RUGBY SCHOOL

BILTON GRANGE
PREPARATORY SCHOOL

Educational Visits Policy

April 2025

Introduction

Educational trips and visits are a very important part of the co-curricular life of the School. Bilton Grange and Rugby School will both be referred to as 'the School' for the purpose of this policy.

Benefits of participating in educational visits include:

- Enhancing curricular learning;
- Providing opportunities to learn and practise new skills;
- Developing communication and teamwork skills;
- Providing opportunities for service and helping others;
- Developing independence, responsibility, resilience, adaptability, and self-confidence;
- Providing opportunities to experience other cultures and broaden horizons.

Scope of the Policy

For the purpose of this policy, the terms 'trips' and 'visits' are interchangeable and are defined as any event involving students away from the School's premises on regulated school activities (i.e. work that a barred person must not do).

The range of trips and visits covered by this policy includes (but is not limited to):

- 'Away' sporting fixtures;
- Visits to local amenities (e.g. local school, theatre, restaurant);
- Non-residential visits taking place both during and beyond the normal school day;
- Residential visits in the UK and overseas;
- Adventurous activities including Duke of Edinburgh expeditions and CCF activities.

All full-time and part-time staff (including peripatetic music staff and sports coaches) are required to plan and execute trips and visits in line with this Educational Visits Policy.

The term '*must*' indicates that an action is obligatory and often legally required. The term '*should*' indicates that the advice should be followed unless there is good reason not to.

Policy Aims

Through the operation of this policy, the School aims to protect the health and safety of students and staff involved in educational visits.

All educational visits, whether day or residential, in the UK or abroad, involve an element of risk, and in many cases, dealing with this forms part of the value of the visit. It is not the School's aim to eliminate all risk but rather to ensure that reasonable and practicable steps are taken to establish conditions where the level of risk is manageable and acceptable. The School aims to make educational visits available to all students, and wherever possible, make them accessible to those with special requirements by ensuring that reasonable adjustments are made.

National Guidance, Legislation and Associated Policies

In addition to this Educational Visits Policy, the School has adopted the '*National Guidance*' provided by the Outdoor Education Advisers' Panel (OEAP) [www.oeapng.info] for the management of off-site visits. The OEAP is the lead body for guidance, advice and training related to outdoor learning and educational visits in England and Wales. National Guidance provides staff with up-to-date information

and resources to help them carry out their duties with regards to the safe planning and execution of trips and visits.

The Educational Visits Policy has been written with reference to the following guidance and legislation:

- *Health and Safety on Educational Visits* H & S on Educational Visits
- *Health and Safety: Responsibilities and Duties for Schools* H & S: Responsibilities and Duties for Schools
- *Health and Safety at Work Act 1974* H & S at Work Act 1974
- *Management of Health and Safety at Work Regulation 1999* Management of H & S at Work Regulation 1999
- *Adventure activities Licensing Regulations 2004* AAL Regulations 2004
- *Annex D of KCSIE* (Keeping Children Safe In Education/Annex D).

The Educational Visits Policy should be read in conjunction with the following associated Rugby School policies and guidance:

- *Critical Incident Management Policy*
- *Equal Opportunities Policy*
- *First Aid Policy*
- *Health and Safety Policy*
- *Medical Care Policy*
- *Minibus Policy*
- *Risk Assessment Policy for Student Welfare*
- *Safeguarding and Child Protection Policy*
- *Supervision Policy*
- *Code of Conduct*
- *Purchasing Policy*
- *Credit Card Policy*
- *Staff Expenses Guidance Notes*

Roles and Responsibilities

It is a legal expectation that all employees work within the requirements of their employer's guidance, therefore, staff should follow the requirements of this policy document and National Guidance recommendations from the OEAP. In the event of any apparent conflict between the Educational Visits Policy and National Guidance, the Educational Visits Policy should be followed, and clarification sought from the Educational Visits Coordinator (EVC) or Deputy Head.

a) Employer (The Governing Body of Rugby School)

Under the *Health & Safety at Work Act 1974*, it is the duty of the employer to ensure, so far as is reasonably practicable, the health and safety of school staff and students. Health and Safety management responsibilities are delegated by the Governing Body of Rugby School to members of staff including the Head Master (Rugby School) / Head (Bilton Grange), Deputy Head, Educational Visits Coordinator, Visit Leader and other assisting staff at the respective school. All visit staff should accept responsibility for the care and welfare of students, and act in *loco parentis*.

b) **Head Master**

The Head Master of Rugby School or Head of Bilton Grange (each referred to in this policy as 'Head Master') should:

- Ensure that educational visits comply with legislation, regulations and guidance issued by the Health & Safety Executive, and the Department for Education, together with that provided by the Governing Body of Rugby School, and the School's Health and Safety Policy;
- Ensure that the appointed EVC is sufficiently qualified, experienced, and competent to administer, manage and monitor educational visits;

c) Deputy Head

The Deputy Head should:

- Monitor and review the work of the Educational Visits Coordinator (EVC), including regular meetings;
- Have an overview of the educational visits programme, reporting to the *Risk and Compliance sub-committee* of the Governing Body, as required;
- Manage the educational visits programme in conjunction with the Deputy Head (Co-curricular) [Rugby School] / Assistant Head (Co-curricular) [Bilton Grange], and the EVC;
- Along with the EVC, assess the suitability of trips and planning procedures as part of the educational visits' approval process;
- Act as an emergency point of contact at school for Visit Leaders as part of the Critical Incident Management team;
- Provide guidance on the School's expectations in terms of supervision, behaviour, professional standards, managing issues and individual needs on trips and visits.

d) Education Visits Coordinator (EVC)

The EVC is appointed by the Head Master. The EVC should have suitable skills and experience regarding educational trips, and have sufficient status to guide the working practice of colleagues involved in leading and assisting with trips and visits.

