

EDUCATIONAL TRIPS AND VISITS POLICY

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1. Introduction

- 1.1 Educational visits and trips are integral to Oakham's Connected Curriculum. Some visits are essential for the students' academic study; others aim to enhance the students learning experience and understanding.
- 1.2 Oakham School has a long and successful history of providing a range of trips and visits to young people including outdoor and adventurous learning activities. The benefits of these activities for participants are numerous and include:
- Increased levels of trust and opportunities to examine the concept of trust (us in them, them in us, them in themselves and them in each other)
 - Involvement in activities leading to greater academic and vocational learning encouraging participants not passive consumers and where a wide range of learning styles can flourish.
 - Enhanced opportunities for 'real world, learning in context' and the development of the social aspects of intelligence
 - Increased risk management skills through opportunities for involvement in practical risk benefit assessments ('what do we want to do and what do we need to do to make it safe enough?') Giving learners the tools and experience necessary to assess their own risks in a range of contexts.
 - Opportunities to practically examine the components of challenge (i.e. chance of gain or benefit/risk of loss or harm/accurate goal setting and judgement/willingness an commitment/activity outside the comfort zone – physical and/or emotional
 - Greater sense of personal responsibility.
 - Enhanced emotional intelligence.
 - Possibilities for genuine team working including enhanced communication skills
 - Improved environmental appreciation, knowledge, awareness and understanding including opportunities to interact with a wild environment.
 - Improved awareness and knowledge of the importance and practices of sustainability in the modern world.
 - Physical skill acquisition and the development of a fit and healthy lifestyle.
- 1.3 Oakham School supports its staff in organising educational visits and trips with an Educational Visits Co-ordinator (EVC), a Deputy EVC and other experienced staff who provide guidance and assistance throughout the planning and delivery of all levels of trip. Advice, support and guidance can also be found for all involved in Trips at the following address: <http://oeapng.info/guidance-by-role/>

2. Roles and Responsibilities

Oakham School has adopted National Guidance for the management of outdoor learning, off-site visits and learning outside the classroom. This guidance can be found at www.oeapng.co.uk. It is a legal expectation that Oakham School employees must work within the requirements of the employees' guidance and should follow National Guidance recommendations.



- 2.2 Under the Health and Safety at Work Act (1974) the duty of care for students on an educational visit ultimately rests with the Headmaster and Chair of the Trustees, as in normal school. This responsibility for educational visits is delegated to the Deputy Head Co-Curriculum who acts as the School's Educational Visits Co-ordinator (EVC). The EVC is supported by the Deputy EVC and the Director of Adventure.
- 2.3 The Deputy Head Co-Curriculum **Educational Visits Co-ordinator's** Duties are:
- Approve all trips prior to inclusion in the Red Book to determine that they are relevant, appropriate, do not clash with another trip of a similar nature/destination and are being led by a competent, experienced member of staff.
 - Act as the emergency point of contact at School for any trip leaders/tour operators or delegate to a designated member of the SLT.
 - Review all risk assessments for all level 2 & 3 trips, meet with Trip Leaders and teams of Overseas/Residential/Adventurous trips.
 - To meet with trip leaders to debrief after trips when required.
 - Monitor and update the Educational Visits Policy annually.
 - Provide guidance on the School's expectations in terms of pupil supervision, behaviour expectation and individual's needs on trips and visits.
- 2.4 The **Deputy EVC's** Duties are:
- Approve all low-level trips ensuring that they are relevant, appropriate, do not clash with another trip of a similar nature/destination and are being led by a competent, experienced member of staff.
 - Review all risk assessments for all trips, meet with Trip Leaders and teams of Overseas/Residential/Adventurous trips
 - To meet with trip leaders to debrief after trips when required.
 - Monitor and update the Educational Visits Policy annually in consultation with the EVC.
- 2.5 The **Director of Adventure's** Duties are:
- Oversee all Duke of Edinburgh and Combined Cadet Force activities.
 - Provide guidance and assistance with planning on adventurous trips.
 - Review risk assessments for Level 3 trips with the Deputy EVC.
 - Advise trip leaders on best practice.
- 2.6 The **Visit/Trip Leader's** Duties are:
- Plan the trip and manage all educational and safety aspects prior to and during the trip.
 - Give adequate notice to students, parents, Housemasters and Housemistresses, the Bursary and related Support Departments.
 - Ensure all staff assisting with the trip are fully briefed of the RA.
 - Ensure all students are fully aware that school rules apply to the trip.
 - Ensure they have the appropriate First Aid qualification to lead the trip.
 - Be prepared to intervene prior to or during a trip if they consider students' safety to be at risk.
 - To always have a Plan B activity if the planned activity cannot take place safely.



3. Risk Management

- 3.1 As an employer and with a duty of care to its staff and students, Oakham School has a legal duty to ensure that trips and any associated risks are managed – requiring them to be reduced to an acceptable or tolerable level and not to eliminate risks, as would be a reasonable expectation when risk assessing a piece of machinery, workshop or manufacturing process. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring Oakham School to provide such support, training and resources to its employees and students as is necessary to implement this policy.
- 3.2 The risk management of an activity should be informed by the benefits to be gained from participating. Particularly when planning adventurous trips, Oakham School promotes a 'risk benefit assessment' approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. 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. The Health and Safety Executive (HSE) endorse this approach and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves:
(<http://www.hse.gov.uk/services/education/school-trips.pdf>)
- The Department for Education also supports this.
(https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/335111/DfE_Health_and_Safety_Advice_06_02_14.pdf)
- 3.3 It is a requirement that Oakham School produce a risk assessment for all educational visits, identifying suitable and sufficient control measures for any significant risks i.e. those that may cause serious harm to an individual, or harm several people.
- 3.4 Oakham School risk assessment templates are provided on the Trips and Visits online approval system (Evolve). These are to assist staff covering a wide range of trips and components such as transport, group travel and terrorism for theatre trips etc. These are available under the resources tab. Staff are then expected to adapt them to suit their specific trip. Staff must use the most up to date template when planning a trip.

