that you have details re: onward travel and any remaining information.
- Have the contact details of the ELT members who are available for support during your trip

Medical

- Collect first aid kit** from Woodfield
- Ensure you have collected any **pupil specific medication** for pupils prior to departure from house matrons
- Ensure any care plans have been uploaded to Evolve

Money

- If you need a trip **debit card** you need to contact the bursary **one month prior to departure** (contact Kathryn Monument (Trips Account Manager) (KEM@uppingham.co.uk))
- If you require **cash** please notify the bursary **2 weeks prior to departure** (contact Kathryn Monument (Trips Account Manager) (KEM@uppingham.co.uk))



STEP 6: IN TRIP PROCESSES – EVOLVEgo

When taking a trip you must:

1. Take the register in Evolvego – multiple registers can be taken for a given trip by clicking on the Roll Call option.
2. For controlled medication please use the paper form – [administration of own pupil medication](#).
3. All incidents should be recorded in the incidents section of Evolvego.

Once you are back from a trip you must inform the ELT member of staff who has been allocated to that trip.

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1. Provision of employer guidance

Uppingham School (from here on referred to as Uppingham) has formally adopted the OEAP National Guidance as “Uppingham Employer Guidance”. This guidance can be found in an online database: www.oeapng.info. Hyperlinks within this document will direct to the most up-to-date and relevant areas of information.

This National Guidance has been endorsed by a number of key organisations including the HSE; National Union of Teachers; the Association for All School Leaders; the Adventure Activities Licensing Authority; ASPECT (The professional association and trade union representing professionals working in education and children's services); the Council for Learning Outside the Classroom and the Independent Outdoor Group, and is being adopted by increasing numbers of educational establishments.

OEAP National Guidance builds on the foundation provided by earlier Department for Education (DfE) publications:

- “Health and Safety of Pupils on Educational Visits” (HASPEV) (1998)
- “Health and Safety: Roles and Responsibilities” (2001)
- “Standards for LEAs in Overseeing Educational Visits” (2002)

The current DfE guidance (updated April 2022) can be found here: [Health and safety: responsibilities and duties for schools](#).

“Pupils should be safe in school and when undertaking out of school activities. The risk management to keep them safe should be proportionate to the nature of the activities. Teachers should be able to take pupils on exciting school trips that broaden their horizons.”

DfE 2018

The Health and Safety executive also have a stake in educational visits, they assist in the production of guidance documents and have the power to undertake spot visits in schools.

It is a legal expectation that Uppingham employees must work within the requirements of their employer’s guidance. In addition to this, Uppingham employees should also follow the National Guidance recommendations. The Uppingham policy may have more specific guidance that takes precedence over National Guidance.

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the National Guidance document: [Underpinning Legal Framework](#)

Where an Uppingham employee commissions a Learning Outside the Classroom (LOtC) activity, otherwise referred to as a provider or tour company, they must ensure that the provider has systems and procedures in place that meet or exceed the National Guidance. See [Provider led and Self organised visits](#) for further details.

2. Scope, remit and value

This policy and associated procedures provide guidance to staff, pupils and others on the planning, organisation and management of educational visits.

The National Guidance document [1c Status Remit and Rational](#) clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees involved in the: supervision; facilitating experiences; or, deploying staff who will supervise or facilitate experiences, where pupils undertake experiences beyond the boundary of their normal operational base.

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Employees must ensure the participants are supervised in accordance with the contents of this guidance, regardless of whether the activities take place within or outside normal working hours, including weekends and holiday periods.

This includes:

- UK and overseas residential visits including pupil exchanges
- Visits to museums, theatres, cinema etc. for academic, cultural or social purposes
- Academic study visits and field trips
- Sports tours and travel to sports fixtures
- CCF camps and expeditions
- Adventurous activities including Duke of Edinburgh’s Award expeditions

Exceptions include:

- Work experience placements – which are encouraged by School but organised independently
- Physical education and sports fixtures where the journey to and from the venue is covered by this policy. The activity and supervision are covered by the sports policy and risk assessments.

This policy relates to the following other Uppingham School policies, in particular those relating to: Safeguarding and Child Protection, Health and Safety, Bursarial and Financial. These can be found in the [Policies Library on UPPnet](#).

Uppingham recognises and accepts that such visits present risks to the health, safety and welfare of all persons, including staff and pupils, who undertake them. It is accepted that such activities cannot be completely without risk but will do what is reasonably practicable to prevent/avoid or control/reduce risks arising from these activities.

National Guidance uses the SAGED variables as metrics for risk on educational visits:

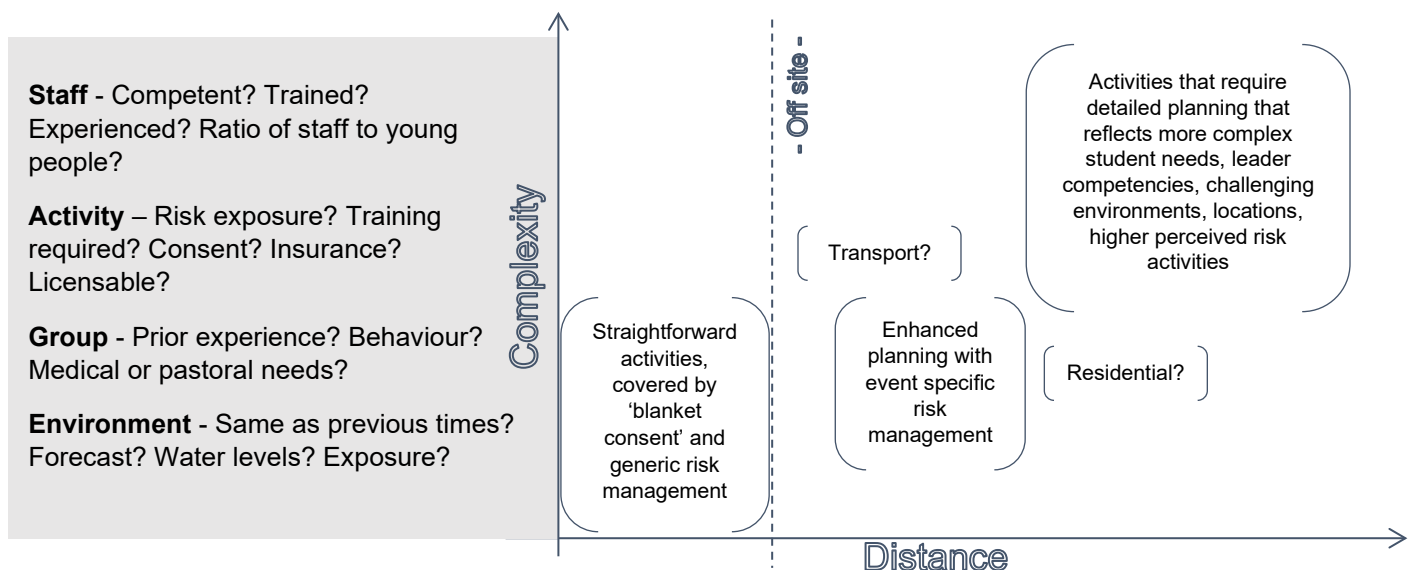


Figure 1: SAGED variables

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3. Roles and responsibilities