The EVC should:

- Promote educational visits and trips as an enriching part of school-life;
- Ensure that educational trips and visits are planned, approved and managed in accordance with the Educational Visits Policy and associated procedures, including aspects such as trip scheduling, risk management, staffing, supervision, medical matters and communication;
- Provide support, advice and training to staff regarding the planning and running of educational trips and visits;
- Manage the use of the EVOLVE trip management system, including providing training for staff, as required;
- Keep up to date with legislation and best practice regarding trips (e.g. *National Guidance* updates), updating the Educational Visits Policy, as required;
- Assess the competency of Visit Leaders and trip staff;
- Ensure that suitable staffing arrangements (number, experience, skills, training) are in place for educational visits;
- Track staff involvement in educational trips and visits, and encourage the development of relevant skills and experience amongst staff as part of succession planning;
- Ensure that educational visits are reviewed, evaluated and monitored to help to inform future trip planning, training needs, and the reporting of accidents;
- Keep records of trips and visits, including participants, itineraries, staffing, and accident or incident reports;

- Act as an emergency point of contact at school for Visit Leaders as part of the Critical Incident Management team;
- Report the details of forthcoming holiday trips to the Senior Management Team [Rugby School] / Senior Leadership Team [Bilton Grange] in advance of each holiday period;
- Ensure that appropriate trip information is available to key staff with regards to Critical Incident Management.

e) Visit Leader

Visit Leaders have a legal duty of care and their execution of duties related to trips and visits must comply with the Educational Visits Policy, other relevant policies, and associated procedures. The Visit Leader has overall responsibility for leading and managing the visit, including the health and safety of all participants (students and staff).

The Visit Leader should:

- Liaise with the Deputy Head, Deputy Head / Assistant Head (Co-curricular) and EVC regarding the scheduling, planning and management of trips and visits;
- Use the EVOLVE trip management system to provide all relevant trip information, adhering to the required timeframe;
- Ensure that the visit has clear aims, and that planning carefully considers the benefits and risks, and needs of individuals;
- Communicate with parents, students and staff in an accurate, detailed and timely manner regarding trip planning and arrangements;
- Obtain parental consent (e.g. for residential trips, adventurous activity), and up-to-date and relevant information prior to the trip (e.g. medical conditions and medication, dietary requirements (especially regarding allergies), Special Educational Needs, emergency contact details);
- Have overall responsibility for the identification of hazards and assessment of risks before and during the trip, drawing up and implementing (in conjunction with assisting staff) suitable risk management measures to mitigate risks to an acceptable level;
- Retain overall responsibility for the health and safety of all participants during the trip, which involves the ongoing assessment and management of risks (e.g. monitoring the suitability of activities, conditions, and the behaviour and wellbeing of students, making adjustments as necessary);
- Brief assisting staff on their roles and responsibilities (e.g. regarding risk management and effective supervision), and provide staff with important trip information (e.g. specific needs of students, medical matters, itinerary, contacts, emergency procedures);
- Brief students regarding the trip e.g. arrangements, supervision, risks and safety control measures, expected behaviour, emergency procedures;
- Manage financial matters of the trip including costing (trips should be self-financing), payment schedule, budgeting during the trip, record keeping of expenditure, and the reimbursement of any surplus funds to parents after the trip;
- Consider GDPR requirements regarding the sharing and safekeeping of personal information relating to participants and parents;
- Review and evaluate the trip relative to its aims, also reporting incidents, accidents, 'near misses' and 'lessons learnt'.

Safeguarding

Safeguarding is of paramount importance for Visit Leaders and assisting staff when planning and running all types of trips and visits. Staff should refer to the School's 'Safeguarding & Child Protection Policy' and all aspects of this policy apply on school trips and visits.

All students participating in a trip have a right to feel safe and supported at all times. To ensure that this is possible, the needs of individual students should be considered prior to accepting a student on a trip or visit. The School reserves the right to decline to take a student on an educational trip or visit if doing so would not be in the best interests of the student, other students or accompanying staff.

a) Risk Management

The EVC has undertaken Designated Safeguarding Lead training and is delegated the responsibility by the School's Designated Safeguarding Lead (DSL) to approve visit risk assessments and control measures related to safeguarding matters. The EVC should consult with the DSL prior to approval regarding any new or unusual circumstances on a planned visit that may result in elevated safeguarding risks.

All trip staff have a responsibility to safeguard and promote the welfare of students during educational trips and visits, so safeguarding and child protection matters should be given significant consideration during the assessment and management of risks during the planning process and during the trip.

Through communication with school staff, parents or other relevant organisations, Visit Leaders should ensure that they are informed of any students who may be particularly vulnerable or have specific safeguarding needs and ensure that assisting staff are aware. In such cases, a specific risk assessment will be required.

b) Vetting and DBS Checking

School employees and volunteers who work frequently or intensively with, or who have regular access to students, must undergo an enhanced DBS check as part of their thorough recruitment process.

Visit Leaders should verify with Human Resources at least 2 months prior to departure, that any volunteers have had the necessary checks in line with legislation and the School's policy before they are permitted to participate in the trip or visit. Human Resources will provide written confirmation that volunteers are permitted to participate. Without this written confirmation, no volunteer is permitted to participate.

c) Safeguarding concerns during a trip or visit

If safeguarding concerns arise during a school trip or visit, they should be reported using the School's normal safeguarding concerns reporting system (CPOMS). If required, staff can contact the Deputy Head for advice (e.g. via a Trip Managements *WhatsApp* group), or contact the Critical Incident Co-ordinator via the 'red phone' number (see later section on Critical Incident Management).

d) Homestay trips

For visits which involve host families, either in the UK or abroad, the School will have due regard to the advice given by *Annex D of KCSIE* (Keeping Children Safe In Education/Annex D). The EVC and Deputy Head will advise on the suitability of the adults in host families and the hosting arrangements.