4. Planning

- 4.1 There are four levels of educational visit at Oakham School that all require different levels of planning:
- 4.1.1 **Level 0 (Local House / Tutor meal outings)**. Example: A local trip into Oakham or within a 5-mile radius of the school (for e.g. to a restaurant in Oakham or Barnsdale)
- Requirement:
- Check the Red Book to ensure no clashes are going to occur (Permission from the EVC does not need to be sought).
 - If the activity is outside of normal school hours or a parental contribution is required, then parental consent must be sought.
 - Trip Leader to enter trip as a local area visit on Evolve.



- Due to the close proximity of the School grounds, Trip Leaders are not required to adhere to the staffing ratios at section 9, but they must ensure accompanying pupils have correct contact information for the relevant HMs and EVC in case of an emergency.
- Ensure all staff on trip are briefed on arrangements, this must include being given a copy of the itinerary, list of pupils and relevant medical conditions, and all risk assessments.

4.1.2 **Level 1 (Day Trip within the UK (Non-Adventurous))**. Example: Theatre/museum trip, House/Tutor outing, event at another School, visit to venue/activity away from Oakham such as Laser Force or Gravity Trampolines.

Requirement:

- Trip added to Red Book planning calendar to await approval at Red Book planning meeting where possible. If the trip is arranged after the Red Book has been finalised, then approval should be sought from the Deputy Head Co-Curriculum as soon as possible in the knowledge that existing Red Book entries may well be given priority.
- Trip Leader to enter trip as an event on Evolve as soon as trip has been agreed by Senior Deputy Head and ensure all relevant steps have been completed.
- Trip Leader to ensure correct risk assessment is completed/updated and medical information sought.
- Ensure all staff on trip are briefed on arrangements, this must include being given a copy of the itinerary, list of pupils and relevant medical conditions, and all risk assessments.

4.1.3 **Level 2 (Adventurous Trip or Residential Trip in the UK)** Example: Academic trip, department trip requiring overnight stay, Science Museum sleepover, DofE expedition etc.

Requirement:

- Trip approval form to EVC two terms in advance.
- Trip Leader to meet with Finance Department to agree costs.
- Trip added to Red Book planning calendar to await approval at Red Book planning meeting.
- Trip Leader to enter trips as an event on Evolve at least four weeks prior to departure.
- Trip Leader to ensure the event form on Evolve has completed details at least two weeks prior to departure and ensure all relevant steps have been completed.
- Trip Leader to ensure correct risk assessment is completed/updated and medical information sought.
- Ensure all staff on trip are briefed on arrangements. This must include being given a copy of the itinerary, list of pupils and relevant medical conditions, and all risk assessments.

4.1.4 **Level 3 (Overseas Adventurous Trip / Overseas Residential Trip)** Example: Skiing, travel to developing countries, overseas DofE expedition, dive trip etc



Requirement:

- Trip outline approval form to Senior Deputy Head one year in advance with anticipated levels of pupil interest.
- Trip Leader to meet with Finance Department to agree costs.
- Trip added to Red Book planning calendar to await approval at Red Book planning meeting.
- Meeting with EVC two terms in advance of trip to confirm arrangements.
- Trip to be entered onto Evolve at least one term prior to departure.
- Consent forms collected for all pupils 36 weeks prior to trip departure.
- Trip Leader to ensure all sections of Evolve are completed, including a correct risk assessment and medical information sought in good time prior to departure.
- Arrange a pre-departure meeting with EVC, Deputy EVC and team to Ensure all staff on trip are briefed on arrangements, this must include being given a copy of the itinerary, list of pupils and relevant medical conditions, and all risk assessments.

4.2 **Duke of Edinburgh Award (DofE)**

Requirement:

- Trip outline approval form to Deputy Head Co-Curriculum one year in advance with anticipated levels of pupil interest.
- Trip added to Red Book planning calendar to await approval at Red Book planning meeting.
- Meeting with EVC & Director of Adventure two terms in advance of trip.
- Where necessary, arrange a preliminary visit prior to trip departure (See Sub Section 5 Preliminary visits)
- Consent forms collected for all pupils six weeks prior to the trip departure.
- Trip Leader to ensure all sections of Evolve are completed, including a correct risk assessment and medical information sought in good time prior to departure.
- Arrange a pre-departure meeting with DofE Manager.
- Carry out a pre-departure briefing for all staff going on the trip. This must include being given a copy of the itinerary, list of pupils and relevant medical conditions, and all risk assessments.
- Dynamic risk assessment to be carried out during expedition, considering changing weather conditions, groups' ability, etc.

DofE trips can require varying levels of supervision depending on whether they are practice or assessment expeditions. Full details containing the level of supervision should be included in the risk assessment, but the definitions are listed below.

Direct Supervision - Groups are under direct supervision when participants are always accompanied by a competent group leader.

Close Supervision - Groups are under close supervision if the group is within sight or hearing of a competent group leader who can readily intervene if required.

Remote Supervision - Groups are under remote supervision where they are not under the direct or close supervision of a competent group leader. Groups are also considered to be under remote supervision if they are accompanied by an adult who has not been assessed as competent to fulfil the role of group leader.



County regulations do not permit wild country walking under remote supervision in “mountain walking” or “climbing” terrain. Only “Hill-walking terrain” is permitted for remotely supervised groups.

Note: it is good practice for DofE groups under training that a progressive relaxation from direct to close to remote supervision takes place provided that adequate time is devoted to teaching the key expedition skills.

As part of the Evolve consent process, informed consent must be obtained from parents and guardians if pupils are to be remotely supervised during a trip.