National Guidance sets out clear and detailed responsibilities and functions for specific roles within the School's structure, see [3.1b Establishment roles and their inter-dependence](#). Role specific guidance can be found at the following:

- [Trustees \(Employers\)](#)
- [Headmaster / Assistant Head Co-Curricular \(AHCC\)](#)
- [Educational Visits Coordinator \(EVC\)](#)
- [Visit or Activity Leader](#)
- [Assistant Visit leader](#)
- [Volunteer Adult Helper](#)

In addition to these roles detailed in the National Guidance, Uppingham's structure includes the following:

Bursar and Human Resources (HR) Director - responsible for the development, implementation and monitoring of the School's Educational Visits Policy, in conjunction with the Headmaster, Educational Visits Co-ordinator, and Health and Safety Manager.

Health and Safety Manager - responsible for providing competent health and safety advice, guidance and technical support, in conjunction with the HR Director, Educational Visits Co-ordinator and Trip Leaders.

Assistant Head Co-curricular - responsible for the management of the calendar ensuring that proposed educational visits do not clash with other activities in conjunction with the Headmaster, Deputy Head Academic, Heads of Department and Educational Visits Co-ordinator.

Bursary – provide a framework for managing the financial aspects of any visit. Their procedures must be followed by the trip leader and any budget, such as that for a residential trip, must be approved by the bursary.

Woodfield Health Centre – provide a framework for managing the health needs of pupils. Their procedures must be followed by the trip leader. Health needs of individual pupils will form part of the risk assessment for any trip and include all medical needs. Staff will need to visit their own GP or travel nurse for medical advice.

Marketing – manage the communication process between the school and external parties. They provide support with use of social media.

Pupils and parents also play an important role in trips. Parents should be kept informed through regular updates recorded on UPPnet and communication via School Post. Many trips, including all residential and those involving high risk activities will require parents to agree to terms of the trip and give their consent. Pupils should be involved in planning where possible to develop ownership of the trip and pupils will be expected to agree to abide to the Schools code of conduct.

All staff involved in a school trip have a 'non-delegable' duty of care in common law. Even when a third-party provider is used, the School remains liable for the manner in which it is performed and the consequences should something go wrong. Staff will act 'in loco parentis'; however, a higher duty is expected of professionals in line with their professional training.

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4. Basic requirements, competence and training

As an employer, Uppingham is required to ensure that its employees are provided with:

- appropriate guidance relating to visits and Learning Outside the Classroom (LOtC) activity
- employer-led training courses to support the guidance to ensure that it is understood
- suitable systems and processes to ensure that those trained are kept updated
- access to advice, support and further training from an appointed adviser that has proven expertise and professional understanding of the guidance, the training and expectations set by current good practice

The relevant training courses for Uppingham are:

- Educational Visit Coordinator (EVC) Training - Uppingham is required to have an EVC in post
- EVC Revalidation - EVC is required to undertake a periodic (3-5yrs) revalidation
- Visit Leader Training - all visit leaders have training and support from the EVC and an 'apprenticeship' system is operated with experienced staff mentoring staff with less trip experience. All new staff have 'visit leader training' as part of their induction programme and there is online training for visit leaders and staff taking part on trips on the iTRENT Learning Hub.
- Training for staff leading residential trips takes place as soon as trips for the next academic year are confirmed. This provides staff with an update on any changes to procedures and identifies the key elements of trip procedures.
- As part of their continued professional development, staff are encouraged to reflect on trips they have led. Senior colleagues regularly join trips and their support and guidance is useful in this reflection process.
- Where relevant staff are encouraged to undertake further professional development, such as RGS fieldwork training and first aid qualifications.
- All staff are required to take an online anaphylaxis and allergy refresher as well as asthma refresher training session via the iTRENT Learning Hub in addition to their First Aid Training.

The EVC provides online and face-to-face support for individual trip leaders and any issues are addressed when they arise. There are specific touch points within the residential trip planning process where a formal meeting is held to review progress in trip planning. Should an employee experience problems with finding the material they are looking for, require clarification and/or need further help and guidance, they are encouraged to consult the EVC or the Assistant Head Co-curricular who is also a trained EVC.

Competence to lead a trip comes from experience and personal qualities and for some trips eternally held qualifications (eg mountain leadership) see [3.2d/4.4a Approval of Leaders](#). The first question a trip leader must ask themselves is 'do I have the specific competence and experience to lead the proposed trip'?

Uppingham operates an informal apprenticeship system where staff accompany similar trips before being able to act in a Trip Leader role. Although every trip will have a defined leader, all trips will be supported by a team of staff that have a range of experiences and skills. Staff experience on trips, as a leader or assistant, is recorded in [Evolve](#) (the online management system Uppingham employs for the trips process) as well as via the HR department. Staff that are new to the school will be provided with specific training during their INSET.

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Qualifications relevant to adventure activities are recorded in Evolve as well as via HR. The Health and Safety department maintain a record of staff that have MiDAS qualifications and staff with foundation first aid training. Further information regarding qualifications to lead adventure activities can be found in the [Adventure Activities](#) section.

The process of approval (see [Approval and Notification of Activities and Visits](#)) considers the competence of the staff team in addition to the leader, to undertake such responsibilities as they have been assigned in-line with National Guidance. Certain activities may require specific training, and this is to be identified as part of the risk assessment process (see [Risk Management](#)).