As it is not possible to obtain criminal record checks from the DBS about adults who provide homestays abroad, the School will liaise with its partner schools to establish a shared understanding of, and agreement to, the arrangements in place for the visit. Together, they will use their professional judgement to satisfy themselves that the arrangements are appropriate to effectively safeguard the

students who will take part in the homestay. Parents must be made aware of the supervision arrangements.

For language trips where students stay with a host family, the Visit Leader must contact the host School or organisation in advance, and the two parties must agree a shared commitment to safeguarding for the duration of the trip. Host families should be made aware of arrangements and expectations (e.g. permitted activity, curfew times, supervision, school rules).

Staff Competence, Visit Leader Approval & Training

a) Competence

Staff competence is a crucial factor in trip safety management. Competence to lead or assist with a trip is established by considering a combination of skills, knowledge, experience, awareness, judgement and training. Staff are supported in developing their competence through:

- apprenticeship, where less experienced visit staff assist, work alongside and are supervised by more experienced staff and Visit Leaders;
- training courses (e.g. ski trip leader, DofE) and training provided by the EVC.

b) Visit Leader Competence Assessment

Visit Leader competence is assessed by the EVC, who considers:

- Relevant experience e.g. prior experience of assisting with or leading other trips;
- Relevant skills and interests;
- Training and qualifications e.g. First Aid, Mountain Leader;
- Prospective Visit Leader's ability to make appropriate risk management decisions, manage a group of students and staff, and deal with an emergency, if required (e.g. by considering their group management and supervision skills, and roles and responsibilities within their day-to-day work at school);
- The nature of the specific visit (location, activities, students, staffing).

Based on this professional judgement, the EVC will determine the level at which the staff member may operate:

- Assisting staff – support the Visit Leader on a trip or visit, gaining experience;
- Day Visit Leader – non-residential, within the UK;
- Residential Visit Leader (UK) – lead a visit involving overnight accommodation;
- Residential Visit Leader (overseas) – lead a residential trip in another country involving overseas travel.

c) Training

A range of training opportunities are available to staff:

- Educational Visits training and updates provided by the EVC;
- Visit Leader training provided by the EVC;
- Bespoke advice and support for Visit Leaders provided by the EVC;
- Specialist training courses from external providers e.g. Mountain Leader, DofE Supervisor, First Aid & Administration of Medication (required for residential trips);

- EVC training and Visit Leader training provided by external agencies e.g. the Royal Geographical Society.

Staffing, Effective Supervision, Headcounts & Rollcalls

a) Staffing

Staff to student ratios are not prescribed by law. Decisions about the staffing and effective supervision arrangements should be made within the risk assessment process and must consider the nature of the trip. A useful framework for assessing the staffing and supervision requirements involves the STAGED approach:

- *Staff*: staff experience, competence, training, qualifications;
- *Travel*: means (e.g. airplane, ferry) and duration of travel, staff driving vehicles and for how long (permitted driving and working hours);
- *Activities*: nature of activity, led by school staff or by an external provider (suitable accreditation e.g. *LoTC badge*, staff qualifications and training), accommodation arrangements;
- *Group*: number, age range, specific needs, experience, aptitude, behaviour, group dynamics;
- *Environment*: indoors or outdoors, location (e.g. urban, rural, remote), terrain (e.g. challenging, significant hazards), season and weather conditions;
- *Distance*: UK (distance from school, distance from emergency support), overseas.

Staffing costs (e.g. travel, accommodation, subsistence) must be considered when calculating the trip cost to parents.

Whilst external provider staff may be used to supervise and instruct (e.g. adventurous sports activities, field centres), responsibility for student welfare remains with the Visit Leader and assisting school staff.

It is advisable to have 2 members of staff accompanying a day visit, however, in some cases, supervision by one member of staff is acceptable (e.g. an away sports fixture with a team). In making such a decision the nature of the trip should be considered. It is compulsory to have at least 2 members of staff on overnight trips and visits, unless given specific permission by the Deputy Head, who will consider the risks and mitigating circumstances.

There is no requirement for students to be accompanied by staff of the same sex, but if this is not the case, there should be a sound plan to manage foreseeable issues, including the need for privacy, effective supervision and providing suitable pastoral support. For residential trips, there should be staff of the same sex as the participating student, apart from in exceptional circumstances where the Deputy Head will make the decision.

Where trips and visits are to more remote areas (e.g. Gold DofE expeditions), or where more challenging activities (e.g. skiing) are undertaken, higher levels of staffing will be required.

A general guide for consideration regarding staffing is given below. Visit Leaders should assess the risks and consider the appropriate level of supervision required for their specific trip using the STAGED approach. Staffing arrangements are ratified by the EVC and Deputy Head during the trip approval process.

- 'Away' sports fixture:
    - 1 member of staff per team, but 2 members of staff if using a self-driven minibus or if only one team is travelling on a coach;

- 1 member of per team of up to 15 students (Bilton Grange).

- Day Trips (UK), lower risk activity e.g. museum visit:
  - 1 member of staff per 10-15 students (D, E, F Block at Rugby School);
  - 1 member of staff per 15-20 students (XX, LXX at Rugby School);
  - 1 member of staff per 10 students (Year 4 to Year 8 at Bilton Grange);
  - 1 member of staff per 6 students (Reception to Year 3 at Bilton Grange).

- Non-adventurous, residential (UK or overseas):
  - 2 members of staff with the first 20 students at Rugby School, then:
    - 1 member of staff for every 10 students (D, E, F Block)
    - 1 member of staff for every 10-15 students (XX, LXX)
  - 1 member of staff per 10 students (Year 4 to Year 8 at Bilton Grange);
  - 1 member of staff per 6 students (Reception to Year 3 at Bilton Grange).