- 4.3 Planning should reflect the consideration of legal and best practice requirements, ensuring:
- The plan is based on Oakham School procedures and employer guidance.
 - 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 consents have been obtained.
 - Proportionate assurances have been obtained from any providers
 - 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.
- 4.4 It is a requirement that at a very early stage of the planning process, the provisional staffing team carry out a brain-storming exercise in order to identify the benefits and learning outcomes that the activity (or range of activities) might achieve. 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 on the Risk Assessment will help keep the plan focussed and are a vital part of the risk management process in providing some objectivity in a “Risk Benefit Analysis”.
- 4.5 This supports the move towards developing activity-specific policies at establishment level for regular or routine activities. Such policies should be robust and equate to “*operational guidance*” that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality.
- 4.6 Staff may wish to use the standard checklist for organising a trip (see appendices). 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 can be remembered as “**STAGED**” as explained below:
- **Staffing requirements** – Trained? Experienced? Competent? Ratios
 - **Transport** – Reputable company/ Correct driving licences? Registered on Transport Manager? Safe vehicle, MOT etc?
 - **Activity characteristics** – Specialist? Insurance issues? Licensable?



- **Group characteristics** – Prior experience? Ability? Behaviour? Special and medical needs?
- **Environmental conditions** – Like last time? Impact of weather?
- **Distance from support mechanisms in place at the home base** – Medical? Transport? Residential?

4.7 **Combined Cadet Force (CCF)**

4.7.1 **Planning and Approval Process:**

Requirement:

- Trip outline approval form to Deputy Head Co-Curriculum one year in advance with anticipated levels of pupil interest.
- Trip added to Red Book planning calendar to await approval at Red Book planning meeting
- Meeting with EVC & CCF Contingent Commander two terms in advance of trip.
- For Army Cadets: Army Cadet Safety Management System (ASMS) documentation to be initiated and maintained throughout planning.
- For RAF Cadets: Air Training Corps Safety Management System (ATCSMS) documentation to be initiated and maintained throughout planning.
- Trip Leader to ensure all sections of Evolve are completed, including correct risk assessment and medical information sought in good time prior to departure.
- ASMS/ATCSMS Competent Person to be designated and involved in all planning stages (as appropriate for the activity).
- All activities must align with relevant service-specific safety instructions, standing orders, and regulations.

4.7.2 **Pre-Departure Requirements**

- Arrange pre-departure meeting with all staff and section leaders to ensure everyone is briefed on proposed arrangements.
- All staff must be provided with:
 - Copy of itinerary
 - List of pupils and relevant medical conditions.
 - All risk assessments and ASMS/ATCSMS documentation
 - Command structure and communication protocols.
 - Emergency contact details and procedures.
 - ASMS Safety Case (Army) or ATCSMS Safety Assessment (RAF) to be completed where required.
 - Dynamic risk assessment protocols to be established for ongoing assessment during the trip.

4.7.3 **Supervision Levels for CCF Activities**

CCF activities operate under the following supervision frameworks in accordance with ASMS (Army) and ATCSMS (RAF) guidelines:

Direct Command: Activities where pupils are under the immediate command and control of a qualified CCF instructor, maintaining visual contact at all times.



Indirect Command: Pupils operating under the general supervision of qualified staff with established check-in procedures and defined boundaries.

Progressive Training: As cadets develop competence, supervision may be gradually reduced through structured progression, allowing increased responsibility within clearly defined parameters.

Note: All supervision levels must comply with ASMS/ATCSMS competency requirements and service-specific safety instructions. High-risk activities require enhanced supervision protocols:

- *Army Section: fieldcraft exercises, weapons training, adventurous training*
- *RAF Section: airfield activities, aviation studies, flight simulation, air experience training*

4.7.4 Planning Principles

- Planning should reflect legal requirements, ASMS (Army) and ATCSMS (RAF) protocols, and good practice, ensuring:
- The plan is based on Oakham School procedures, relevant service safety management systems, and employer guidance
- All staff (including adult volunteer helpers) and cadets understand their roles, responsibilities, and command structure appropriate to their section
- Parents/guardians have been fully informed and formal consents obtained
- Proportionate assurances obtained from external providers/training areas/airfields
- 24/7 emergency contacts identified with access to all activity details
- Service-specific reporting procedures clearly understood (ASMS for Army, ATCSMS for RAF)
- All activities comply with relevant service training safety regulations:
- Army Training Safety Regulations (ATSR) for Army Section
- Air Cadet Organisation Publication 16 (ACOPS 16) for RAF Section

4.7.5 Learning Outcomes and Benefits

Early in planning, the CCF team must conduct a comprehensive review to identify:

- Educational benefits and learning outcomes specific to combined service objectives
- **Army Section:** Development of military skills, fieldcraft, and tactical awareness
- **RAF Section:** Aviation studies, aerospace technology, and air power appreciation
- Character development opportunities (leadership, teamwork, resilience, service ethos)
- Career insights into military and related professions (both ground and aviation)
- Physical and mental development through service-specific challenging activities

These outcomes must be prioritised, targeted, and recorded on risk assessments to maintain focus and support risk-benefit analysis within the ASMS framework.

4.7.6 Activity-Specific Policies

CCF maintains robust policies equivalent to operational guidance for:

- Annual camps and training weekends (Army and RAF specific)
- Ceremonial events and parades (joint service and individual)



- Adventurous training activities (both services) • Leadership and field exercises (Army focus)
- Aviation activities and air experience training (RAF focus)
- Competition and sports activities (inter-service and joint)
- Range activities and weapons training (primarily Army)
- Airfield visits and flight observation (RAF specific)

4.7.7 Variables Framework (STAGED-M)

CCF planning must consider these variables using the enhanced STAGED-M framework:

S - Staffing requirements:

- ASMS (Army) and ATCSMS (RAF) competency levels and qualifications
- Service-specific instructor-to-cadet ratios.
- Section leader experience in their respective service specialisations
- Joint activity coordination between sections

T - Transport:

- MOD transport regulations compliance (both services)
- Civilian transport approval procedures
- Journey management plans (JMPs)
- Special considerations for airfield visits and transfers

A - Activity characteristics:

- Army-specific: field exercises, tactical training, weapons handling
- RAF-specific: airfield operations, air experience flights, aviation technology
- Joint activities: parades, adventurous training, competitions
- Service equipment usage protocols.