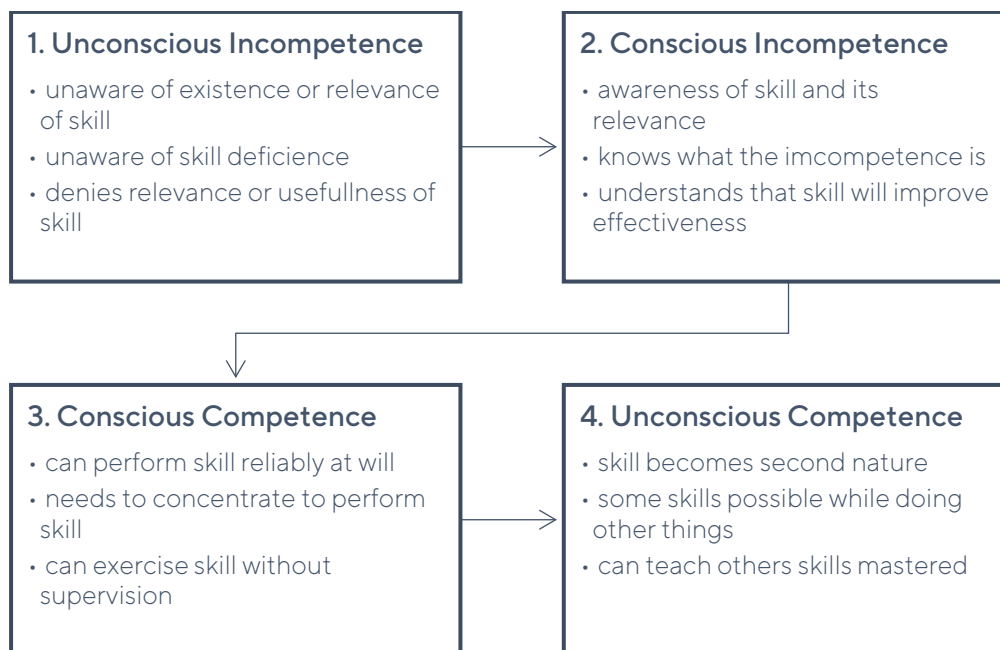


Figure 2: Four stages of competence

To be deemed competent, a trip leader must be able to demonstrate the ability to operate to the current standards of recognised good practice for that role. All staff and helpers must be competent to carry out their defined roles and responsibilities.

Employer Guidance (see [4.3a Good practice basics](#)) sets a clear standard for all trip leaders:

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

Staff participating in off-site activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff.

All Uppingham staff have current first aid qualifications. For trips involving adventurous or expedition-based activities, the trip leader should undertake more specialist first aid training. Most NGB qualifications

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(e.g. Mountain Leader) for leading adventurous activities have mandatory first aid requirements.

Where a volunteer helper is a parent (or otherwise in a close relationship to of a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the trip leader's plans for group management. The trip-leader should directly address this issue as part of the risk-benefit assessment. Staff involved in trips should be 'fit for work', specifically they should be in good health and must not consume alcohol whilst responsible for pupils.

5. Approval and notification of visits

Employer guidance must provide clarity on issues where responsibilities and functions are delegated. This is particularly critical in establishing requirements regarding formal notification and formal approval of activities.

Uppingham uses a web-based system called Evolve for notification and approval. This system creates an audit trail visible to key stakeholders: Assistant Head Co-Curricular (AHCC), HR Director, EVC, Health and Safety Manager, Woodfield Health Centre and the Bursary.

Day trips are approved by the EVC and residential trips are approved by the EVC in coordination with the AHCC. Term time sport fixtures are approved by the Director of Sport.

The competence of the staff team is key in ensuring the safety of the participants. Assessment, training and support of trip leaders is a priority of the EVC. All trips have a named leader who is an employee of the School. The approval administration is owned by the trip leader, though some administrative staff can assist with the preparation. Approval also considers the purpose of the trip and its alignment with the Uppingham Educational Strategic Plan.

6. Provider-led and self-organised visits

Tour operators take school groups almost anywhere in the world for a wide range of educational purposes. They offer coordinated programmes, combining travel, accommodation and learning activities, removing much of the organisational work from the trip leader. An advantage of using a provider is that they are responsible for delivering the package or for making suitable alternative arrangements in the event of incidents such as travel disruption. Providers should be fully assessed before engaging their services which can be done using the Provider Statement unless they carry the Learning Outside the Classroom Certificate. It is also essential that responsibility for elements of the trip is clearly delineated. This can be as straight forward as a coach driver being responsible for the vehicle and safe driving, whilst the trip leader is responsible for supervision and the safe conduct of the group. There should be absolute clarity about who is responsible for each specific activity during a trip. For example:

- The tour operator delivers the activity as part of its contract, and the tour operator is thus responsible for it
- The activity is delivered by a provider sub-contracted by the tour operator as part of its contract. The tour operator remains responsible for it
- The trip leader agrees for an activity to be delivered by a separate provider (perhaps recommended by the tour operator), and the tour operator is merely responsible for incidental arrangements such as transport. In this case the trip leader is responsible for selecting a suitable provider and agreeing their specific responsibilities
- The trip staff deliver the activity; and are responsible for it

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For UK based activities, quality assurances such as the Learning Outside the Classroom (LOtC) Quality Badge and Adventure Activities Licencing Authority (AALA) demonstrate compliance with nationally accepted standards of good practice in the delivery of activities to young people. Providers must hold an AALA licence for the following activities: caving, climbing, trekking, water sports (for more information see the information [here](#)).

The UK travel industry has legal requirements offering consumer protection, including the [Package Travel Regulations \(PTR, 2018\)](#) as of 1st July 2018. This stipulates financial security requirements which are often established through trade associations such as: Association of British Travel Agents (ABTA), Federation of Tour Operator Trust (FTOT), Association of Independent Tour Operators Trust (AITOT), Passenger Shipping Association (PSA), Confederation of Passenger Transport (CPT), Yacht Charter Association (YCA), and Association of Bonded Travel Organisers Trust (ABTOT). If the package includes air travel the organiser must hold an Air Tour Operator's Licence (ATOL) as of 1st October 2012. Using appropriate providers will help mitigate against scenarios like the [Tavistock College case study](#).

It is good practice for trip leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy. These include:

- [The LOtC Quality Badge](#)
- [AALS licensing](#)
- [Adventuremark](#)
- [School travel forum](#)
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).