- Adventurous or challenging location, residential (UK or overseas):
  - 2 members of staff with the first 10 students at Rugby School, then:
    - At least 1 member of staff for every 10 students (all years).
  - 1 member of staff per 10 students (Year 4 to Year 8 at Bilton Grange);
  - 1 member of staff per 6 students (Reception to Year 3 at Bilton Grange).

- For *Early Years* (up to the age of 5) trips at Bilton Grange, there should be at least as many adults to children as there would be in childcare provision, and generally more as befits an off-site trip. Best practice should be considered and therefore assessments made as to the necessity to increase the staff:children ratio to ensure that all children will be kept safe. This should be risk assessed according to the needs of every child. External providers must ensure that children will be adequately supervised and safely deployed so risks are minimised. A general guide should be followed of:
  - 1 staff member for every 5 children in Reception;
  - 1 staff member for every 3 children in *The Nest*.

b) Effective Supervision

The responsibility for supervision is continuous during a trip, even when students are unaccompanied at times or at night. It is important that suitable supervision arrangements are maintained during 'downtime' as well as during organised activities.

Supervision can be *direct*, *indirect* or *remote*. The type of supervision will influence the staffing requirements.

- Direct Supervision:
  - When students remain in sight of, and in close contact with supervising staff.

- Indirect supervision:
  - When students are given some freedom to explore an area or engage in an activity away from direct supervision, but within clearly defined boundaries.
  - Key points to consider with indirect supervision:
    - The nature of the group (number, age range, specific needs) and location (level of congestion, traffic, unfamiliar surroundings, terrain) before permitting indirect supervision;
    - Staff are in the vicinity, so direct supervision can be re-established if required;

        - Students are briefed on geographical boundaries, timings, permitted activity, group sizes, hazards, location of staffing and the meeting point;
        - For younger students, more stringent parameters will be required;
        - If overseas, it is good practice for students to carry key information in the local language (e.g. emergency contact for staff, accommodation details).

- Remote Supervision:
    - Occurs when students are operating at such a distance that direct supervision would take significant time to re-establish e.g. DofE Gold expedition. For this type of supervision to be appropriate, school staff must decide that the students are capable of operating safely away from direct or indirect supervision;
    - Can provide invaluable educational benefits such as developing independence, resilience, teamwork and decision-making skills;
    - Provides a monitoring and emergency response role, where staff should be able to assist within a reasonable time frame if there is cause for concern;
    - When remote supervision is permitted:
        - The group should be suitably trained (e.g. First Aid) and assessed as competent (using the STAGED approach) for the planned activity and environment;
        - The group should be familiar with emergency procedures, including how to contact school staff and emergency services, and meeting points;
        - The group should be clearly briefed regarding physical parameters (including hazards), risk management and expected behaviour;
        - The group's progress should be monitored by staff (including 'check-ins' with the group), and adjustments made to supervision arrangements, as required;
        - Parents should be aware of remote supervision arrangements in advance of the trip.

c) Headcounts and Rollcalls

Effective supervision is a key part of the ongoing risk management process and the level of supervision is likely to vary throughout the trip or visit. 'Lost student' incidents are more likely to occur during 'downtime', travel or during transitions in transport or activities. Regular headcounts and rollcalls should be employed as important supervision and safeguarding tools.

Good practice includes:

- Having easy access to an up-to-date register of participants;
- Positioning staff strategically when travelling e.g. at the front and back when on foot;
- Carrying out checks immediately before and after transport and activities;
- Increasing the frequency of checks in congested areas and with younger students;
- Particularly with younger students and in congested areas (e.g. London; underground), subdivide the cohort into smaller groups, with a member of staff in charge of each sub-group;
- Ensuring that assisting staff have access to key information (e.g. contact details);
- Ensuring that everyone is aware of the emergency procedure to employ if separated from the group.

Educational Visits Approval, Notification

All proposals for educational trips (others than sports fixtures and other weekly co-curricular activities) must be submitted for approval by the EVC and Deputy Head in accordance with the School's educational visits and calendar-scheduling procedures. The Visit Leader should use the School's trip management system (EVOLVE), for all trip planning administration and communication. No communication with parents, contracts with tour operators, nor payments should be undertaken until after the trip has been approved by the EVC and Deputy Head.

Note: Sports fixtures and other weekly co-curricular activities are approved by the Deputy Head (co-curricular), and the relevant senior staff (e.g. Director of Sport) are responsible for the planning, risk management and notification processes.

Approved educational trips and visits should be listed in the termly calendar. Notice of the details of day trips and residential trips should be made available to school staff well in advance of departure in line with the School's timeframe within its procedures.

On a regular basis (e.g. every half term), the EVC will notify the Senior Management Team [Rugby School] / Senior leadership Team [Bilton Grange] about the arrangements (including staffing and supervision) for the forthcoming residential trips and visits in the UK and overseas.

Places on residential educational trips should normally be allocated on a 'first come, first served' basis, unless stated otherwise in the letter to parents, for example, where players are needed for specific positions in a team on a sports tour. The School also reserves to right to vet the suitability of students in liaison with the School's medical team before confirming places on prolonged and particularly challenging trips (e.g. an extended trekking expedition to a remote area).

EVOLVE visits (EVOLVE) Trip Management System

EVOLVE is the online system used within the School for the planning, approval and management of educational trips and visits. Key information (e.g. student list, staffing arrangements, risk assessment, trip itinerary and contacts details) is uploaded on to the EVOLVE form by the Visit Leader. The form also includes a chronological record of trip dialogue and decision-making. The Evolve Form information and uploaded attachments are available to key staff in the event of a Critical Incident. The EVC provides training for staff on the use of the EVOLVE trip management system, as required.

EVOLVE Visit Forms must be completed by Visit Leaders for all off-site, residential and day trips and visits, apart from for scheduled sports fixtures and other scheduled, off-site activities that are part of normal, weekly school activity (e.g. Rugby School 360 community service activities). A Local Area Visit (LAV) Form can be used for low-risk, offsite activities in the local vicinity.