G - Group characteristics:

- Cadet experience levels and service-specific grades/ranks.
- Service-specific medical considerations and clearances.
- Uniform and equipment standards for each service.
- Integration of Army and RAF cadets in joint activities

E - Environmental conditions:

- Weather impact on field training and aviation activities
- Airfield-specific environmental factors (RAF)
- Training area hazards and restrictions
- Seasonal considerations affecting activities.

D - Distance from support:

- Proximity to medical facilities
- Communication systems availability (including aviation frequencies)
- Transport and logistical support arrangements.
- Service-specific emergency protocols.



M - Military and Aviation-specific factors:

- Chain of command protocols (joint and service-specific)
- Security considerations and briefings
- Integration with regular forces (Army and RAF)
- Aviation safety requirements and clearances
- Airspace restrictions and NOTAMs (Notices to Airmen)
- Inter-service cooperation and protocol adherence

5. Preliminary Visits

- 5.1 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. It is a vital dimension of risk management.
- 5.2 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 Oakham School staff, for example a new DofE walking route.
- 5.3 Residential trips, visits abroad, exchange visits and adventurous trips led by school staff all have aspects of complexity. If the visit is led and managed by an external provider, then a variety of approaches can reduce the need to pre-visit.

6. External Providers

- 6.1 An 'External Provider' is defined as where there is an element of instruction, staffing, or guiding from an agency external to the School, for example: activity centre staff, ski company instructors, educational tour operators etc. For the purposes of this policy, an External Provider does not apply to youth hostels (where accommodation only is used) campsites, museums, galleries, or tourist attractions such as theme parks, farms and sea life centres.
- 6.2 The decision about the use of an external provider is the responsibility of the trip leader and the EVC. Trip leaders should consider the requirements under 'best value' and 'safety record' when selecting an external provider. To confirm that all aspects of the operation of the provider are satisfactory, the trip leader must ensure that the external provider holds either a Learning Outside the Classroom (LOtC) Quality Badge www.lotcqualitybadge.org.uk or is listed on www.kaddi.com. For any adventurous training activity, the external provider should be registered with the [Adventure Activities Licensing Authority](http://www.adventureactivitieslicensing.gov.uk) (AALA) meaning the Health and Safety Executive (HSE) has inspected the provider to ensure they follow good safety management practices.



- 6.3 A pre-visit and recommendation from previous users should always be used to help the trip leader decide on its suitability. In some instances, for example where a trip leader intends to use an 'external', voluntary individual for services, the person should be regarded as a temporary member of staff and must have all the relevant safeguarding and qualification checks conducted. The above procedure is not sufficient for Overseas Expeditions (i.e. those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable and must be discussed with the EVC.

7. Notification and approval of activities, trips and visits

- 7.1 All visits at or below level 1 can be approved by the Deputy EVC. All trips above level 1 are approved at Deputy Head level. All School trips must have a named leader who must be a serving teacher at Oakham School. Whilst Trip Leaders may use administrative support for completing Evolve forms, they must have checked all relevant information prior to uploading.
- 7.2 Notice of UK day trips must be given at the Red Book planning meetings to ensure clashes are avoided and to manage the balance of visits against School work and other commitments wherever possible. Where responsibilities and functions are delegated, this must be made clear to the EVC prior to trip approval.
- 7.3 Sport fixtures and trips as part of the weekday activities programme are approved by the Director of Sport and Director of Adventure.
- 7.4 All trips must have a completed risk assessment and must use the appropriate generic risk assessment form found in the resources section on Evolve. When adapting the appropriate generic risk assessment, Trip Leaders must ensure that they make them specific for their trip.
- These must be reviewed and signed by the Trip Leader and accompanying staff, making sure they are appropriate to the trip and that all are clear on their contents.
 - Overseas/residential trips must complete a more detailed risk assessment, using generic templates available on Evolve but making them specific to the trip.
 - Adventurous activity trips must plan a detailed risk assessment in conjunction with the Deputy EVC. If a trip involves manual labour (e.g. Kenya and India helping to "build" schools/toilets etc.), a risk assessment must be made of all equipment likely to be used. Advice should be sought from the H&S Manager and where appropriate the Head of Design and Technology as to the safety and appropriateness of the equipment.
 - When a trip has an adventurous activity as part of the trip, the relevant insert must be included and is available in the resources section of Evolve (e.g. DofE Risk Assessment Insert).

8. Assessing Competence

- 8.1 Approval should never be assumed but must involve professional judgement. The Deputy Head Co-Curriculum (EVC) must make a judgement about the suitability of any person's suitability to lead a group on any given visit/activity in an environment.
- 8.2 The competence of the Trip leader is the key component in ensuring the safety of the participants. Assessment, training and support of Trip leaders is a priority of the EVC. OEAP Guidance provides clear advice regarding the assessment of leader competence and is followed when Trip Leaders submit an approval form.