National Guidance takes the view that where a provider holds such one of the above accreditations, there should be no need to seek further assurances. See further details in [4.4g Selecting External Providers and Facilities](#).

Staff should be aware of vicarious liability. Taking caution when recommending providers to pupils as we could be liable should anything happen as a result of inappropriate provision. For example, recommending pupils use a certain company for a DofE residential, rather than merely suggesting other pupils have used a certain company and there are alternatives on the DofE website.

6.1 Vetting and DBS Checks

Uppingham employees who work frequently or intensively with, or have regular access to young people or vulnerable adults, must undergo an enhanced DBS check as part of their recruitment process. DBS check (or other vetting procedure) in itself, is no guarantee as to the suitability of an adult to work with any given group of young or vulnerable people.

The placement of an adult within a situation of professional trust (where young people could be vulnerable to physical or mental exploitation or grooming) should always be on the understanding that an overview based on a common-sense risk-benefit assessment process has been considered. Refer to Uppingham's [Safeguarding Policy](#), the National Guidance [3.2g Vetting and Disclosure and Barring Service \(DBS\) Checks](#), and [Overseas Visits](#) for more information on due diligence when DBS checks are not possible.

6.2 Self-organised visits

These are likely to offer greater control over the programme and its relevance to the group. Trip leaders often say that they could have organised a better trip than the provider, considering our expertise and how well we know the pupils, this can sometimes be the case. However, we need to be aware that a self-organised trip requires more detailed planning and entails exposure to greater risk, particularly in a financial sense. The School, as a charity, where trips only make up an 'occasional' part of its business, to a limited

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group of travellers (PTR, part 1.3), is not required to comply with the PTR. However, in practice our policy and procedures align in the key areas: Ensuring information to pupils and parents is accurate and sufficiently detailed for them to make informed decisions; financial protection sufficient to repatriate the group through insurance, trust account or bond; and contractual liability to ensure the trip runs as planned, having appropriate alternative arrangements should a travel company or provider let us down. These trips will need to follow a more detailed Specific Risk Assessments process.

7. Monitoring and trip management

Uppingham ensures that all trips and activities are recorded, managed and monitored, in keeping with National Guidance 3.2b Monitoring. Trips are managed and recorded through the Evolve system which is principally monitored by the EVC and AHCC. Evolve is also the principle data source for approvals and evaluation of visits.

The apprentice approach and staff training help develop the quality of in-the-field delivery. Senior leaders and middle managers will also frequently join trips to develop and monitor the quality of visit delivery.

7.1 Overseas visits

When planning an overseas educational visit, the trip leader should gather as much information as possible on the country/countries being visited from the following organisations:

- The Foreign and Commonwealth office
- Embassies and Consulates
- National travel offices in the UK for the destination country
- Activity Providers
- Other schools that have used the Activity Provider or visited the location

Language should be evaluated as a potential risk. Within the trip leadership team should be the ability to hold a basic conversation and know what to say in an emergency. Pupils may need to have appropriate translation Apps on their electronic devices and the trip leader should have a translated document outlining the trip details.

Travel documents need to be reviewed by the trip leader to ensure all pupils and staff are eligible to travel. This includes passports and visas. Copies, digital and hard copy, should be available in case of loss or theft.

Although the School is able to make use of collective or group passport scheme, the criteria outlined in this scheme mean that we currently do not use this scheme for international trips.

British Citizens can travel without a visa to most EU countries, Iceland, Liechtenstein, Norway and Switzerland (not including Bulgaria, Croatia, Cyprus, Romania or Ireland) for a period of less than 90 days within a 180-day period (Schengen visa waiver). Pupils who spend a lot of time in Europe may end up exceeding this time and require an individual Schengen visa. This should be stated in the consent form and can be checked using the short-stay visa calculator (https://ec.europa.eu/home-affairs/content/visa-calculator_en). Guidance for all countries should be checked in the planning stages (<https://www.gov.uk/foreign-travel-advice>).

The **European Travel Information and Authorisation Scheme (ETIAS)** that was due to come into force in 2022 has been delayed. Full British citizens will apply online in advance of their visit and a security check will be done before their arrival (similar to the ESTA requirement of the US). An ETIAS will be valid for three years from date of issue, with information stored electronically against passport details in the European Immigration system. The School will be looking to utilise this system once it comes into place although the exact timing of this is still unknown.

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Due to the changes to border regulations, the **British Council's list of travellers' visa scheme has ended**. Parents are responsible for all visa's and the School does not take part in obtaining visa's for pupils who require them for international travel. It is the trip leader's responsibility to ensure that they have copies of the visas for all pupils ahead of departure.

7.2 Planning

The level and detail of the planning of an educational visit will be dependent on the type and nature of the visit, whether it is for one day or involves over-night stays away from the School and the risks presented by the activities involved.

The degree of complexity of a particular plan or policy (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables are illustrated in the SAGED model on the Scope, Remit and Value section. Also refer to the National Guidance section on 5.2b Planning Basics.

Example Uppingham trips:

- Straightforward – House cinema trip or visiting a local gallery
- Enhanced Planning – Geography or biology residentials
- Complex needs and challenging environments – DofE Gold Assessed Expeditions

Planning should reflect the consideration of legal and good practice requirements, ensuring:

- The plan is based on Uppingham Employer Guidance and Procedures
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process
- Those in a position of parental authority have been fully informed and, where appropriate, formal consent has been obtained
- Proportionate assurances have been obtained from any providers (making full use of national schemes that accredit that assurances have already been obtained by credible inspection regimes)
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required
- All details of the activity provision are accessible to the emergency contact throughout the period of the activity

It's recommended that the staffing team identify the benefits and learning outcomes that the activity (or range of activities) might achieve at the very start of the process. If the outcomes are to be evaluated with any rigor, then it will be essential that these outcomes are prioritised, and appropriately targeted. A record of these outcomes will help keep the plan focussed and be part of the risk-benefit analysis.

All residential and complex day trips will require at least one pre-trip meeting to discuss the key aspects of the trip. A final meeting will take place once all planning is complete but leaving enough time for refinements if necessary. Notes will be recorded from the meeting by the EVC in Evolve.