Visit Leaders are responsible for providing accurate information on the EVOLVE Visit Form (or LAV Form) for planned trips and visits, and submitting the form for Outline Approval according to the School's required timeframe. *Outline Approval* signifies that a trip has been ratified, at which point, a planned residential trip can be advertised to students and parents. Payment of invoices and financial agreements with providers (e.g. tour operators) should not be undertaken until after Outline Approval has been granted.

After receiving Outline Approval (from the Deputy Head and EVC), the Visit Leader is responsible for the completion and submission of the remainder of the EVOLVE Visit Form, including uploading the documents required (e.g. risk assessment, list of participants, travel arrangements, staffing). Trip planning and risk management arrangements are checked by the EVC before *Full Approval* is granted.

After a trip or visit, the Visit Leader should complete the evaluation section on the EVOLVE form, where the Visit Leader assesses the success of the trip against the aim and reports on any accidents, incidents, 'near misses' and lessons learnt'. In addition, the EVC will meet with the Visit Leader of residential trips to review the trip and to inform future trip planning.

Monitoring

The health and safety arrangements of educational visits and associated activity are monitored to check that what happens in practice is consistent with the Educational Visits Policy, procedures and expectations. Monitoring is carried out by the Deputy Head, Deputy Head (Co-curricular) [Rugby School] / Assistant Head (Co-curricular) [Bilton Grange] and EVC, who will scrutinise both the planning procedures beforehand, and field observation of a sample of trips and visits.

In practice, this involves monitoring to ensure that:

- Visits are planned and carried out safely and effectively in line with the Educational Visits Policy and procedures, including approval, communication and risk management processes;
- Policies and procedures are reviewed and updated in line with legislation, official guidance (e.g. gov.uk) and good practice *(OEAP National Guidance*);
- Staff have access to the Educational Visits Policy and OEAP National Guidance;
- Staff have access to relevant training, and this is carried out (e.g. First Aid);
- The EVC undertakes relevant training and keeps abreast of changes in legislation, official guidance and best practice (OEAP);
- Accidents, incidents, near misses and concerns are reported and responded to;
- Trips and visits are reviewed and evaluated to inform planning and running of future trips and visits;
- Appropriate records are kept;
- There are procedures in place to effectively manage emergencies and critical incidents, and that these procedures are followed.

Risk Management

Educational visits involve balancing benefits and risks. Risk management should be used as a tool to facilitate the participation in beneficial activities with suitable safety measures, rather than prevent visits and activities from occurring. Risk management should employ a common sense and proportionate approach, employing suitable and sufficient safety control measures to actual, significant and foreseeable risks.

Risk management for an educational visit is a 2-stage Benefit/Risk assessment process:

- Identifying the potential benefits, and significant hazards and risks;
- Plan safety control measures to reduce the risk as low as practicably reasonable.

A professional judgement is required to decide whether, in order to gain the benefits, that the residual level of risk is acceptable after the control measures are implemented. Competent Visit Leaders (along with the EVC) are required to make such decisions and ensure that risk control measures are implemented.

Risk management should be a collaborative process involving all participants (students, school staff, external provider staff). It is also a dynamic and ongoing process that should continue throughout the trip or visit.

Visit Leaders are required to produce a written record (Risk Assessment) of the risk management process, apart from for the most routine visits in the local area (e.g. *Local Area Visit* to a church in Rugby), which are covered by standard safety procedures within Bilton Grange and Rugby School. It is good practice for the Visit Leader to involve staff and students in the risk management process, as appropriate. Generic risk assessments are available (e.g. for coach travel), however it is the responsibility of the Visit Leader to adapt these in line with the specific features and needs of the trip being planned. The STAGED approach is a useful tool when considering the severity of risks on different trips and visits.

It is vital that risk management information is communicated to assisting staff (school and external) and students, who all have a significant part to play in the management of risk. The Visit Leader should allocate roles and responsibilities to assisting staff regarding the implementation of risk control measures. Risk management is a dynamic and ongoing process and staff should weigh up the benefits and risks throughout the visit, making adjustments, as required. If changes in circumstances (e.g. severe change in weather conditions) dictate, where the risks rise to an unacceptable level, the activity should be amended or curtailed. It is good practice that a 'Plan B' (contingency plan) is considered during the planning process.

Transport

Careful thought must be given to planning transport for off-site educational trips and visits. Statistics demonstrate that transport is the highest risk area associated with school trips and visits. All national and local regulatory requirements must be followed in the UK and abroad.

The School's 'Minibus Policy' and associated procedures must be adhered to with regards to staff driving minibuses or transporting students in other vehicles (e.g. privately owned car).

If there is a reason why a member of staff should no longer drive a vehicle to transport students (e.g. medical reason, driving endorsements), this must be declared to the Operations Director.

It is a requirement of the School's Minibus Policy that staff must hold a category D1 entitlement for driving 17-seat minibuses on their license, and a category B entitlement for driving 14-seat minibuses. Minibus drivers must have completed and hold an up-to-date MIDAS (Minibus Driver Awareness Scheme) training qualification. The School's Head Porter is a trained and certified MiDAS Minibus Driver Assessor and Trainer, and is responsible for the provision and management of MIDAS training.

When planning a journey, the level of supervision required should be carefully considered as part of the risk assessment process (e.g. using the STAGED approach), so that students are properly supervised at all times whilst on school-arranged transport.

Where required, the School should make reasonable adjustments and try to ensure that the mode of transport is accessible for all participants e.g. consider the needs of wheelchair users.

The Visit Leader should ensure that coaches are hired in the UK from companies approved by the School. Accredited tour operators take on the responsibility of hiring reputable companies when booking overseas transport.

Financial matters

The purpose of the financial procedures is to ensure that there is adequate control over income and expenditures relating to trips, and to protect both the School and parents from potential loss.