- 8.3 Approval of Leaders (OEAP guidance) - Employers should have clear processes for approving Leaders to lead visits or activities. This should ensure that Leaders are accountable, confident, and competent to lead the specific visits or activities for which they are approved.
- 8.4 Being accountable means that the Leader has been engaged through an appropriate recruitment process, which includes vetting and induction into the establishment's policies and procedures. The details of this process may depend upon whether the Leader is employed, contracted or acts as a volunteer, but in all cases should be thorough. Regardless of a Leader's employment status, they should understand the chain of accountability, what is expected of them, and the establishment's policies and procedures.
- 8.5 Being **confident** includes Leaders having the ability to take charge of a situation while being aware of, and understanding, their abilities, as well as their limitations.
- 8.6 Being **competent** means that the Leader has demonstrated the ability to operate effectively and has sufficient relevant experience and knowledge of the activities, the group, and the environments in which the visit will take place.
- 8.7 Competence is a combination of skills, knowledge, awareness, judgement, training, and experience. It is not necessarily related to age or position within the establishment. It is situational – a leader who is competent in one activity or environment may not be so in another, and it involves breadth as well as depth.
- 8.8 Relevant experience is not necessarily gained by repeating the same thing several times, but by experiencing a range of different activities and environments.

For adventure activity leaders, competence is best demonstrated through:

- Holding a National Governing Body leadership/coaching award at an appropriate level, or
- Being "signed off" by a suitably qualified Technical Adviser appointed by the employer.

- 8.9 For further information about appropriate technical qualifications, to lead or advise on specific adventure activities, staff should use the [Technical competence - qualification matrices](#) produced by the Adventure Activities Licensing Authority (AALA).
- 8.10 Based on their experience, the EVC decides which of four levels (assist, lead day, lead residential, lead residential overseas) the member of staff can operate at. It is an expectation of the Oakham School Policy that all leaders and assistants have been assessed as competent to undertake such responsibilities, either by attending trips before or shadowing more experienced trip leaders on a previous trip.

For Competence in Adventurous Activities – see appendix 1 for list

- 8.11 To be 'competent' also includes having up-to-date specific First Aid, EpiPen and Minibus driving qualifications. Higher level First Aid training may also be needed, depending on the activity. Training requirements in these areas should be identified as part of the Trip Approval form. MIDAS Minibus training is completed through the School Transport Manager. First Aid training is organised through the Health & Safety Manager, and EpiPen training is organised through the Medical Centre Manager. Records of all staff First Aid training are updated regularly and are accessible through the school information system. Regular First Aid training takes place throughout the school year.



- 8.12 For any trip, the Trip Leader will give a full briefing to the staff accompanying the trip prior to departure in case circumstances require them to take over the management of the trip.
- 8.13 A pre-trip meeting with the whole team must take place before every overseas / adventurous trip. This will be organised by the trip leader.

9. Staffing and Supervision

- 9.1 There is no legislation defining exact requirements for the supervision of students on school trips. Staffing ratios for visits are difficult to prescribe as they will vary according to the activity, age, group, location and the efficient use of resources. However, the school has adopted the ratios outlined below. Any deviation from these ratios **MUST** be authorised by the EVC.

Day trips to (for example) local historical sites and museums or for local walks, in normal circumstances, would be:

- 1 adult for every 10 students in Lower School and Middle School
- 1 adult for every 20 students in Upper School

Residential trips in the UK or overseas (non-adventurous)

- 1 Adult plus another adult as a base line (2 adults for first 10 students)
- 1 adult for every 10 students in LS & MS
- 1 adult for every 15 students in US

Residential trips in the UK or overseas (adventurous)

- 1 Adult plus another adult as a base line (2 adults for first 10 students)
- At least 1 adult for every 10 students

- 9.2 Trip leaders should assess the risks and consider an appropriate safe supervision level for their group. There should be a minimum of one teacher in charge.
- 9.3 In addition to the Trip Leader, there should be enough staff to cope effectively with an emergency. When visits are to remote areas or involve hazardous activities, the risks may be greater and supervision levels should be set accordingly. The same consideration should be given to visits overseas or residential visits.
- 9.4 It is desirable but not a requirement that at least one female adult and one male adult should accompany a mixed-sex group on day trips within the UK. For residential trips (except in exceptional circumstances) there must be staff of the same sex as the pupils on the trip.
- 9.5 Staff supervising students either directly, indirectly, or remotely on residential, overseas trips or for risky activities should ensure that they are capable to respond to any reasonable eventuality. This means that staff registered as being 'on duty' must refrain from the consumption of alcohol. Staff not on duty or staff taking students on non-residential, non-risky activities (such as attendance to a local musical concert) who are not required to drive or respond to emergencies should ensure that their behaviour and conduct falls in line with the Oakham School staff code of conduct. Alcohol consumption should not exceed more than two drinks of an evening.



- 9.6 Trips should be staffed by suitably checked and qualified employees and volunteers of the school. Staff members' spouses or parent volunteers who are not employees of the school should not be counted in the staff: pupil ratio on trips. The Trip Leader must also take into account the potential for staff members with spouses on the trip to compromise the group management plan (i.e. that staff member may, in a crisis, be more concerned with the safety of their spouse than the safety of the students). *This is not a reflection on the staff member, more a reflection of our understanding of human nature.*
- 9.7 When a staff member's child is on the same trip, the same judgement as above applies. The Trip Leader must judge the risk of the staff member compromising the group management plan (i.e. that staff member, may, in a crisis, be more concerned about the safety of their child, than the safety of the other students on the trip). *This is not a reflection on the staff member, more a reflection of our understanding of human nature.*
- 9.8 Parents are not able to accompany trips as paying participants as this compromises safeguarding and pupil management and contradicts the emphasis placed on trip benefits.
- 9.9 **Any approval to lead off-site visits must also include a judgement about how an individual will react in a crisis, without the immediate support of the establishment around them. Will they remain calm and take control of the situation, or will they let the situation control them?**
- The Trip Leader should assess each staff member's competence through:
- Observations of their group management and supervision skills within their day-to-day work in the establishment.
 - Evidence of relevant experience – e.g. assisting on visits or leading visits in a previous establishment.
 - Their personal interests and experience relevant to the proposed activities and environments.
 - Evidence of having undertaken appropriate training.
 - Evidence of relevant qualifications, including any specific qualification required by the law, the employer or the establishment (e.g. in First Aid).
 - Volunteers for DofE trips must receive induction training prior to a specific expedition. They must all have a DBS check arranged through HR by the trip leader. This needs to be in date and may need to be renewed after three months. Trip Leaders must register any volunteers with HR at least four weeks before the trip. This should be free as they are volunteers.
- 9.10 During some activities such as the Duke of Edinburgh (DofE) award there may be a requirement for Direct, Indirect and Remote Supervision. Young people must be supervised throughout all visits, even though they may be unaccompanied at times. Please see DofE section above.
- 9.11 Direct supervision is where a member of staff is with a young person / group. Indirect supervision is where young people are unaccompanied by a member of staff, but where there is a member of staff in the vicinity, for example as might occur in a museum or shopping centre, or 'down-time' at an activity centre.