7.3 Consent

All trips require communication of key aspects, with straightforward day trips this can usually be done through house teams (HsM, matron and/or tutor). Schools are not required to obtain consent from parents for pupils to participate in off-site activities in school hours and which are a normal part of a child's education. (Education Act 2002). Generic consent is given in the Uppingham parents' contract as follows:

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- 1 **School Trips:** A variety of school trips will be provided for your child while a pupil here. The cost of some school trips will be charged as an extra and added to the bill. Parents' prior consent will be sought for a trip incurring additional costs. School trips abroad or those in the United Kingdom involving an overnight stay will be the subject of a separate agreement with parents. The cost of the trip will be payable in advance. The pupil will be subject to the School rules in all respects whilst engaged in a School trip. All additional costs of special measures (such as medical costs, taxis, air fares, or professional advice) necessary to protect the Pupil's safety and welfare, or to respond to breaches of discipline, will be added to the bill.
- 2 **School Trips and Transport:** We consent to my/our child taking part in school trips which do not involve an overnight stay or travel abroad and I/we consent to my/our child being carried by public transport or school transport driven in a responsible manner by an adult who is suitably qualified and insured.

Visits that involve a cost added to the School Fees (greater than the discretionary amount published by the Bursar annually), those that involve higher risk activities, or a residential component, do require specific parental consent. The School will issue consent via Evolve and this will be tailored to the trip in question by the EVC. The consent form provides an opportunity to inform parents of the trip details and key risks as well as collate parent contact information and obtain an update on medical details.

Trip leaders should carry hard copies of consent forms on overseas trips as they may be required at boarder control. Further information regarding consent can be found in the National Guidance: [4.3d Parental Consent](#)

7.4 Inclusion

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

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

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

See National Guidance [3.2e Inclusion](#).

7.5 Behaviour

Pupils are expected to comply with School rules at all times. Parents and pupils must be informed, before the start of the visit, of the standards of behaviour that will be expected of the pupils whilst on the visit. Pupils whose behaviour causes the Trip Leader concern for the safety of either the individual pupil or the entire group may be withdrawn from the visit. On residential visits, the Trip Leader should consider whether such pupils should be sent home early. Parents and pupils should be told in advance of the visit the procedures for dealing with misbehaviour, how a pupil will be returned home safely and that parents etc. will normally be required to meet the cost of travel in such circumstances.

The Staff Code of Conduct and Staff Handbook (both found in the [Policies Library](#)) outline expectations of colleagues at work, including whilst on school trips.

7.6 Record keeping, safeguarding, data protection and GDPR

Trip leaders need to be aware of their responsibilities regarding data protection and the General Data Protection Regulation (GDPR), which is an element of the Data Protection Act 2018. Information collected about pupils and parents must pertain to the planning and delivery of the trip. Before sharing any details with a provider, their GDPR policies should be checked by our [GDPR Compliance Officer](#). Records should

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be kept in the central system, Evolve, wherever possible. Records should be disposed of appropriately at the end of the trip. The Evolve system will maintain an archive of trip information in line with the School's Data retention policy. In relation to 'safeguarding of children and individuals at risk', trip leaders are expected to contact the Houseparents and Assistant Head Safeguarding ahead of a trip.

Further information can be found in the national guidance: [4.4j Participant Information and Data Protection](#)

7.7 Social Media

Sharing trip highlights, celebrating achievements and promoting trips can be done using authorised social media accounts. Staff should not be using personal accounts or personal devices for these purposes. The Marketing Department will be able to advise on best practice in creating your own social media feed.

On most trips, it makes sense to allow pupils to carry their mobile phones should they need to contact the trip leader during periods of indirect supervision. It is worth briefing pupils on appropriate use of mobile phones, including social media. Pupils may want to post about exciting things that they and their friends are involved in; however, need to understand that they are representing the School and must social media within the [online safety and best practice guidelines](#).

It may be necessary to control pupils' access to mobile phones in certain circumstances. For example, to control pupil-pupil or pupil-parent communications in the event of a disciplinary or incident. These decisions should be sense checked by the school base contact (see [Emergency Planning](#))

7.8 Value and Evaluation

Uppingham recognises that educational visits can benefit pupils in that they can:

- Provide the opportunity to gain experiences not available in the classroom
- Enhance the pupils' understanding of curricular activities – languages, history studies etc.
- Develop and practice mental and physical skills – investigation, sports etc.
- Develop and encourage social skills – independence, team building, global citizenship

The Ofsted report, [Learning Outside the Classroom – How Far Should You Go?](#) (October 2008) makes statements in the strongest terms to support the value of LOfC, including the fact that it raises achievement.

However, it also highlights the finding that even where LOfC is highly valued and provided to a high standard, it is rarely evaluated with sufficient rigour – i.e. in the way that classroom learning is evaluated – and a methodology to address this is provided within the National Guidance document: [5.1c Self evaluation and the Ofsted framework](#)

An assessment of the trip value is part of the approvals process and trip leaders are encouraged to complete an evaluation form through the Evolve system following the trip. A summary of trips and a review of them in line with the National Guidance is completed annually. This is an important process to ensure future provision can develop and improve.