In the first instance regarding financial matters, for trips at Rugby School, staff should speak with Debbie Wawra (dwa@rugbyschool.net), or Fiona Bowen (flb@rugbyschool.net), for trips at Bilton Grange, both of whom will help guide staff through the process from a finance perspective. They can also help with budgeting and getting quotes.

For overseas residential trips, Visit Leaders should negotiate with tour operators (trips over £10,000 require three quotes) to provide competitive quotes that meet the aims and needs of the trip. The Finance Director can agree to a waiver of this 'three-quote' requirement or for a tour operator to become a 'preferred supplier' for up to three years before further competitive quotes should be sought again.

The Trip Leader should undertake due diligence to assess the reliability and reputation of the operator (and other providers), alongside the quality of provision, and value for money. This means that the lowest price might not always be the best option. Appropriate accreditation checks (e.g. ATOL, LoTC) should also be undertaken. The Visit Leader should clarify which services are being provided to avoid 'hidden costs' or doubling up on services (for instance with unnecessary insurance as this is provided by the School). All financial agreements and charging for activities and services must be confirmed in writing.

After a residential trip has received Approval via EVOLVE from the EVC and Deputy Head, the Finance Team will set up an account for the receipt of funds from parents and payment of invoices to providers. Places on a residential trip are confirmed on receipt of the deposit payment, and confirmation from parents to agree to the 'terms & conditions' of the trip.

a) Budgeting

All significant trips should be self-financing with the total cost to parents covering all expenditure. The Visit Leader should calculate the total trip cost considering all expenses including the cost of staff expenses (e.g. accommodation, transport, subsistence). A reasonable contingency amount should be added to account for any extra cost incurred during the trip. Parents should be made aware if the trip cost may change depending on the number of participants.

It is important that the budget for the trip covers all of the costs, so that the School does not end up with a shortfall at the end of the trip - it is easier to return funds to parents than to obtain further payments afterwards.

b) Paying for Trips

Bank account details for making payments are available from the Bursary staff. All trip payments (apart from 'lower cost' trips) should be received in advance of departure of the trip. Depending on the nature of the educational visit, this may be either by direct bank-to-bank payment from the parents to the School, or it may be via the School Termly Bill. Examples of trips that will go on the School Bill include lower cost trips (e.g. less than £50 cost) and the following which are part of normal school activity that are deemed 'whole year' or compulsory trips:

- Rugby School:
    - House Trips (all years)
    - Activity Weekend (F Block)

  - Bronze DofE (F Block)
  - GCSE Geography Field Trip (D Block)
  - Induction trips for IB or A-level courses (LXX)
  - A-level Biology and Geography Field Trips (LXX)
  - IB Biology, Environments Systems & Societies, and Geography Field Trips (LXX)
- Bilton Grange:
  - Residential Trip (3rd Form)
  - French Trip (Upper School)
  - Leavers' Trip (6th Form)

This list is not exhaustive but new trips to be paid via bills must be agreed in advance with the Finance Department and, where possible, billing and payment should be completed the term before the trip takes place.

Where not via the School Bill, typically payments will be requested well in advance, often split into one or two deposits and then a final balancing payment. The size and timing of payments should take into consideration the tour operator's payment schedule. Deposits are usually non-refundable, unless another student can be found to replace the student no longer going.

Organisers may get requests from students who benefit from substantial bursaries. Some support can be provided by the Bursary or, for those at Rugby, from a fund managed by the Deputy Head of Rugby School. Any requests for support from the School for such trips are first handled by the Bursary team – please email funding@rugbyschool.net and the request will be forwarded to the appropriate party for due consideration.

c) Spending on Trips & Record Keeping

Wherever possible, invoices are paid in advance as part of the trip cost from the tour operator (e.g. travel, hotels. activities and excursions). There will however be extra expenditure during the trip (e.g. snacks, drinks) that needs to be budgeted for. Staff on trips may ask for GBP currency in petty cash from the Bursary, which must be requested at least seven days in advance to be sure of timely arrival. This might be, say, £500 to cover emergencies or unexpected payments. Additional cash can be drawn down using a School credit card while travelling.

The Finance Team can also arrange a credit card or, in some circumstances, a prepayment card for the staff running the trip. Credit cards should be sought from the Finance Team at least a month in advance of the trip departure date. Staff members who use their own credit cards for expenses may also seek reimbursement in the usual manner. Expenditure must comply with the 'Purchasing Policy', 'Staff Expenses Guidance Notes' and the 'Credit Card Policy' as appropriate.

During the trip, the Visit Leader, or another member of staff assigned this task, should keep a detailed record of expenditure along with receipts for payments by petty cash and/or credit card. After the trip, the Visit Leader should submit a record of expenditure and receipts to the Bursary, who will arrange for any surplus funds to be returned to parents after all costs have been settled.

External Provider, Accreditation

When planning an outdoor education trip, the Visit Leader should scrutinise the suitability of external providers (e.g. field centre, adventurous activity centre) and check that facilities and provision meet the group's needs and expectations. Wherever reasonably practicable, it is good practice to carry out a preliminary visit. In particular, the Visit Leader should check and obtain evidence (e.g. a copy of the

badge / certificate) that the activity provider meets acceptable standards and has suitable accreditation, confirming that quality and safety have been externally assessed and accredited.

This may include possession of a:

- *Learning Outside the Classroom (LOtC) Quality Badge*;
- *AALA (Adventure Activity Licensing Authority) License* for adventurous activities such as caving, climbing (except climbing walls/abseiling towers), trekking, water sports;
- *Adventuremark badge* (Adventure Activity Industry Advisory Committee);
- *National Governing Body (NGB) Centre Approval*.

The Learning Outside the Classroom (LotC) Quality Badge accreditation provides assurance that the provider's safety and quality of provision have been assessed and verified to meet national standards by independent inspection. Where the provider holds a LotC Quality Badge, no further assurances are normally necessary. The LoTC badge also means that the provider holds an AALA Licence if it is legally required to do so.