- 9.12 Remote supervision is where young people are unaccompanied by a member of staff, and the supervising member of staff is not necessarily in the immediate vicinity, for example as might occur during DofE expeditions, or a 6th Form unaccompanied visit to university open day.
- 9.13 Indirect and Remotely supervised activities can bring valuable educational benefits, and the progression from dependence to independence is to be encouraged. Such activities develop essential lifelong skills, including managing risk, self-sufficiency, interaction with the public and social skills, decision making, etc.
- 9.14 The decision to allow indirect or remote supervision should be based on professional judgement considering such factors as:
- Prior knowledge of the individuals (including their maturity and levels of responsibility).
 - The venue and conditions.
 - The activity taking place.
 - Preparatory training of pupils.
 - The competence of the supervising staff.
 - The emergency systems in place.
- 9.15 When recording a remotely supervised visit, there must still be a named trip leader. This will be the member of staff that has made a professional judgement regarding the level of responsibility and maturity of the participants, and decided that in their opinion it is reasonable for them to be undertaking the specific activity unaccompanied by an adult.

10. Emergency Planning and Critical Incident Support

- 10.1 A critical incident is an incident where any member of a group undertaking an off-site activity has:
- Suffered a life-threatening injury or fatality.
 - Is at serious risk.
 - Has gone missing for a significant and unacceptable period.
 - Has behaved in a way that could seriously damage the reputation of the School.
- 10.2 As an employer, Oakham School is committed to providing emergency planning procedures to support groups and leaders in the event of a critical incident. All Oakham School trip leaders are provided with guidance for what to do in the case of a critical incident.
- 10.3 All trips have a nominated contact based at School – the EVC whose number is on all RAs: **07968 760023** and the Senior Deputy Head's number **07398 471709**. The EVC or another member of SLT has trip details and is 'on call' at all times during the trip. All information relating to the visit/trip is readily accessible on Evolve.
- 10.4 Oakham School has a Critical Incident Plan, which will be implemented in the event of an incident.



- 10.5 Each Risk Assessment contains a checklist of action to take in the event of an emergency on a trip.
- 10.6 Prior to and throughout the trip, Trip leaders must make themselves aware of any additional security risks at their destination, home or abroad. They should seek advice from the Home Office or Foreign Office websites with regard to travel concerns. They should then discuss this with the EVC, who will make the final decision as to whether the trip should go ahead.

<https://www.gov.uk/government/organisations/home-office>

<https://www.gov.uk/government/organisations/foreign-commonwealth-office>

11. Medical and First Aid requirements

- 11.1 Medical details for students and staff taking part in trips is provided automatically once the Trip Leader has populated the attendees on Evolve.

In order to view this information,

1. Click the green attendees icon on the top left hand corner of visit the form:

EVOLVE



2022 02 10 -

Visit Type & Date

ID:	1013
Department:	Trips
Overseas:	
Residential:	☒
Adventurous:	

2. Check the Medical Notes box:

Participants

Show on Register: ☐ Student ID ☐ Telephone ☐ Email ☐ Student Mobile ☐ Student Email ☐ B/House ☐ DoB ☒ Medicalnotes ☐ Ethnicity

	Consent	Forename	Surname	Sex	Group	Year	Medicalnotes
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3. Follow the instructions from there. Medical information will be issued and if there are any confidential matters that need to be shared with the Trip Leader, the Trip Leader will be asked to see the Medical Centre staff in person.



- 11.2 Some Trip Leaders may also wish to gather further information from parents through a specific medical consent form for residential trips. Any specific student medical issues are to be included in the trip risk assessment planning.
- 11.3 It is important that all trips have suitable numbers of staff with up-to-date first aid qualifications when supervising students on a school trip, including EpiPen training. For instances where a member of staff with First Aid training is not available, a risk assessment must be carried out and discussed with the Deputy Head Co-Curriculum, who will approve on a case-by-case basis.
- 11.4 Trip leaders planning trips overseas must liaise with the Medical Centre as soon as the trip is confirmed to enable them to order and arrange for appropriate vaccinations.
- 11.5 The Medical Centre will discuss any sensitive pupil information with the Trip leader and how this should be managed for the duration of the trip. It is the responsibility of the Trip Leader to share relevant medical information with all staff on the trip. They will also advise on the suitability of the trip for some students and whether it is appropriate for them to attend based on medical information.
- 11.6 First Aid kits must be carried on all trips, both within the UK and overseas. The Medical Centre must be given 2 weeks' notice to prepare First Aid kits appropriate for the trip. Kits must be collected in advance of the trip. First Aid kits vary in terms of size and contents. An example of the sizes of kit available from the Medical Centre are as follows:



Small – for theatre visits, museums



Medium – for non-adventurous overseas trips



Large – for adventurous trips, to keep at base camp or similar.

- 11.7 It is essential that all medication accompany the First Aid kits. (paracetamol and piriton) and pl, on the trip.
- 11.8 Where pupils own medication is taken, trip staff must ensure that they have the appropriate consent from parents to administer it. This applies to all Day pupils bringing in medication from home, particularly on overnight trips.