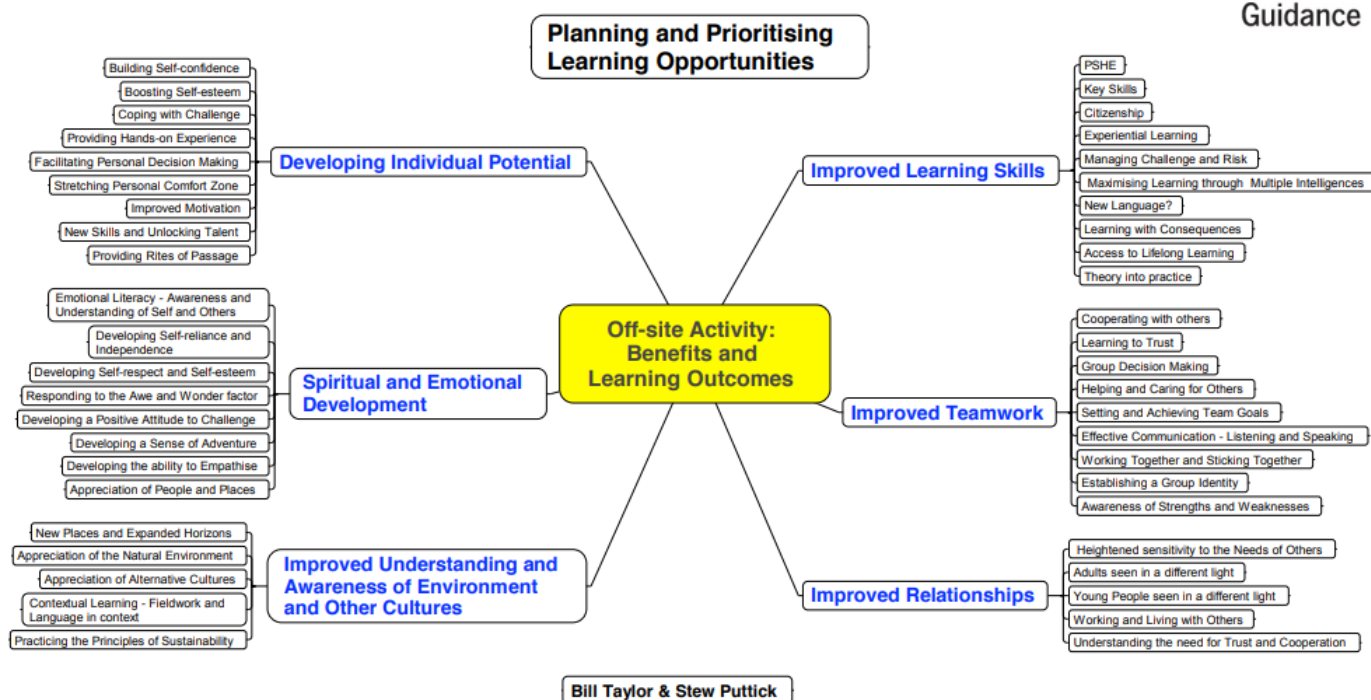


Figure 3: Benefits and learning outcomes, OEAP

8. Risk management and assessment

Refer to National Guidance document [4.3c Risk Management](#)

As an employer, Uppingham has a legal duty to ensure that risks are managed - requiring them to be reduced to an acceptable level. In terms of educational provision, we understand that there is a balance between the risk exposure and potential benefits. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring Uppingham to provide such support, training and resources to its employees as is necessary to implement this policy.

The **risk-benefit model** (further explained by [Professor David Ball](#)) puts the targeted benefits, learning outcomes or purpose of the trip at the front end of the process. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put in place) is acceptable. HSE endorse this approach through their [Principles of Sensible Risk Management](#) and stress that it is important that children are exposed to well-managed risks so that they learn how to manage risk for themselves. The DfE also make clear that they support this approach through their guidance on [Health and safety: responsibilities and duties for schools](#).

There is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to an individual or harm several people.

[HSE guidance](#) (2011) is clear that the focus should be on how real risks arising from such visits are managed and not on paperwork. There is a need for a proportionate and sensible approach to planning and organising off-site activities, the HSE's primary interest is real risks arising from serious breaches of the law. Risk assessments must be undertaken by the trip leader with the support of the EVC.

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Generic risk assessments exist for a wide range of trips and components of trips – accommodation, transport, theatre trips etc. These identify risks that will be the same or similar irrespective of the individual circumstances and remove the need to repeatedly assess the same or similar risks every time a risk assessment is carried out. Generic risk assessments are stored in the Evolve resources and on [UPPnet](#). Initially, the Trip Leader and other staff involved in the trip must review the generic risk assessments and identify and retain those recommended control measures that are appropriate to their specific visit. Those that are not relevant can be redacted.

Risks specific to the trip, not already considered in the generic risk assessments, need to be identified and recorded in the Evolve form. More complex trips (see SAGED variables in [Scope and Remit](#)) will have more details whilst simple day trips may state 'no further actions required'.

Following approval of the Evolve trip form, the trip leader must provide all members trip leadership team with an electronic copy and brief them fully on the risks identified and the control measures to remove or reduce the risks to the lowest levels practicable. Additionally, pupils should be provided with relevant information before the visit and during any subsequent briefings during the visit.

Trip Leaders and other staff on the visit must remember that risk assessment does not start or finish with those carried out prior to the visit and that they should be continuously reviewed throughout the visit and, where appropriate, revised to ensure they remain valid with respect to any changes in prevailing circumstances or conditions i.e. on-going or dynamic risk assessment. Where revisions are made, they should be recorded and disseminated to both staff and pupils.

See [Provider-led and Self-organised](#) visits for details on what to expect from an activity or tour provider.

8.1 Requirement to Ensure Effective Supervision

The trip leader must ensure the trip leadership team is suitable and sufficient to ensure effective supervision and management of the party. The School requires that for overseas trips that there must be a minimum of three staff and that in the case of mixed gender trips that there is a male and female member of staff. The Law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is effective. See National Guidance on [4.3b Ratios and effective supervision](#).

When considering supervision it is useful to refer to the SAGED variables (see [Scope and Remit](#)). The staffing should consider the mix of genders in the pupil group, competencies or qualifications to run any activities, and how incidents or emergencies might be managed. Consider plan B scenarios such as a member of staff being ill or needing to take an individual to hospital.

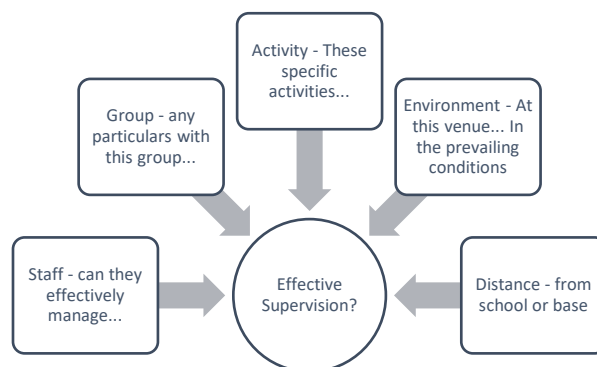


Figure 4: SAGED and effective supervision

Many trips will involve periods of **indirect supervision** which can greatly enrich the pupil's learning experience. These scenarios should be carefully considered at planning stages, and the experience should start small, consider confined spaces for a short period at time at first, giving pupils greater responsibility as trust and experience develops. The trip leader needs to dynamically assess and manage risks, a skill developed through the apprentice system.

Prior training, developing pupil experience and skills may be required for some activities or trips, such as DofE expeditions. This will need to be clearly recorded in the parental consent and risk assessment process.