If a provider does not hold an accreditation, the Visit Leader should liaise with the EVC and carry out further checks by questioning and information gathering. Areas to consider include insurance, compliance with legal requirements (e.g. Health & Safety regulations), staff competence, suitability of staff to work with young people (DBS checks), safeguarding arrangements, risk assessments and control measures, equipment, use of vehicles, first-aid provision, emergency procedures accommodation provision, any sub-contracting arrangements they have, and that they have a licence, where required.

Use of an external provider does not remove the obligations on School staff (e.g. Visit Leader) to ensure that all School policies are followed. Where a deviation from policy is required, this should be approved by the Deputy Head in advance of the trip.

Overseas Trips and Visits, Passports, Visas, Insurance

It is good practice to have a member of staff who can communicate effectively using the relevant language and who has a good understanding of the local culture. An assistant Visit Leader should be appointed to assist with leading overseas trips and to gain experience before leading future trips.

When determining staffing ratios, additional risks of being overseas should be considered. Staff may need to undertake training prior to the trip. Parents must be provided with detailed information (including supervision arrangements) so they can make informed decisions when consenting. It is important that parents are aware of the need to disclose information about their child's wellbeing or health that could affect them during the trip.

It is good practice to provide students with emergency information (in the local language) containing:

- Name and contact details (phone, email) of the Visit Leader;
- Name and contact details of accommodation;
- Name and contact details of the tour operator / host school etc.

Most countries have an immigration requirement for a passport to remain valid for 6 months beyond the date of entry to or return from the country. Also, a visa may be required to enter some countries. The Visit Leader should check visa requirements with the tour operator, or contact the Embassy, Consulate or High Commission of the country to be visited. The visa requirement of non-British students may vary, and this should be checked. It is the responsibility of parents to organise the appropriate visa and to have a valid passport. The Foreign & Commonwealth Office (FCO) website

provides up-to-date information (e.g. regarding entry requirements, health, safety, local laws, customs, terrorism, travel advice) about all countries and should be consulted during the planning stages and prior to departure on all trips abroad.

When visiting a European Economic Area country or Switzerland, UK residents are entitled to free or reduced cost medical treatment. To obtain this state healthcare treatment, trip participants require a valid Global Health Insurance card (GHIC).

Travel and medical insurance are provided by the School and may also be provided by the tour operator. The Visit Leader should check that all aspects of the trip are covered by the insurance policy, and ensure that activities which are excluded within the policy cover, are not undertaken.

The Visit Leader should establish if vaccinations are required by consulting the School's medical team and the FCO website information. Vaccinations should be listed in the initial letter to parents, and these may be stipulated as a compulsory requirement to participate in the trip, depending on the assessment of risk associated with diseases in the country being visited. For such trips, the medical team at School will write to parents to advise them regarding the vaccines required. Where possible, the School's medical team will also arrange for vaccinations to be administered at school for students who are registered with the School's Medical Practice (The Revel Surgery, Brinklow). The Risk Assessment should refer to specific health hazards (e.g. prevalent diseases, altitude sickness) of the trip location and activities being undertaken (e.g. risk of Lyme disease from tick bites during trekking).

The Visit Leader may wish to use a *Student Behaviour Agreement* (see OEAP National Guidance), to be signed by students and parents prior to the trip. The Code of Conduct may include:

- General expectations regarding behaviour (e.g. adherence to the '*Guidelines to Life at Rugby School*' [School Rules]);
- Specific requirements relating to travel, accommodation, permitted activities;
- Sanctions including removal from activities and repatriation at the expense of parents in the case of a serious breach of discipline (after consultation with the Deputy Head).

Tour Operator & Self-organised Tours

a) Using Tour Operators

School tour operators offer co-ordinated programmes combining travel, accommodation and activities to match the trip's aims and learning outcomes. Whilst using such an operator removes much of the organisational work, the Visit Leader must liaise closely with the operator so that the itinerary is tailored to meet the requirements and desired outcomes of the trip. There must be a clear understanding of who is responsible for particular aspects of the tour. The operator is responsible for delivering the contracted package or making suitable alternative arrangements in the event of incidents e.g. travel disruption. Overseas residential trips should be organised using a tour operator, unless in exceptional circumstances, agreed by the Deputy Head and EVC.

Use of a tour operator does not remove the obligations on School staff (e.g. Visit Leader) to ensure that all School policies are followed. Where a deviation from policy is required, this should be approved by the Deputy Head in advance of the trip.

b) Quality Standards of Tour Operators

The travel industry is covered by legal requirements that provide consumer protection. There is a requirement for financial security so the operator should be a registered members of *ABTA* (Association of British Travel Agents) or *AITO* (Association of Independent Tour Operators). If the

package includes air travel, the provider must hold an Air Tour Operator's License (*ATOL*). It is the responsibility of the Visit Leader to check that the tour operator has suitable accreditation.

c) Self-organised Visits

Self-organised residential trips and visits are the 'norm' within the UK. However, in most cases, an accredited tour operator should be used for overseas residential trips. For example, an exception to this might involve an overseas homestay language trip, where the Visit Leader organises transport directly with airline and coach companies and the students stay with families from the School that they are visiting.

By organising several aspects of overseas trips, the School could become subject to *Package Travel Regulations* (PTR) as the 'organiser'. This may occur if 'otherwise than occasionally' the School organises its own tours, in particularly organising two or more of transport, accommodation and tourist services. Organisers subject to PTR must provide accurate information, financial protection and are contractually liable. Rugby School has insurance for Tour Operator Liability.

Medical needs, Dietary requirements

Medical details and dietary information (e.g. regarding allergies) for students should be reviewed during the trip planning process. This information should be up-to-date and can be obtained via iSAMS, the School's database system, or via a form completed by parents.

