

**ST MARGARET'S**  
SCHOOL

**Educational Visits Policy**  
**For Early Years**  
**Foundation Stage Pupils**

(pupils in Lower & Upper Nursery, Pre Reception and Reception)

# **EDUCATIONAL VISITS POLICY FOR EARLY YEARS FOUNDATION STAGE PUPILS**

## **Contents**

<b>Introduction</b>	<b>6</b>
<b>St Margaret's School Policies and the National Guidance</b>	<b>6</b>
2.1. St Margaret's School Policies	6
2.1.a St Margaret's School's Child Protection Policy	6
2.1.b St Margaret's School's First Aid Policy	7
2.1.c St Margaret's School's Accessibility Plan	8
2.1.d St Margaret's School's Visitors' Protocol	9
2.2. The National Guidance	9
<b>Clarification of Roles</b>	<b>9</b>
3.1. The Role of the Governors	10
3.2. The Role of the Head of Junior School	10
3.3. The Role of the EVC	11
3.4. The Role of the Group Leader	12
<b>Procedural requirements</b>	<b>13</b>
4.1. Risk assessment	13
4.2. Approval of staff to lead activities and visits	13
4.3. Evaluation of external providers	13
4.4. Parental communication and consent	13
4.5. Prior notification and approval of visit forms	15
4.6. 'Checking out' and 'checking in' before, during and after a visit	16
4.7. Evaluation	16
<b>Monitoring</b>	<b>16</b>
<b>Induction, training, apprenticeship, succession planning</b>	<b>17</b>
<b>Risk-management and risk-benefit assessment</b>	<b>17</b>
7.1. Staffing, Ratios, and Supervision	18
7.2. Remote Supervision	19
7.3. Transport	19
7.4. First Aid	19
<b>Assessing venues and providers</b>	<b>20</b>

<b>Emergency procedures and incident reporting</b>	<b>21</b>
<b>Behaviour and Safety during the Visit</b>	<b>22</b>
<b>Inclusion</b>	<b>22</b>
<b>Insurance</b>	<b>22</b>
<b>Finance</b>	<b>23</b>
<b>14 Data protection</b>	<b>24</b>
<b>Appendices</b>	<b>24</b>
Appendix 1 -	25
Group Leaders' Checklist for Off-Site Trips/Visits	25
Appendix 2 – WHAT TO INCLUDE IN A TRIP PACK FOR RESIDENTIAL AND NON-RESIDENTIAL VISITS/TRIPS	27
Appendix 3 - FORM 2	28
EDUCATIONAL VISITS – EYFS – DETAILS FOR FINANCE OFFICE	28
Appendix 4 – FORM 3	30
RISK ASSESSMENT	30
Appendix 5 - FORM 5	31
TRIPS SUMMARY INFORMATION	31
Appendix 6 - FORM 6 – EMERGENCY PROCEDURES ON SCHOOL VISITS	33
Appendix 7 - FORM 7	35
EDUCATIONAL VISITS – EYFS - EVALUATION FORM	35
Appendix 8 – FORM 8	37
REPORT OF ACCIDENT OR DANGEROUS OCCURRENCE ON SCHOOL VISITS	37
Appendix 10 - COACH QUOTE REQUEST	39

## Introduction

This policy is applicable to the School's Early Year Foundation Stage ("EYFS") pupils. For non-EYFS educational visits please see the School's Educational Visits policy.

Educational visits are an important part of a child's education, providing access to a variety of new learning experiences, broadening horizons and allowing pupils to develop independence and maturing social skills. At St Margaret's we offer a range of successful visits enabling every pupil who wishes to take part the opportunity to do so.

EYFS includes children in four academic years, Lower Nursery, Upper Nursery, Pre Reception and Reception.

Any activity where children are not on the school site is classed as an Educational Visit and is subject to the [National Guidance](#) published by the Outdoor Education Advisers' Panel (OEAP). This includes all day trips, residential visits, sports fixtures and local visits off site. Although EYFS children are not taking part in Residential trips.

The School's Educational Visits Policy is therefore based on the framework ([5.3b Writing an Establishment Visit Policy](#)) published by the OEAP and it must be read by any group leader and supporting staff undertaking a trip.

All visits for children in EYFS which at St Margaret's are subject to approval by the Head of Junior School who is also Head of EYFS and the Educational Visits Coordinator (EVC) and require submission of all the relevant documentation on Evolve.

Additionally, educational events on the school site require an identical approval procedure when external providers and speakers are being used. In such instances Evolve forms with attached Risk Assessments are also required to be completed.

**This policy should be read with Missing Child Policy & Procedures, which outlines what to do if a child goes missing in school and on a trip.**

## St Margaret's School Policies and the National Guidance

### 2.1. St Margaret's School Policies

#### 2.1.a St Margaret's School's Child Protection Policy

All children have the right to be protected from harm. An educational activity organised on site, off-site and residential activities, provide a stimulating learning, environmental and, in many cases a different and more relaxed or interactive setting.

The School is committed to:

- Ensure safeguarding Children procedures
- Ensuring clear lines of communication and effective liaisons are established between staff managing and supervising this work

- Ensuring clear lines of communication and effective liaison are established between all agencies responsible for the safety and welfare of children
- Enabling children to understand their rights and recognise and deal with unsafe situations

Clear DBS checks are required for all supervising staff.

In the case of Homestay trips in the UK, host parents must obtain and provide the School with a clear DBS barring list check. Please consult the Educational Visits Coordinator for more information.

#### 2.1.b St Margaret's School's First Aid Policy

The School's First Aid Policy ensures that, as far as reasonably practicable, the School is an accident-free environment. The provision of a first-aider does not prevent accidents, but it is an important part of the control measures that follow risk assessment.

All staff complete Emergency First Aid training regularly. The obtained qualification lasts three years. Additionally, we have dedicated paediatric first aiders in line with EYFS guidance. (for the full list of first aiders see [St Margaret's School's First Aid Policy](#) p.15).

The School provides adequate and appropriate equipment, facilities and personnel at its locations to enable employees, pupils and visitors to be given first aid.

Prior to departure from School, Group Leaders are required to obtain a medical First Aid kit from the School Nurse. The School Nurse will make a judgement on what equipment requires to be included. The Nurse's decision will be influenced by:

- The hazards in any environment and the risks they present
- Any generic policies in place
- The group and its needs (including medical)
- The leaders and activities to be undertaken
- The transport arrangements
- The remoteness of any location and the ability to summon support
- What first aid qualifications and experience are available at the trips providers locations/centres
- The history of any incidents or accidents in similar contexts

Parents will be notified in advance of:

- a pupil attending a day out on a trip / visit, including details of any extra charge and details of visit duration
- planned trips and visits for EYFS year groups.