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Swimming, paddling and other in-water activities should never be allowed as an impromptu activity. In-water activities should only take place when a specific risk assessment has been completed and qualified supervision is available (there is a trained life guard available to supervise the activity).

8.2 Transport

Transport will invariably be a key factor in any off-site activity or trip risk assessment. Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is more dangerous to travel to an activity than to engage in it. All national and local regulatory requirements must be followed. See the National Guidance [4.5a Transport general considerations](#).

Generic risk assessments exist for most modes of transport and are designed to give the trip leader a checklist so they can assess the hazards and risks arising from the chosen means of transport and ensure that suitable control measures are implemented to remove or reduce the risks to both staff and pupils.

- **School Minibus** travel is detailed in a separate policy (see [Driving and Vehicle Safety Policies](#)) and forms the most common mode of school trip and activity transport. Drivers must either be qualified and approved staff or engage one of the dedicated School Drivers. The latter is recommended where budget and availability permit.
- **Private cars** can be used where all other options have been considered as not practical. This is also detailed in the [Driving and Vehicle Safety Policies](#). Unplanned or emergency situations, such as taking a pupil to hospital, may require staff to use their own car but they must adhere to the School's policy requirements.
- **Coach hire** is a popular option for larger school trips and Uppingham has several coach firms that are used regularly and reliably. National Guidance provides some important recommendations [4.5e Hiring a coach](#).
- **Taxis** might be appropriate for in-trip travel or small-scale outings. A list of approved taxi firms can be obtained from the Health and Safety Manager.
- **Public transport** is recommended where possible, especially when visiting cities. Once again, this needs to be risk assessed and the most appropriate mode of transport selected.
- **Driving abroad** brings a whole range of considerations. There have been a number of coach crashes in recent years which reiterate the need for thorough provider checks and breaking up long journeys wherever possible. The School does not support self-driving abroad.

8.3 Accommodation

The trip leader must ensure that the accommodation provided on residential visits is suitable and safe to use. For example, pupils should not be expected to share a bed. Where practical, the trip leader should undertake a preliminary visit of the planned accommodation. It is not always possible to do this for overseas accommodation. This should be organised through an approved, recognised organisation which has itself vetted the accommodation.

When camping or other outdoor accommodation is used the activity should be appropriately risk assessed and include pupil training or supervision by appropriately qualified staff where appropriate. The EVC will be able to advise on appropriate protocols depending on the context and parents are expected to provide their consent for such activities.

Pupils 'billeted' with host families on overseas trips can simply be an inexpensive form of accommodation but can also be integral to the rich learning experience, on language exchanges and sports tours for example. The equivalent of DBS checks is unlikely to be available in many countries. Trip leaders must ensure there is a thorough process of selecting and vetting host families. If an establishment is involved with the arrangements (including if it uses a third-party provider, such as an agency, to make the arrangements) then it is responsible for taking all reasonable steps to ensure that the homestay setting is suitable and to minimise the risk of harm to young people. Where an exchange visit or homestay is arranged for the first time, a preliminary visit is recommended. Visit Leaders should ensure that the overseas host establishment,

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or agency, has a vetting procedure in place to assess the suitability of home placements. Parents should be fully informed about the nature of this vetting. The National Guidance provides a detailed checklist for the running of [7f Exchanges and home stays](#).

8.4 Preliminary Visits

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third-party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people and is a vital component of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. The EVC will advise on this in each specific case. A pre-visit is usually required for visits where there is a high complexity factor and the visit has not happened previously, or when the visit is adventurous and led by Uppingham staff.

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

8.5 Adventure Activities

Uppingham acknowledges the immense educational benefits that adventurous activities can potentially bring to young people, and fully supports and encourages adventurous activities that are correctly planned, managed, and conducted. Competences to lead outdoor activities should be demonstrated by holding the relevant National Governing Body (NGB) qualification, where it exists. Where there are queries regarding the competencies/experience required, the EVC will contact outdoor professional networks for advice. All centres and providers used by the School for the provision of adventure activities will hold a current AALA licence.

Below is a list of activities that are considered adventurous, requiring additional checks to ensure NGB accreditation or qualification of leaders.

- All activities in 'open country' such as DofE Expeditions*
- Swimming (all forms, excluding publicly life guarded pools)
- Camping where participants/leaders erect tents and/or self-cater
- Bush craft
- Canoeing / kayaking
- Sailing / windsurfing / kite surfing
- Rafting or improvised rafting
- Use of powered safety/rescue craft
- All other forms of boating (excluding commercial transport)
- Fishing in hazardous environments (for example: sea, fast rivers, on deep water)
- Water skiing
- Snorkel and SCUBA diving activities
- Hill walking and mountaineering
- Road cycling and mountain biking
- Abseiling and rock climbing (including indoor climbing walls)
- River/gorge walking or scrambling
- Coastering/coastal scrambling/sea level traversing
- Underground exploration (Except designated 'Show' caves)
- Shooting, Paintball (including 'Laser Quest') and archery
- Skiing, snowboarding, and related activities (including dry slope)
- Air activities (excluding commercial flights)
- Horse riding
- Motor sport – all forms
- High level ropes courses

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- ‘Extreme’ sports (Parkours, Bungee, Zorbing, Mountain or ATB Boarding etc.)
- Other activities (e.g. initiative exercises) involving skills/risks inherent in any of the above

* ‘open country’ is normally defined as any place which is moorland (open uncultivated land at any height above sea level) or on a mountain above 600m and from which it would take more than 30 minutes travelling time to walk back to an accessible road or refuge.

Please note that this list is not exhaustive and other activities involving skills and risks inherent to any of the above may also be deemed adventurous. For example, visits to industrial recycling centres, or field study activities which require access to water.

9. Finance, charging for trips and insurance

The trip leader is responsible for managing the finances of an educational visit. For guidance on managing the finances please see [Managing the Finances of a School Trip](#). All educational visits should break-even, so that all costs should be fully recovered by pupil recharges. The trip leader is responsible for the identification of the costs of all aspects of their proposed visit or trip. They should ensure the negotiation of best terms and conditions with travel, transport, accommodation, activity providers etc. including the provision of appropriate refunds in the event of trip cancellation. Usually, agreements are to be made between the provider and Uppingham, not the pupils’ parents. Informing parents and pupils of the cost of the visit is also the responsibility of the trip leader.