11.9 First aid qualifications must be current and should at the very least be held by the Trip Leader and any subgroup leaders. The required minimum level of First Aid qualifications are as follows:

- Emergency First Aid at Work (EFAAW) for Local or day trips to museums etc.
- Activity First Aid (AFA), Outdoor First Aid (OFA) or First Aid at Work (FAAW) for any residential trips.
- If any pupil on a trip is required to carry an Epi Pen then at least 1 member of staff must be trained and in date with the iHASCO training package Anaphylaxis and Allergy training for schools and carers and must have received practical training from the Medical Centre of another recognised training provider.
- All courses must involve a practical element and solely online courses are not acceptable.

12. Transport

12.1 Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it. All national and local regulatory requirements **must** be followed.

12.2 It is a requirement of Oakham School Policy that all staff must hold a category D1 entitlement for driving 17 seat minibuses and category B entitlement for 14 seat minibuses on their driving licence. They must also have completed and hold an up-to-date Oakham School MIDAS training qualification.

Casual drivers are available to book if no staff drivers are available. Drivers are found under 'Transport' in the Red Book.

12.3 The level of supervision necessary should be considered as part of the risk assessment process when planning the journey, giving proper consideration to issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus.

12.4 Driver checks of vehicles must be completed prior to the trip leaving Oakham, a check sheet is in the vehicle folder, to assist you.

12.5 The Visit Leader should ensure that coaches and buses are hired from an Oakham School approved company where possible. Oakham School has accounts with specific coach companies, for use both in the UK and overseas.

12.6 Transporting young people in private cars requires careful consideration. Staff cars should only be used to transport students in 'unplanned' or 'emergency' situations. For example, journeys to hospital, in all cases openness and transparency must be maintained.



12.7 Driving times and breaks

- Maximum total driving time must not be more than **10 hours** in one day and total time on duty in a day must not exceed **16 hours**.
- After **5.5 hours** of driving, a break of at least **30 minutes** must be taken in which the driver is able to obtain rest and refreshment.
- Teaching staff preparing to drive for more than 2 hours may request a period of up to an hour off immediately prior to driving. HODs should be contacted to provide cover, if necessary.

13. Bursary

- 13.1 The Bursary must be informed of significant trips as soon as the trip has been approved by the Deputy Head Co-Curriculum. They can then allocate a trip cost code and advise on budgeting and when to bill parents/pay deposits etc. The Trip Leader must meet with the Bursary before a letter can be sent out to parents.
- 13.2 A list of students planning on attending a trip that has a cost attached should be passed to the Bursary as soon as it is available because students receiving financial assistance towards their fees may be entitled to a reduction in the trip cost or the Bursary may be able to advise on the suitability of a pupil attending a trip due to its cost and their financial situation.
- 13.3 The Bursary must be given adequate notice of an expected invoices due for Trips. Invoices will not be paid until stage payments from students have been received to avoid exposing the Bursary to costs that cannot be recovered. The Trip Leader must liaise regularly with the Bursary to keep them informed of any cost fluctuations (exchange rates) or trip changes.
- 13.4 Cash to pay for aspects of the trip while the trip is in progress is not a recommended course of action by the Bursary and should be avoided where possible. Invoices will be paid in advance to tour operators to reduce the financial and personal risk to the Trip Leader of travelling with sums of money. Spending money or small amounts for taxis/food etc. must be planned with the Bursary to allow for currency to be ordered and collected in advance of the departure date.
- 13.5 Staff should also refer to the Financial Procedure Summary for Staff Document from the Bursary.
- 13.6 Final payments for all trips should be received by the bursary 12 weeks prior to departure for level 3 trips



14. **Parental Consent**

- 14.1 Parental Consent is required when an activity takes place outside of normal curriculum time, is adventurous, or when a financial contribution above £20 is required from the parents. For activities which take place during normal curriculum time and when no financial contribution from the parents is required, parental consent is not deemed necessary. Standard non-cost activities during curriculum hours are already covered in the trip consent signed by parents when students enter the School.
- 14.2 Almost all trips require communication with parents and all letters must be approved by Marketing and the Deputy Head Co-Curriculum before being sent to parents.
- 14.3 All residential trips and adventurous activities require specific parental consent.

15. **Review of Policy and Procedure**

Trip review meetings take place regularly to ensure ongoing review of practice and procedure. Following any review, this policy may be updated as necessary. The full policy is reviewed by the Deputy Head Co-Curriculum on a biennial basis to ensure the health, safety and welfare of all staff and students on educational visits arranged by Oakham School. Following a full review, the policy is then ratified by the School Trustees.



Appendix 1 – Adventurous Activities

Below is a list of 'Adventure Activities' as agreed by outdoor education advisers.

Before our students take part in any of the below the School must be sure that the relevant National Governing Body qualifications are held by the person/organisation running the activity or a technical advisor has provided a statement of competence.

- All activities in 'open country' such as D of E Expeditions.
- Swimming (all forms, excluding publicly life guarded pools)
- Camping where participants/leaders' erect tents and/or self-cater.
- Canoeing / kayaking
- Sailing / windsurfing / kite surfing
- Rafting or improvised rafting
- Use of powered safety/rescue craft
- All other forms of boating (excluding commercial transport)
- Water skiing
- Paintball (including 'Laser Quest')
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Mountain biking
- Rock climbing (including indoor climbing walls)
- Abseiling
- River/gorge walking or scrambling
- Coasteering/coastal scrambling/sea level traversing
- Underground exploration (Except designated 'Show' caves)
- Shooting 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
- '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.