Whilst particularised in greater detail at section 4.4 below individual written consent will be obtained where EYFS pupils are taken on a trip or visits off site which last more than one hour and / or transportation.

The completed and signed consent form will include details of how to contact a parent in the event of an emergency. The form must be returned to the school at least three days before the start of the trip

Where outings involve walking for no more than an hour to local landmarks etc., parents will be notified via a letter and parents will be asked for permission once a term for such visits.

It is the Group Leader's responsibility to obtain a list of specific medical needs (including allergies) prior to every trip. The Group Leader will take a first aid kit with the, a list of emergency contact numbers and a mobile phone. Bottled water will also be taken on longer visits.

The Group Leader needs to arrange for a meeting with the School Nurse. During this meeting the School Nurse will brief the leader on the individual medical needs of the students involved. **It is the Group Leader's responsibility to pass this information on to the relevant accompanying staff and, if deemed necessary, to make pupils aware of any severe conditions suffered by a member of the group (such as food allergies that could lead to severe anaphylaxis reactions).**

In the case of pupils participating on a trip who carry an epi-pen, an additional epi-pen must be carried by a member of staff on that trip.

During the outing the Group Leader must take reasonably practicable steps (if proportionate, suitable and sensible depending on the particular circumstances) to ensure safety.

#### 2.1.c St Margaret's School's Accessibility Plan

It is the School's intention that all pupils should have the opportunity to participate in trips organised by the School. However, due to the nature of certain trips given year groups will not be permitted to participate. Also having reached a certain recruitment quota, allowing further students to join an existing group should be left to the discretion of the Group Leader.

Since the School strives to be a fully inclusive and welcoming school and therefore aims to ensure that each and every pupil can participate fully in the life of the School, all effort must be made to ensure that every student has the opportunity to participate despite their disabilities or learning difficulties. Teachers should plan for inclusion from the outset and should make appropriate 'reasonable adjustments' to enable the participation of disabled pupils. However, the adjustments made should seek to ensure that the planned purpose of the activity is not diluted.

For further guidance on inclusion see **Section 10. Behaviour and Safety during the Visit** of this Policy.

## 2.1.d St Margaret's School's Visitors' Protocol

When organising events on the School site, the Group Leader/organising teacher needs to ensure that the School's Visitors' Protocol is followed. Visitors will not be left unsupervised with children at any point.

## 2.2. The National Guidance

Any visit that leaves the school grounds or educational activity that involves outside agencies is covered by this policy, whether as part of the curriculum, during school time, or outside the normal school day.

In addition to this Educational Visits Policy, St Margaret's School:

1. Adopts National Guidance <https://oeapng.info/>
2. Uses EVOLVE, the web-based planning, notification, approval, monitoring and communication system for off- and on-site activities.

Staff pupil ratios recommended by the DfE for offsite activities are the same as EYFS regulations or higher depending on the visits. Ratios will be set by the Head of the Junior School and will never fall below national EYFS requirements.

Type of Visit	Staffing ratio	First aid requirements
External off site visit		
Low risk off site	Age 2 1:2; age 3 1:3; Age 4 1:4	Paediatric first aider should be accompanying the visit.
On site - normal ratios apply	Aged 2: 1:4, Aged 3 1:8 Age 4 1:13	Paediatric first aider should be accompanying the visit.

All staff are required to plan and execute visits in line with this school policy and National Guidelines. Staff are particularly directed to be familiar with the roles and responsibilities outlined within the guidance (also discussed below).

In the event of any apparent conflict between St Margaret's School policies and the National Guidance, School policies must be followed and clarification needs to be sought from the Educational Visits Coordinator (EVC) or the Senior Leadership Team.

## Clarification of Roles

The National Guidance outlines the typical responsibilities of various roles including:

- 3.1. The Governors
- 3.2. The Head of Junior School
- 3.3. The Educational Visits Coordinator (EVC)
- 3.4. The Group Leader

The following section of St Margaret's School's Educational Visit Policy is once again based on the recommendations highlighted by the OEAP.

### 3.1. The Role of the Governors

- To ensure that the School's Educational Visits Policy (EV Policy) is being followed.
- To ensure that the Governing Body has its own systems in place to support educational visits and provide approval for new residential and overseas visits and any new visits which include hazardous activities. The Governors of St Margaret's School delegate the responsibility for authorising repeat visits to the Headmistress.
- To review the EV Policy and procedures including incident and emergency systems.
- To discuss the place of off-site visits and outdoor learning in relation to the ethos and aims of St Margaret's School.
- To ensure there is an EVC in place who meets employer requirements.
- To be involved in adjudicating parental complaints or dealing with emergencies.

### 3.2. The Role of the Head of Junior School

- To approve any suggested trip for EYFS.
- To ensure that the School's EV Policy is being followed.
- To ensure that the EVC is competent to oversee the coordination of all off-site education and support the EVC in attending relevant training courses.
- To ensure that the EVC keeps the Headmistress informed of the progress of visits and that this information is conveyed to Governors and parents as necessary.
- To ensure, through the EVC, that for each group there is an appropriate leader who is experienced in educational visits and has the skills and training to complete the task successfully as well as being able to respond to unexpected circumstances.
- To ensure that in the event of a major incident or accident School Policies are adhered to in terms of informing parents, staff and the media. Help to ensure that serious incidents, accidents and near-accidents are investigated.

- To ensure emergency procedures are in place.

### **3.3. The Role of the EVC**

It is identified by the OEAP as good practice for schools to have EVC. The EVC's role at St Margaret's is to support the Head in ensuring that all visits follow the EV Policy of the School and all other School policies and procedures and to act on behalf of the Head.

- To approve educational visits for EYFS as agreed by the Head of Junior School
- To provide adequate documentation to support planning of all trips and visits.
- To ensure that all off-site visits are thoroughly planned using standardised whole-school documentation on Evolve.
- To ensure that Group Leaders are aware of the guidelines established in this policy.
- To assign competent people to lead or otherwise supervise a visit.
- To advise the Group Leader and ensure visits have appropriate support ratios and adequate cover for health and safety, first aid and behaviour management.
- To work with the Group Leader to obtain the consent of parents on a fully informed basis.
- To ensure there is an emergency contact for each residential visit and that emergency procedures are in place.
- To keep records of individual visits.
- To ensure that arrangements are in place for the Governing Body to be made aware of visits.
- To be involved in educational visit management to ensure that the guidance and regulations are followed.
- To work with Group Leaders to ensure that the aims of the visit are achievable and in line with those of the school.
- To ensure that the online approval form (EVOLVE) has been completed in full and submitted to the Head and six weeks in the case of non-residential visits.
- To ensure that visit evaluation is used to inform future visits and training needs.
- To arrange for the recording of accidents and the reporting of injuries as required.
- To review systems and, on occasion, monitor practice.
- To advise the Head of any concerns regarding a proposed visit.
- To monitor, reinforce, and remind staff of their duties regarding GDPR and educational visit data.