Any trips involving competitive elements (e.g. ski racing, sports tours) need to be checked with our insurers through the Finance Director. Residential trips will require more comprehensive budget planning and use the approved [budget template](#). Discussing requirements with the Bursary from the outset is important in determining the key financial considerations. For example, it might be appropriate for the trip leader to have a school credit card which would offer contingency funds whilst on the trip.

9.1 Insurance

Employer’s Liability Insurance is a statutory requirement and Uppingham have arranged a policy that will respond and, if appropriate, indemnify against all claims for compensation for bodily injury suffered by any person with a contract of employment. This cover can be extended to those persons who are acting in an authorised voluntary capacity, by arrangement with the Finance Manager.

Uppingham also holds **Public Liability insurance**, which will indemnify the school against all claims for compensation for bodily injury to pupils or members of the public, as well as for the accidental loss of, or damage caused to, third party property as result of the School’s activities. Employees are indemnified against all such claims and this can be extended to volunteers by arrangement with the Finance Manager.

The School also holds comprehensive **travel insurance** for staff and pupils on overseas trips by arrangement with the Finance Manager. The trip leader must inform the parents of all pupils involved in the educational visit about the insurance arrangements. The trip leader must liaise with the Finance Director to ensure all activities and pupils are covered by the school’s insurance. It is particularly important if pupils have any pre-existing medical conditions.

Where the educational visit is to a country within the European Economic Area (EEA) pupils must have either a European Health Insurance Card (EHIC) which permits free or reduced charge medical treatment in member countries or the new **UK Global Health Insurance Card (UK GHIC)**. Applications should be made [online](#). Travel to Switzerland, Norway, Iceland or Liechtenstein, may require the ‘new EHIC’ rather than the ‘UK GHIC’ and this should be checked before departure.

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The School does not provide travel insurance for educational visits in the UK. Staff and pupils undertaking educational visits in the UK should provide their own travel insurance if they wish. The trip leader must advise all those going on the trip to only take those personal belongings with them that are essential for the visit or trip being undertaken.

10. Health and medical

Staff or pupils may have health issues that, should they occur during the trip, may require emergency treatment or have an impact on the proposed programme. Trip leaders should ensure that appropriate medical and health information for both staff and pupils is identified in the planning stages.

Pupil medical information stored on PASS is available through Evolve and Report Server. The trip leader must also liaise with house teams (Houseparent's and Matron) to check if there are any sensitive medical or pastoral issues that the trip leadership team should be aware of. For residential trips, parents will need to consent to trip leaders making medical decisions in the event of an emergency.

Discussing requirements with Woodfield Health Centre (WHC) from the outset is important in determining the key health considerations in any overseas trip. The participation of pupils of staff with additional health needs should be included in the trip risk management planning. Higher risk medical concerns may need further risk management measures to be taken and the appropriate care plans obtained.

All staff have basic first aid training; however, some trips such as those involving adventurous activities or in remote areas may require staff to enhance their first aid qualifications. First aid kits and relevant over-the-counter medicines can be issued by Woodfield Health Centre. It is the responsibility of the trip leader to ensure appropriate handling and administration of medicines and first aid supplies.

10.1 Emergency Contacts

The trip leader must ensure that they have emergency contact details for the parent/guardian of each pupil participating in the trip. Staff accompanying the trip should also ensure the trip leader has an emergency home contact for them. These can often be obtained using the Evolvego system and/or through the student information section of report server.

11. Emergency Planning

Refer to National Guidance document: [4.1i Emergencies and Critical Incidents](#). As an employer, Uppingham is committed to providing planning procedures to manage incidents and emergencies. This policy considers incidents and emergencies in four categories:

Incident: a situation which can be dealt with by the staff on the trip. This may involve communication with a base contact or to parents, but the trip leader remains in control of the situation. An event which could cause harm to members of the group or expose them to risk or danger, irrespective of the outcome but without any injury being suffered.

Incidents should be reported to the base contact and the details recorded to enable the identification of potential causes and the development of policies etc. to prevent a similar reoccurrence in the future.

- **Emergency:** an incident that requires the immediate support of the base contact, initiating the '[emergency plan for off-site visits](#)', managed by the base contact.
- **Significant incident:** beyond control of the trip leader and base contact alone, initiating the School's '[significant incident plan](#)'.
- **Major incident:** initiating the relevant Local Authority's Major Incident Plan, led by the Police or relevant authorities outside the UK.

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The base contact role varies in and out of term time. **Lower risk day trips** can use the EVC or Assistant Head Co-Curricular as points of contact in school. If the situation requires escalation, the ELT member on duty should be contacted (07706 295641). Trip details can be accessed via Evolve using the diary icon from the home screen. Term time trips are generally less complex, closer to school and have access to a greater support framework: other colleagues might be available to join the trip at short notice, the Health Centre is contactable and Houseparents can liaise with parents if required.

During the holidays there are two senior members of staff on call for all trips. This includes a specific member of staff from the school safeguarding team. They must be:

- competent to fulfil their role including working effectively in a crisis
- familiar with the procedures and have access to key information
- appropriately briefed and have support, training and practice as required
- contactable 24hrs a day and capable of returning to school immediately if required

This is discussed at leadership team meetings in good time before the holidays, putting together a schedule of who is in Uppingham during school holidays. Spreading responsibility as appropriate, to avoid overly relying on those who work through the holidays and using multiple colleagues to cover longer breaks.

The EVC provides the school contact with access to all key information, as a hard copy as well as electronically. In discussion with the EVC, trip leaders should have clear procedures for an incident or emergency. Including:

- Whole group evacuation / repatriation
- Contingency funding arrangements
- Getting support out to the group

Support departments such as admissions and porters are reminded of procedures and contacts over the holidays as they may be the first point of contact in an incident or emergency. The emergency school contact number can be given to tour providers to use in their critical incident protocols. However, this number should not be given to parents. Parents can contact the trip leader directly via the trip phone or the leader's email.

Trip Leaders, staff and adult volunteers participating on a School Trip, must identify an adult e.g. their spouse, partner, relative, friend etc. to act as their Home Emergency Contact in the event of accident, illness etc.

In the event of an accident or incident involving a pupil, the School's Emergency Contact and not the Trip Leader should contact parents or guardians. Where possible, the Trip Leader should ensure that pupils do not contact their parents until such time as the School's Emergency Contact has been able to do so.