Appendix 2 - Trip Leader to brief students and staff of the following:

1. The Importance of following instructions, traffic safety, disciplined behaviour and individual responsibility for collective safety.
2. Emergency procedures for the trip: what to do in the event of a critical incident including a terror attack. The following must be included:
 - It is unlikely that you will be caught up in a terror attack.
 - Remain alert to more 'usual' crime (bag theft, pick pockets) as this remains far more likely than terrorism.
 - Remind pupils to remain vigilant and alert, reporting anything suspicious to Trip Leaders.
 - Remind pupils of their actions and behaviour – in areas where there is a heightened security risk, inappropriate choice of language or actions will be taken very seriously (ie, joking about bombs, weapons etc).
 - Make pupils aware that there may be an increased presence of Police or security forces in the areas they visit (particularly tourist attractions/public buildings) and be mindful that they may be armed and appear more intimidating than they are used to. Officers may be forceful, direct, especially in an emergency situation.
 - Carry water and snacks on visits in case of travel disruption and long delays – especially due to increased security checks at tourist attractions/public buildings and spaces.
3. If appropriate - all participants to have signed the consent form and specific code of behaviour, as have their parents.
4. All staff should follow the professional code of conduct as detailed in the Staff Handbook and should be fully aware of the Critical Incident protocol in case of an emergency (see below).

Notes for Trip Leader:

- This risk assessment is a template, please make it specific to your trip and contact the EVC or H&S officer if further assistance is required. Refer to the Oakham School Educational Trips and Visits Policy.
- You must ensure that strategies for specific risk management are in place for the proposed activity – consider the Staffing, Transport, Activity, Group, Environment and Distance from school (STAGED) – see the Oakham School Educational Trips and Visits Policy for detail.
- Ensure that there is a plan B if poor weather, group behaviour, change in circumstances etc. make it difficult for the planned activity to take place safely
- Attach an itinerary for your trip to this risk assessment, if multiple locations form part of the trip.
- By sending this risk assessment to the Deputy Head Co-Curriculum/EVC, you are confirming that you have read and understood the risk assessment and suitably briefed all members of staff attending the trip.



Action in the event of an emergency (critical incident) on a school trip:

1. Establish nature and extent of the emergency.
2. Make sure that all other members of the party are accounted for and safe.
3. Staff member to contact Senior Deputy Head to alert to the situation. Pass full details of the incident (name, nature, date and time of incident, location of incident, details of injuries, names and telephone numbers of those involved, action taken so far). Provide telephone numbers for future communication and identify an alternative telephone number in case telephone lines became jammed.
4. Senior Deputy Head will instigate Critical Incident Plan.
5. If there are injuries, establish their extent and administer first aid (if you have been trained or feel capable)
6. Establish the names of the injured and call relevant emergency services.
7. Advise other party staff of the incident and that emergency procedures are in operation.
8. Ensure that an adult from the party accompanies casualties to hospital.
9. Ensure that the remainder of the party is adequately supervised throughout and arrange for their early return to base.
10. Arrange for one adult to remain at the incident site to liaise with emergency services until the incident is over and all children are accounted for.
11. Media: The school press officer will make contact with the Trip leader to advise. Under no circumstances should the name of any casualty be divulged to the media.
12. The Party Leader should write down as soon as practicable all relevant details. A record should be made of any witnesses. Any associated equipment should be kept in its original condition.
13. Legal liability should not be discussed or admitted
14. All accident forms should be completed. The School will contact insurers and the HSE if applicable.
15. In the event of a terror attack, students will have been briefed in advance of the trip. They should follow the instructions of the trip leader and should remain with the staff member in charge of their group unless instructed otherwise.



Appendix 3 – Standard checklist for organising a trip

This checklist is intended as a guide to ensure key aspects are met of organising a trip/educational visit, particularly those beyond the School timetable. However, it is not exhaustive. Please use the checklist in conjunction with the Educational Trips and Visits Policy and contact the EVC or Deputy EVC for further information/queries.

- ☐ Complete and submit Trip Approval form (signed by Bursary if applicable) to EVC
- ☐ Trip approved (if not approved, meet with EVC to discuss)
- ☐ Submit details of trip to Red Book calendar
- ☐ Submit details of trip to Evolve
- ☐ Prepare letter and send to Marketing for proof reading, refer to Oakham brand guide
- ☐ Plan Assembly to promote trip
- ☐ Medical Centre – initial conversation to establish vaccinations, trip requirements, dates

List of Pupils interested in trip established

- ☐ Submit pupil list Evolve then check suitability with Medical Centre and Bursary
- ☐ Arrange meeting with Finance Bursar to discuss trip budget in detail
- ☐ Take advice – where issues are raised regarding a pupil, discuss with the EVC before the pupil
- ☐ Check Tier 4/Visa requirements of pupils with Admissions
- ☐ Check pupil/staff ratio
- ☐ Check staff suitability and first aid qualifications

Confirmed list of Pupils

- ☐ Book travel, accommodation and create an itinerary
- ☐ Get parental consent for each pupil using the consent forms in Evolve
- ☐ Secure transport to/from School or alternative arrangements
- ☐ Communicate with parents (letter to be checked with Marketing) regarding vaccinations/visas etc

Countdown to trip departure – Two months to go

- ☐ Request medical information via Evolve
- ☐ Book School mobile phone from Reception
- ☐ Complete draft risk assessment
- ☐ Book trip meeting with EVC and Deputy EVC via Deputy Head Co Curriculum PA
- ☐ Finalise risk assessment and send to EVC/Deputy EVC
- ☐ Final meeting with Bursary for final payments/invoices/currency
- ☐ Complete trip pack for Trip Leaders and EVC (risk assessment, itinerary, medical information etc)



Countdown to trip departure – Two weeks to go

- ☐ Final communications to parents and pupils
- ☐ Collect First Aid Kits
- ☐ Check flights
- ☐ Check Home Office for changes in advice/security alerts
- ☐ Meet with marketing regarding social media updates during trip

Returning from trip

- ☐ Return First Aid Kits to Medical Centre
- ☐ Complete accident form on OSIS for any injuries if applicable
- ☐ Arrange post trip meeting with EVC/Deputy EVC