### **3.4. The Role of the Group Leader**

The Group Leader has full responsibility for the safe running of the activity including pre planning, following guidance and School policies ensuring that all participants are aware of their roles. To achieve this, the Group Leader will:

- Identify the clear purpose and objectives of the visit.
- Complete all visit documentation, upload them onto Evolve, obtain HoD, EVC and Head approval for any event organised off- or on-site, no matter how short the duration.
- Plan the itinerary to account for all times on the visit including transport, meal times and relaxation times, particularly on residential trips.
- Have prior knowledge of the venue – if practicable, the Group Leader should have made an exploratory pre-visit. The Group Leader is to include this information on their Evolve form.
- Inform parents and seek consent, detailing the nature and purpose of all activities related to the visit/event. The letter requires approval by the Office Manager, following which the letter is to be uploaded onto Evolve. Reply-slips are to be kept safe by the Group Leader.
- Allocate supervisory responsibility to each member of staff for named pupils and ensure that each member of staff knows for which pupils they are responsible. Ensure that each child knows which adult is responsible for them.
- Ensure that all members of staff involved are aware of the risk assessments, emergency contact details, medical information obtained from Schoolbase (please refer to section 2.1.c for further guidance) and emergency procedures. Each accompanying staff, SMT contact and EVC require a full pack of documentation which is also submitted to the Main School Office of St Margaret's School prior to visits/trips.
- Report any accident or injury to a pupil or member of staff and follow the School's Emergency Procedure Protocol.
- Continuously monitor the appropriateness of the activity, the physical and mental condition and abilities of the group members and the suitability of the prevailing conditions.
- Evaluate the trip/event on Evolve against the aims identified by the Leader during the form submission process.
- Contribute to the development of good practice by uploading all additional/relevant documents onto Evolve.
- Ensure that GDPR guidelines are followed during the planning, execution and evaluation of the educational visit. Group Leader to ensure all accompanying staff

dispose safely of the personal information of staff and students by placing all documentation in the Staff Room's shredding bin.

Further guidance on roles can be found in the following document [NG Section 3.1b Establishment Roles and their Inter-Dependence](#).

## Procedural requirements

### 4.1. Risk assessment

Each visit will have its own risk assessment, which will be reviewed before a repeat visit is made.

The National Guidance provides advice about risk management and risk-benefit assessment. St Margaret's School follows these guidelines. For further detail please see section **Section 7. Risk-management and risk-benefit assessment** of this policy and [NG 4.3c Risk Management – an Overview](#).

### 4.2. Approval of staff to lead activities and visits

The staff selected to lead educational activities and visits at St Margaret's are required to be accountable, confident and competent to lead the specific visits or activities for which they are approved. Approval should never be assumed and should involve professional judgement as well as evidence of technical competence. The Head and/or EVC at St Margaret's should make an informed judgement about the suitability of that person to lead that group on that visit/activity in that environment. 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 School around them.

### 4.3. Evaluation of external providers

This policy aims to clarify expectations about the selection of venues, facilities and external providers. To reduce bureaucracy for both Group Leaders and providers, St Margaret's School takes advantage of established national approval schemes. More on this can be found under **Section 8. Assessing venues and providers** of this policy. EYFS children may visit a local church, library or a place such as a fire station. Typically visitors visit the school to enhance the curriculum, such as a visiting farm.

### 4.4. Parental communication and consent

St Margaret's School is committed to establishing clear communication with parents right from the onset of visit and trips. Parents must receive written information about all events/trips organised by the School. Group Leaders need to compile a letter to parents that should include the following sections:

- Purpose of the trip
- Expected maximum cost (including cost of any special equipment / clothing)

- Details of transport arrangements
- Times and locations for pick up and drop off (this may be included in a later letter when exact details are known)
- The letter should be clear that deposits are non-refundable unless the School cancels the trip
- A reply slip should be attached to the letter requesting consent for pupils to participate in the visit and a commitment to pay either immediately, or via the following terms bill.

It is also recommended that the reply slip on the first letter include a request for the name of the pupil as written on the passport. Names used in school are often different to those written on the pupils' passports. This also highlights early on whether visa arrangements may have to be made.

This letter needs to be proof-read and approved by the School's Office Manager. Once the trip letter has been signed off by the Office Manager, it can be uploaded with all other relevant documents to the initial approval form on Evolve.

The Department for Education has published guidance on understanding and dealing with issues relating to parental responsibility, including ["Who is a parent?"](#) The guidance states:

*'Where schools need parental consent to outings and activities, Head Teachers should seek the consent from the resident parent [i.e. the parent who lives with a child] unless the decision is likely to have a long-term and significant impact on the child, or the non-resident parent has requested to be asked for consent in all such cases.'*

Sometimes there can be difficulties in obtaining consent for children in care. For example, a foster carer - although acting as a resident parent may in some cases not have the authority to give consent for a visit and there may be a delay while they seek guidance from the legal guardian.

St Margaret's is **not** required to obtain consent from parents for pupils to participate in off-site activities that take place during school hours and which are a normal part of a child's education, such as local studies and visits to a museum or library etc. (Education Act 2002 section 29). However for EYFS children we do always inform parents and obtain consent.

There are three different types of consent that are obtained at St Margaret's School:

- a. A one-off or blanket consent form:** this consent form is signed at a child's enrolment with the School. This consent form provides evidence that parents have consented in advance to all visits and activities, which require their consent. Nevertheless, parents must be given information about the visit and their child's proposed participation, and given the opportunity to withdraw their consent should they not wish them to participate.
- b. Visit specific consent forms:** These might include:
  - Visits to countries which require proof of parental consent;
  - Visits for which an agreement is required for payment or other terms and conditions;

- When it is decided to use a provider's consent form
- c. **The formal 'Consent and Indemnity' FORM 9:** this form is obtained with residential trips. They should be sent to parents approximately a term in advance, they must be signed before the start of the journey. No pupil may participate in the trip without this form having been returned to the Group Leader. A copy of the 'Consent and Indemnity' form must be left with the Emergency Contact person and the originals taken on the trip.

Individual health requirements of pupils and staff must be considered. Trips within school hours can rely on contact being made with the School Nurse to check consents for minor medical treatment. Trips that extend outside school hours will require that the Group Leader carries individual-specific action forms (produced by the School Nurse) containing information of health issues, specific needs, disabilities, dietary requirements and consents. If the trip is overseas the Group Leader must take individually signed parental consent forms with medical, dietary, disability and specific needs information and consent for medical treatment, including emergency medical treatment if the parents cannot be contacted (Form 9).

Photographs in which individuals can be recognised are regarded as personal data in law. If certain departments of St Margaret's intend to use photographs of children, or to allow another organisation such as an activity provider to use such photographs, then the Group Leader must obtain specific parental consent to do so.

Parents can occasionally give consent electronically (e.g. by email, text) or in a letter for their daughter to be picked up at the end of an activity by family members or acquaintances.

Parents must acknowledge that their child is fit enough to go on the trip, outline any health problems and authorise the leader of the party to act on their behalf in an emergency (Consent and Indemnity Form 9). They must also provide a contact number for the duration of the trip.

If appropriate, packed meals should be booked from the Catering Department using the Pink Form. Any request for transport or other requirements should be noted on FORM 2.

#### **4.5. Prior notification and approval of visit forms**

When planning residential trips the Group Leader should ensure that initial approval would have been granted by adding their trip to a list circulated by the School's Calendar Administrator. This is to prevent clashes and possible cancellation of trips due to low uptake. The proposed trip list is then approved by the School's SMT.

To approve educational activities and visits the School has developed its own Evolve-based approval procedure. Staff are advised to complete the 'Initial Approval Form' on Evolve and upload all the required and relevant documentation. This approval form then is passed on to the Head of Department in the relevant section of the School. Once departmental approval has been granted, the form is forwarded to the School's Educational Visits Coordinator. Their task is to check the uploaded documentation and seek clarification if required. In the final stage of the approval procedure the Head views the details and decides to grant her permission.

All visits and activities are entered in the Calendar by the School's Calendar Administrator in advance of printing and therefore pre-planning at least a term in advance is essential.

#### **4.6. 'Checking out' and 'checking in' before, during and after a visit**

Prior to departure from School premises it is the Group Leader's responsibility to give trip information packs to the School Office, SMT contact (if appropriate) and staff participants. Office staff is then tasked with marking students with a 'V' (Educational Visit) on Schoolbase. The Group Leader is expected to remind pupils about the rendez-vous, dress code, standards of behaviour etc. The Group Leader also needs to ensure that they have collected first aid kit(s) from the School Nurse and have picked up the packed lunches from the School's caterers.

If the return of a visit is delayed, the Group Leader should contact parents using the Clarion Call school/parent contact service and also advise the School Office (open until 5.30pm) or SMT contact.

During the visit the Group Leader must ensure they follow the School's Emergency procedures (see **Section 10. Emergency procedures and incident reporting**) in case of emergencies and notify their Emergency SMT contacts about unexpected incidents.

Upon return to School Group Leaders are required to inform SMT in writing of any incidents and when appropriate record the incidents on the School's safeguarding software <https://www.myconcern.co.uk/>.

#### **4.7. Evaluation**

On their return Group Leaders will report on the trip and procedures to the EVC. This may be done verbally for day visits but a written report will be required for longer and new trips.

Group Leaders will be expected to complete an Evaluation Report Form 7 on longer and new visits. Group Leaders will review their procedures and risk assessment after the event and keep a written record of any problems which may have arisen, the solutions and outcomes and changes to be made if the visit takes place again. The completed Form 7 is to be shared with the Head of the School and it is the duty of the EVC to report any concerns about the safety of any trips.

Non-residential and established one-day trips need to be evaluated on Evolve. The software will remind Group Leaders to assess their trips against the aims that were set out in the Initial Approval Form.

## **Monitoring**

It is a requirement for an employer to monitor the implementation of their health and safety arrangements. Therefore, it is the responsibility of the Governors, Head, SMT and the EVC to ensure that outdoor learning and off/on-site events are carried out safely and effectively and in line with St Margaret's School's policies and procedures.

It is also an expectation that the above-mentioned parties are responsible for producing relevant policies and procedures and reviewing and updating existing policies to remain in line with good practice.

Monitoring should ideally include an element of field observation. The above-mentioned parties can choose to attend residential trips; focus on straightforward or routine activities, on-site or off-site; sample monitor across the full range of provision. The SMT of St Margaret's and the EVC frequently volunteer to attend trips and this is an ideal opportunity for monitoring the implementation of School policies and seeing good practice in action.

Monitoring of health and safety should be done in such a way that it is a positive experience for Group Leaders, with supportive feedback to enable them to reflect upon and improve their practice. At St Margaret's it is often integrated with appraisal and with observation of teaching and learning – in this case outside the classroom.

Further details are available at the [NG Section 3.2b document: Monitoring](#).

## **Induction, training, apprenticeship, succession planning**

**All members of staff** are expected to familiarise themselves with the School's Educational Visit Policy and relevant School policies and procedures. Staff will attend inset sessions where certain aspects of their knowledge on leading and organising educational activities will be refreshed. It is the School's responsibility to provide appropriate opportunities for staff to update their existing knowledge of the procedures followed in the School.

Additionally, any new member of staff upon joining St Margaret's must receive training on the procedures adopted by the School.

The EVC of St Margaret's needs to ensure their knowledge on recent recommendations is in line with DfE requirements and follows those suggestions outlined in the National Guidance. Therefore, the School needs to ensure relevant training is available for the EVC to obtain the required knowledge for advising staff with the latest recommendations.

St Margaret's is fortunate to have numerous experienced group leaders.. When a new ECV is required, an experienced member of staff needs to be selected. The School must ensure that newly appointed EVCs have an opportunity to attend training organised by outdoor educational bodies and also by EVOLVE.

## **Risk-management and risk-benefit assessment**

The risk management of an activity should be informed by the benefits to be gained from participating. St Margaret's 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 HSE endorse this approach through their ['Principles of Sensible Risk Management'](#) 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. DfE also makes it clear that staff need to complete a risk management plan for all educational activities.

Generic St Margaret's School risk management plans exist for a wide range of trips and components of trips – accommodation, transport, routine visits etc. These are available on the EVOLVE in the documentation section.

A useful framework for assessing risks – **SAGED**:

- **Staffing requirements** – trained? Experienced? Competent? Ratios?
- **Activity characteristics** – specialist? Insurance issues? Licensable?
- **Group characteristics** – EYFS: limited experience; Ability; And Behaviour Special and medical needs?
- **Environmental conditions** – like last time? Impact of weather? Water levels?
- **Distance from support mechanisms in place at the home base** – transport? Residential?

Professionally operated licensed activity centres and tour operators specialising in school visits will conduct their own risk assessments. The Group Leader should ask for copies at the planning stage. Provided that they are satisfied that the risk assessments meets the requirements of St Margaret's school for the activity part of the visit, it can be attached to the St Margaret's risk assessment (covering all other aspects of the visit). Risk assessments carried out by the School for previous visits can generally be updated and re-used, unless there has been a change of circumstances.

For further guidance see National Guidance's following documents:

- [4.3g Risk Management - What to Record](#)
- [4.3c Risk Management – an Overview](#)
- [4.3f Risk Management – some practical advice](#)

## **7.1. Staffing, Ratios, and Supervision**

On all visits there must be 'effective supervision' that has been approved by the EVC and the Head of Junior School. Particular consideration must be given to the additional implications that may arise if staff are to accompany trips which their own children are attending.

[The EYFS Statutory Framework](#) (2021) no longer sets out different requirements for minimum ratios during outings from those required on site, for safeguarding of both staff and students the School decided to follow the staffing ratios based on the recommendations of the National Guidance [4.3.b Ratios and effective supervision](#)

:

Type of Visit	Staffing ratio	First aid requirements
External off site visit		
Low risk off site	Age 2 1:2; age 3 1:3; Age 4 1:4	Paediatric first aider should be accompanying the visit.
On site - normal ratios apply	Aged 2: 1:4, Aged 3 1:8 Age 4 1:13	Paediatric first aider should be accompanying the visit.

A leader may have to leave the group for reasons such as illness, an emergency at home or accompanying a sick or injured participant. Group Leaders and the EVC must take this into account when determining the leader/child ratio.

## 7.2. Remote Supervision

Pupils must be supervised throughout all visits,

## 7.3. Transport

Most school trips will involve transportation by some type of bus, either a school minibus, hired minibus or hired coach. It is extremely important that staff and pupils use such transportation safely. Everyone must wear seat belts at all times. It is good practice for staff to remind all pupils of the need for good behaviour before all minibus and bus journeys.

The Group Leader should ensure that coaches or buses are only hired from approved providers. Group Leaders are to contact the Director of Finance and Operations's Personal Assistant in the initial stages of their planning, complete the Coach Request Form (Appendix 10) and request quotes from approved providers. Group Leaders then upload their chosen quote onto Evolve.

Parents must be made aware of the intended form of transport, and their consent obtained.

It is a requirement of St Margaret's School that all staff who wish to drive a school minibus are approved to do so. The full list of those who are eligible to drive minibuses can be found on EVOLVE in the Documents section.

## 7.4. First Aid

For all EYFS visits there will be a responsible adult with a good working knowledge of First Aid appropriate to the environment (e.g. urban, remote, water, etc.).

The Group Leader must have details of any medical conditions, and medical treatment consent forms (if appropriate to visit) with them at all times. A designated accompanying staff might be chosen to carry medical equipment like inhalers and epi-pens.

For further guidance see [St Margaret's School's First Aid Policy](#).

## **Assessing venues and providers**

Where possible Group Leaders should visit intended venues. In cases where this is not possible the Group Leader should research the intended venue using the internet, recommendations from other schools and any other means they have available to them.

Group Leaders should look for **LOtC Quality badge** and **AALA Licenses centres** as holding one of the above is a creditable assurance of appropriate Health and Safety Management Systems.

It is recommended that St Margaret's staff research their intended activity provider on EVOLVE to ensure that their chosen provider holds the above accreditation.

New providers, or providers with no track record of visits will require a pre inspection visit. It may be necessary to visit a centre to see if the provider can meet the needs of pupils if the trip consists of pupils who have additional needs.

## Emergency procedures and incident reporting

Serious incidents on off-site visits are rare but they do happen. Minor incidents, whether accidents or other emergencies, are more common. Effective planning means that the likelihood of any of these is reduced, and that, when they do happen, their impact and consequences are minimised.

St Margaret's therefore adopted the recommendations of the National Guidance on dealing with these incidents. **FORM 6 – EMERGENCY PROCEDURES ON SCHOOL VISITS (Appendix 6)** must be carried on all off-site visits and staff are expected to follow the steps outlined in it should an accident or major incident occur.

In the event of a serious accident resulting in the death or injury of one or more of the pupils and staff, the Group Leader must complete **FORM 8 - REPORT OF ACCIDENT OR DANGEROUS OCCURRENCE ON SCHOOL VISITS (Appendix 8)** within 24 hours also located on the School's Intranet in the Educational Visits folder.

Depending on the nature of the incident, the School may implement the Critical Incident Plan. The School will speak personally to the parents of any pupil who has suffered some injury or mishap and use mass communication methods (e.g. email, messages on the School's website) for communicating with those whose children are not affected. This is in line with the School's Critical Incident procedures held by the Senior Management Team.

Communication with the media should be left to the Head. The Group Leader should refer the media to the School. If comment is unavoidable, it should be brief, factual, calm, with no attempt made to cover gaps in knowledge. Pupils should be discouraged from talking to the media or posting information on any social media platform.

In the event of a serious accident resulting in the death or injury of one or more of the pupils and staff, the Group Leader in charge first priority is to summon the emergency services and to arrange for medical attention for the injured party. One of the accompanying members of staff should accompany the injured pupil(s) to hospital and remain until a parent arrives.

After ensuring that the rest of the group are safe and looked after, the Group Leader will:

- inform the Head of Junior School of what had happened.
- where the full facts have not yet emerged, they should say so and ensure that follow-up communications are maintained.
- arrange for the School's insurers to be contacted as quickly as possible.
- a full record should be kept of the incident, the injuries and of the actions taken.
- where appropriate the School communications plan will be implemented.
- where possible, communication with the media should be left to the Head. The Group Leader in charge will refer the media to the school. If comment is unavoidable, it should be factual, calm and no attempt should be made to cover gaps in knowledge.
- where possible legal advisors should be contacted for advice.

For further information regarding emergency procedures please consult the following documents:

[NG Section 4 – Good Practice](#)

[4.1a Off Site Visit Emergencies: The Employer’s Role](#)

[4.1c Off Site Visit Emergencies: Guidance for Leaders](#)

[4.1d/8.1d Visit Leader Emergency Action Card](#)

[4.1i Emergencies and Critical Incidents – An Overview](#)

## **Behaviour and Safety during the Visit**

Prior to the visit, staff must ensure that all participants understand what is expected of them. This includes any ‘rules’ that will be in place. These will be re-emphasised as appropriate during the visit. Monitoring of the visit must be ongoing, and this contributes towards both enjoyment and safety.

Pupils are expected to abide by St Margaret’s behaviour conduct when on educational visits.

It is primarily the responsibility of the Group Leader, in consultation with other staff where appropriate, to modify or curtail the visit or activity (e.g. Plan B) to suit changed or changing circumstances – for example: over-busy lunch area, rain, rising water levels, etc. Following the visit, the Group Leader should record any significant issues on their evaluation form, for both reference and to inform future visits.

## **Inclusion**

Educational visits and activities should be available to all students, regardless of background or abilities. Group Leaders must ensure that their provision meets the requirements of

- [The Equality Act 2010](#) (updated in June 2015)
- [The Disability Discrimination Act 1995](#)
- [The Special Educational Needs and Disability Act 2001.](#)

Guidance about inclusion can be found on the OEAP National Guidance [OEAP National Guidance 3.2e Inclusion](#) and **St Margaret’s School’s [Accessibility Plan](#)** of this policy. The National Guidance document also includes a section that provides detail for staff on the grounds that they are allowed to refuse permission (e.g. poor behavior) of a young person to participate in a particular event.

## **Insurance**

The Group Leader must ensure that the trip has appropriate insurance cover and that it insures all participants - staff and pupils.

Insurance cover is obtained for visits and activities which:

- Involve potentially hazardous activities
- For all other trips, insurance cover depends on the cost of the trip and the nature of the activities. Some cover may be provided through the School's own insurance policy, but staff should check with the school business manager and top up as necessary.

St Margaret's has £5M of Employers' Liability Insurance and £5M of public liability insurance, as well as a group travel policy that covers all but extreme and hazardous visits inside the UK and overseas.

Cover includes cancellation or delay, medical expenses, replacement of passports, personal possessions and money. The policy covers skiing holidays but does not cover all adventurous activities, such as climbing or scuba diving. Any member of staff organising an adventurous or hazardous activity should therefore check with the Director of Finance and Operations, whether or not the activity is covered by the school's policy. The actual insurance documents can be located on EVOLVE in the Documents section.

The Group Leader should ensure that they take a copy of the School's travel insurance documentation with them on all but the shortest of visits.

## Finance

St Margaret's School has the following 'code' for charging for visits:

- The charges that are encountered for organising school trips and activities are passed on to parents. If these costs are to be added to the School Bill, then parental permission will be required.
- For overseas trips and UK residential visits Group Leaders are to ensure that parents are made fully aware of the financial details of the trip. This is to include terms of payment, cancellation options and the School's charging policy. Advice is to be sought by Group Leaders in the early planning stages from the School Finance Office for all aspects of the financial elements of the trip (accounting, banking and reporting). Staff are advised to upload their **FORM 2. EDUCATIONAL VISITS – DETAILS FOR FINANCE OFFICE** (Appendix 3) with their Initial Approval Evolve Form (the form can also be located on the School's Intranet, in the Educational Visit Documents folder),

Group Leaders are responsible for:

- Collecting payments and lodging them with the Finance Office.
- Collecting spending money from the Finance Office and notifying the Finance Office about the required cash at least a fortnight before departure.
- Collecting receipts for items purchased with the cash obtained from the Finance Office and returning those receipts to the Finance Office.
- Returning any unused cash to the Finance Office.

Group Leaders need to be aware that all sums of money which are collected prior to the trip should be payable direct to St Margaret's School, deposited in the School's bank account and recorded by the School's Accountant. All cheques must have the pupil's name on the back. Deposits to tour operators can only be paid once all first instalments have been received by the Finance Office.

It is strongly advised that Group Leaders create a Google Spreadsheet of the list of pupils participating on the trip and share this document with the Finance Office so that billing can be organised.

## **Data protection**

The Data Protection Act of 2018 is designed to protect the privacy of individuals. It requires any personal information about an individual to be processed securely and confidentially. In a school setting, this includes information relating to both staff and pupils.

It is important that staff are well informed about the pupils whom they are taking out of School, however the protection of this data must also be considered. The Group Leader is in charge of distributing relevant information to staff. Depending on the length of the trip this may include confidential information about pupils' medical and dietary requirements as well as contact details of parents. The Group Leader is responsible for distributing this information as well as collecting it in again at the end of the trip so that it can be shredded. Staff should be informed of this issue during the pre-trip briefing. This is in accordance with the School's Data Protection policy.

It is expected that staff adhere to St Margaret's Policy on Data Protection during School visits just as much as on School premises.

For further guidance on data protection and visits see [4.4j Participant Information & Data Protection](#) of the National Guidance.

## Appendices

### Appendix 1 - GROUP LEADERS' CHECKLIST FOR OFFSITE TRIPS/ VISITS

I. Admin stration	1	I have added my proposed trip to the list circulated by the School's Calendar Administrator and gained 'approval in principal' (when required).
	2	I have completed all the relevant sections of my Evolve form and uploaded Form 2 (Finance Office form), Form 3 (Risk Assessment), the trip letter (checked and approved by the School Office Manager) and any additional information that might help the approval process.
	3	I have gained approval for my visit from my HoD, EVC and Head. <b>(All three are needed).</b>
	4	I have populated my visit by circulating the trip letter and gathered at least the minimum number of initial consent forms and deposits (when required).
	5	I have lodged the (initial) payments with the School's Finance Office.
	6	I have undertaken a preliminary visit (when appropriate).
	7	I have created a tag on iSAMS for participating students.
	8	I have obtained parental consent forms (Form 9) with medical and contact details and these have been copied and shared with relevant staff/providers.
II. Practi cal steps	9	I have contacted the School's Site Manager and requested a phone number to be attached to my phone. I have checked the number.
	10	I have arranged for the Finance Office to bill parents for the balance of the trip.
	11	I have contacted my EVC and found out who my SMT contact(s) will be [residential trips and trips returning after 17.30 only].
	12	I have completed a 'Pink Form' and notified the Catering Staff, Site Manager and IT support about certain requirements.
	13	I have arranged for an information evening for parents (where appropriate) and shared my emergency contact details with them.
	14	I have been briefed by the School Nurse on specific medical issues.
	15	I have completed my cover request Google Form and reminded accompanying staff to do the same.
III. Prior to	16	I have defined the roles and responsibilities of other staff (and young people) to ensure effective supervision, and have appointed a deputy. I have briefed my colleagues on the Risk Assessment, Emergency Procedures and any relevant medical issues.

<b>departure</b>	17	I have created a trip pack <b>no later than 2 weeks</b> before departure (see appendix 2) and shared a copy with: <ul style="list-style-type: none"> <li>• accompanying staff</li> <li>• SMT contact(s) (where appropriate)</li> <li>• EVC</li> <li>• School Office</li> </ul>
	18	I have picked up the First Aid kit(s) and epi pens (if applicable) from the School Nurse; I have collected the requested amount of spending cash from the Finance Office
<b>IV. During the trip</b>	19	I have picked up all the students from the School site (when appropriate).
	20	I have collected the ordered packed lunches (if requested).
	21	I have followed the School's Emergency Procedures (if required).
	22	I have kept my SMT(s), EVC, School Office and parents informed on delays.
<b>V. On return from the trip</b>	23	I have briefed my SMT contact(s) and EVC on the trip and completed my short evaluation on Evolve.
	24	I have dropped off the School's First Aid kit(s) with the School Nurse and returned the unused cash to the School's Finance Office.
	25	I have written up my Evaluation Report Form 7 (where appropriate) and handed/sent a copy to my EVC. I have sent photos and a summary of the trip to the School' Marketing Team.

**Appendix 2 – WHAT TO INCLUDE IN A TRIP PACK FOR RESIDENTIAL AND NON-RESIDENTIAL VISITS/TRIPS**

No.	Type of Document	
1.	Form 5 – Trips Summary Information	
2.	List of students attending the trip/visit	
3.	Trip itinerary	
4.	Form 3 – Risk Assessment	
5.	Provider’s risk assessment (when applicable)	
6.	Emergency Contact Details (with photos) obtained using Schoolbase tag	
7.	Medical details obtained using Schoolbase tag and emergency medical action cards produced by the School Nurse (if applicable)	
8.	Form 6 – Emergency Procedures on School Visits	
9.	St Margaret’s insurance documents	
0.	Provider’s insurance documents	
1.	Form 9 – Consent and Indemnity Forms for all participating students	
2.	Documents certifying provider’s LOTC Quality badge, AALA Licence or ATOL certificate (when applicable)	

**Appendix 3 - FORM 2**  
**EDUCATIONAL VISITS – EYFS – DETAILS FOR THE FINANCE OFFICE**

TRIP LEADER:

Trip to:

Date/s:

Venue Address:

Telephone:

Contact Name

**CHARGES & COSTS** - Once inquiries or provisional booking have been completed please ask the Finance Manager to advise you of the cost per pupil to be included in your letter to parents. Please ensure the Finance Manager receives a list of pupils to be charged, within a week after the trip has run.

<u>Total cost of trip (all inclusive)</u>	£	<u>Number of pupils and adults?</u>	
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**Either**

Price per pupil	£	Number of pupils on trip?	
Free adults	Yes/No	Number of free adults?	
Paying adults	£	Number of paying adults?	
Additional costs (e.g. travel, parking, spending money)			
In total:			
or			
Per pupil:			

**Or**

**BOOKING & PAYING** - Please ask for invoices to be sent to the accounts department. Inform accounts if there are any special payment requirements? (e.g. deposits, cheques on arrival etc.). If you require a cheque to be produced or you need cash, please complete a cheque requisition form or petty cash request at least two weeks before the trip.

**TRAVEL**

Departure time from school?		Departure time from destination?
Do you require a coach?	Yes / No	If so, how many seats do you require?

Do you require a minibus (16 seats)?	Yes / No	If yes, please ensure you have booked this through the online system.
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You will be advised of school departure and arrival times and whether special instructions regarding gates are needed.

**FOOD** - Is packed food required? If so, please complete pink catering request form, which can be found on the shared area

**Accounts Department** to fill in below. A copy of this form will be returned to Trip Leader.

Total cost of trip to be charged to each pupil.	£	Has the coach been booked?	Yes / No
Name of coach company.		Telephone number for coach company	
Has minibus been booked?		Time of vehicle departure from school ?	

**Appendix 4 – FORM 3  
RISK ASSESSMENT**

**RISK**

<b>Place(s) to be visited:</b>	
<b>Date of visit:</b>	
<b>Group Leader:</b>	
<b>Staff accompanying Trip:</b>	
<b>Number of pupils/Year Group:</b>	
<b>Transport Used:</b>	
<b><u>Potential Hazards</u></b>	<b><u>List controls/ Safety Measures</u></b>
<b>Action in case of Illness:</b>	
<b>Action in case of Injury:</b>	
<b>Action in case of Bad Behaviour:</b>	
<b>Signature of Group Leader:</b>	<b>Date:</b>
<b>Signature of EVC:</b>	<b>Date:</b>

**Appendix 5 - FORM 5**

**TRIPS SUMMARY INFORMATION**

<b>Trip Title</b>	
<b>Group Leader</b>	<b>Other Staff</b>
<b>Date of Trip Departure</b>	<b>Time Out</b>
<b>Date of Trip Return (if different from above)</b>	<b>Time In</b>
<b>Name of Destination and Address</b>	<b>Transport arrangements (inc name of coach company and phone numbers if applicable)</b>
<b>Contact mobile phone numbers:</b> <b>Name 1:                      Number:</b> <b>Name 2:                      Number:</b> <b>Name 3:                      Number:</b>	
<b>Pupil list attached</b>	<b>Yes</b>
<b>First Aid carried</b>	<b>Yes No</b>
<b>Medical alert details checked for pupils and recorded?</b>	<b>Yes No</b>
<b>Risk Assessment carried out and information shared among staff?</b>	<b>Yes No</b>
<b>Pupils' Response:</b> <b>Behaviour expectations communicated clearly?</b> <b>Contingency plan arranged for illness/injury/behaviour difficulties?</b>	<b>Yes No</b>  <b>Yes No</b>
<b>Do you have an Emergency Procedures Plan with you?</b>	<b>Yes No</b>
<b>If the trip returns after 5.30pm or is residential – Name and numbers of SMT contact.</b>	

<b>Signature of Group Leader</b>	<b>Date</b>
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**This form must be handed into the School Office with a list of pupils and a Risk Assessment attached before the trip departs.**

**If the trip is residential, copies must be left with the EVC and emergency SMT contact. Pupil contact details and an itinerary must also be included**

## Appendix 6 - FORM 6 – EMERGENCY PROCEDURES ON SCHOOL VISITS

A copy of this written guidance should be held by each adult member of the party.

**At the first opportunity the group leader should write notes on the details of any incident including timings, witnesses and any other relevant information.**

An emergency is difficult to define. It may be a fracture, food poisoning or a fatality, or any illness requiring immediate medical treatment. It may on the other hand be missing children who are soon found or a coach crash in which no serious injuries are sustained. The following notes are for guidance. The procedures listed will not apply to all emergencies.

1. Establish the nature and extent of the emergency.
2. Render first aid and attend to the casualty(ies).
3. Ensure all other members of the party are accounted for and safe.
4. If there are injuries, establish their extent and administer first aid **if you are qualified to do so**. (Be aware of the consequences that might follow if you were to give incorrect treatment).
5. Call the appropriate emergency services.
6. The **group leader** should advise other staff of the responsibilities to be undertaken by each of them.
7. Ensure that an adult accompanies any casualties to hospital. If only one adult is available in the circumstances a decision will have to be reached as to the best course of action.
8. Ensure that remaining pupils are supervised and arrange for an early return to base.
9. Students should not be allowed to use mobile telephones until the group leader has given permission to do so.
10. Arrange for one adult to remain at the site of the incident to liaise with the emergency services until the incident is over, if necessary.
11. Contact the senior member of staff on call at school (or a previously arranged contact person if incident takes place out of school hours):

**School Office** 020 8416 4400

12. Give full details of the incident including:
  - Names of persons involved and their contact details.
  - Nature, location and time of incident.
  - Details of any injuries.
  - Action taken so far.
  - Action yet to be taken.
  - Telephone numbers of staff on trip.
13. No members of staff or students should discuss matters with the media.
14. **Legal liability should not be discussed or admitted.**
15. Inform parents of any delays.
16. Notify the British embassy if an emergency occurs abroad.
17. Refer any queries from media/external sources to the school where these will be dealt with by the senior member of staff on duty.
18. Write down all relevant details whilst still fresh in the memory. Other group leaders may be asked to do the same. A record should be kept of names and addresses of any witnesses. Keep any equipment involved in its original condition.

#### **AT SCHOOL AT THE TIME OF THE INCIDENT**

19. The senior member of staff on duty will identify alternative and additional telephone lines as needed.
20. The senior member of staff at school will contact the Head and they will establish who will take charge of the situation and what immediate action will be taken. The Head will advise the Chair of Governors.
21. The senior member of staff on duty will arrange to contact parents/carers of those involved as soon as possible. For a serious incident the senior member of staff on duty should contact parents of all party members. It is also the responsibility of this person to act as a link between the group involved, the Head, and parents.

#### **ON RETURN TO SCHOOL**

22. The named leader of the trip should see the Director of Finance and Operations to debrief and to complete all accident forms.

**Keep these emergency procedures to hand and ensure you have the means of implementing them.**

## Appendix 7 - FORM 7 EDUCATIONAL VISITS – EYFS - EVALUATION FORM

Please fill in relevant sections.

<b>Trip Destination:</b>	<b>Date of Trip:</b>
<b>Staff Leader:</b>	<b>Other Staff:</b>
<b>Purpose of Visit:</b>	<b>Company Used:</b>
<b>Number in Group:</b>	<b>Year Groups involved:</b>

Please Comment on the Following features where they apply

<b>Evaluation Point</b>	<b>Rating out of 10</b>	<b>Comment</b>
<b>The Company's pre-visit organisation</b>		
<b>Travel Arrangements</b>		
<b>Quality of Programme provided</b>		
<b>Suitability of Accommodation</b>		
<b>Guide/company representative</b>		
<b>Evening Activities</b>		
<b>Was your risk assessment adequate? Were there any areas it did not cover?</b>		
<b>Were there any pupils who were outstanding representatives of the school?</b>		
<b>Were there any pupils whose behaviour fell below expectations?</b>		
<b>Were there any accidents or injuries (including near misses)?</b>		

<b>Do you have any suggestions for improvement if the trip were to run again?</b>	
<b>Any other comments?</b>	

**Signed:**

**Date:**

To be completed after all trips and logged with the school's EVC.

## Appendix 8 – FORM 8

### REPORT OF ACCIDENT OR DANGEROUS OCCURRENCE ON SCHOOL VISITS

An accident form **MUST** be completed if, following an accident:

- The emergency services have been called.
- Parents/guardians have been asked to collect a pupil from visit.
- Parents/guardians have been informed directly by staff.
- First Aid has been administered.

An accident form **should** also be completed if an accident:

- Warrants concern in any way that there might be any chance of long term consequences.

**1. THE ACCIDENT FORM MUST BE COMPLETED WITHIN 24 HOURS**

**2. THE FORM MUST BE SENT TO THE HEAD, DIRECTOR OF ESTATES AND OPERATIONS MANAGER, SCHOOL NURSING SISTER AND THE EVC.**

**3. ALL COMPLETED FORMS ARE EVENTUALLY KEPT BY THE ESTATES AND OPERATIONS MANAGER AS THE H&S CO-ORDINATOR**

#### Accident involving a child

If a pupil/child is involved in an accident, the first adult who is called to the scene should complete the accident form on their behalf.

#### Accident involving an adult

If an adult is involved in an accident, that adult is responsible for completing the accident form. Only if the adult is unable to complete the form, should the first adult who is called to the scene complete the accident form on his or her behalf.

Name, Address and Telephone Number of person who has had the accident	
Name, Address and Telephone Number of person reporting	
Date & Time of Incident	
Place of Incident	

Full details (include activity, machinery/ equipment involved, chemicals, height of falling object etc Nature of any injury and medical action taken)

Signature of person reporting:

Date:

Notify Insurance Company?	Y	N	Date	
RIDDOR reportable?	Y	N	Date	

**FOR DIRECTOR OF FINANCE AND OPERATIONS' USE (tick box and date when completed)**

## Appendix 10 - COACH QUOTE REQUEST

<b>Outbound Date</b>	
<b>Destination</b>	
<b>Time to Arrive at Destination</b>	
<b>Suggested Time To Depart from St Margaret's</b>	
<b>Return Date</b>	
<b>Destination</b>	
<b>Time to depart venue</b>	
<b>Arrival time back at St Margaret's</b>	
<b>Total Number of Passengers</b>	
<b>Total Pupils</b>	
<b>Total Adults</b>	
<b>Trip Leader</b>	
<b>Trip Leader Mobile Contact (For Emergency)</b>	
<b>To be supplied by Operator</b>	
<b>Cost</b>	