Addressing the medical and dietary needs of students should constitute part of the risk assessment process, along with staffing and supervision arrangements.

The School should make reasonable and practicable adjustments to allow students with specific needs to participate. This said, for some trips (e.g. extended period, physically demanding, challenging itinerary or terrain), the School reserves the right to seek advice from the medical team at School regarding suitability before accepting a student on a specific trip.

a) Medical Needs & Medication

Visit Leaders should liaise with parents and the medical team at school, as required, to ensure that the students can be looked after properly on school trips and visits. It is important that the Visit Leader is made aware of all medication that a student requires on a trip or visit, and that the students bring this medication. The medical team at school, with at least a week's notice, can arrange for a 'doctor's letter', confirming that a student needs to carry specific medication and equipment e.g. adrenaline auto-injectors for anaphylaxis.

Medication may be looked after and administered by a member of staff, or by the student, if the student is deemed competent to do so by staff. As per the *Medical Care Policy*, staff must complete training in the administration of medication prior to doing so. The medical team at school can provide additional training and support regarding the management of specific conditions such as diabetes, epilepsy, and severe allergies/anaphylaxis.

For students who have been prescribed 'controlled medication', there is a stringent procedure for the storage and administering of this medication, which will be managed by school staff.

Staff should be asked if they wish to provide information regarding medical matters and specific dietary requirements to check that they can be looked after and that their needs can be met on the trip.

Students must bring 'emergency medication' (e.g. inhalers for asthma, adrenaline auto-injectors for severe allergies / anaphylaxis) on trips, and indeed, they cannot participate without them. Good

practice involves reminding the students and parents in advance and trip staff checking with the student before departure.

At least one member of staff should have a valid first-aid qualification on residential trips. Staff should carry first aid kits, and trip staff can administer 'over-the-counter' medication (e.g. paracetamol) if required, unless permission has been withdrawn by parents. With suitable notice (e.g. 2 weeks), the medical team at school can provide a well-stocked first aid and medication (over the counter) kit for residential trips.

All medication administered by staff during a trip should be recorded and this information should be passed on to the medical team at school very soon after the trip or visit. The Visit Leader may need to liaise with other school staff (e.g. matrons) or parents on return from a trip regarding medical matters, for example, to hand over medication or to report medication administered during the trip.

It is good practice to have a member of staff who can speak the local language on overseas trips, or have key phrases regarding illness, medication and allergies translated into the local language. It is worth noting that the awareness of the severity and management of allergies and some other medical conditions may vary greatly in different countries. It is also worth noting that anaphylactic reactions can occur due to exposure to a wide range of different allergens including some specific food types, insect bites, certain medications, pollen, latex.

b) Dietary needs

Visit leaders should liaise with parents, as required, to ensure that the students can be looked after properly on school trips and visits, regarding being able to meet their specific dietary needs. Students may have specific dietary needs for a range of reasons such as religious beliefs or medical issues (e.g. severe allergy to a food type that could result in an anaphylactic reaction). It is important that the Visit Leader liaises with significant providers in advance (e.g. hotels, caterers) to check that the specific needs can be catered for.

It is acknowledged that given the nature of a school trip of visit, that it is not possible to guarantee that an affected participant will not be exposed to an identified allergen (e.g. in congested areas, on an airplane).

The Visit Leader should inform the group not to bring or purchase identified allergens (e.g. nuts), and this should be monitored by staff. It is also important that staff check that a student with a severe allergy always carries their adrenaline auto-injectors at all times. It is good practice for accompanying staff to carry a spare.

The Visit leader is responsible for assessing the risk and employing reasonable and practicable safety measures to reduce the risk to an acceptable level. Strategies should include:

- Checking that the affected person has their emergency medication at all times;
- Communicating clearly with the group regarding the risks and their management;
- Liaising with relevant providers e.g. accommodation providers, caterers, restaurants, venues.

As the affected person lives with the allergy, they should also take some responsibility for keeping themselves safe during the trip. Dependent on age, expectations for the student may include:

- Remembering to bring emergency medication (e.g. EpiPens) with them at all times;
- Being proactive e.g. asking at a mealtime if they are unsure about the ingredients;
- Checking the ingredients on food purchased.

Inclusion

The School is proud to celebrate diversity and to champion equity and inclusion. Furthermore, the School is dedicated to eradicating discrimination against any person or group and ensuring that every member of the community feels respected, valued and supported. With this in mind, we should make every effort to ensure that educational trips and visits are available and accessible to all, irrespective of educational or medical needs, ethnicity, gender or religion.

If a visit needs to cater for students with specific needs, the School should take reasonably practicable steps to enable the students to participate in the trip or visit, and activities. When planning and managing a visit, the Visit Leader should take into consideration any activities or situations which might need to be appropriately managed to ensure that all students are equally able to be kept safe, feel supported and flourish whilst on the trip or visit. Consideration of this area will inform the risk management process undertaken by the Visit Leader and assisting staff.

Some countries may have very different viewpoints and laws regarding gender and disability, which Visit Leaders need to be aware of, and communicate clearly with students and parents.

Homestay & Exchange visits

Students are not directly supervised by school staff when they are with host families. Careful planning must ensure that responsibilities and supervision arrangements are clearly defined. The trip letters sent to parents should explain these arrangements, and parents should be able to give informed consent, based on a clear understanding of how the trip will be organised and the homestay arrangements. It is good practice to provide parents with the contact details of the host family.

The host establishment (e.g. a school) should help to assess the suitability of families to host and where possible, students should be hosted in pairs. OEAP National Guidance provide useful forms in a range of languages, which can be used to collate information and help to vet the suitability of billeting arrangements. The host establishment should provide a member of staff to act as a liaison and to help address any concerns.

It is essential that the student briefing prior to the homestay should address acceptable conduct, health & safety matters, permitted activities and staff contact arrangements. Students need to know what to do if a problem arises. The students also need to be made aware of any customs and cultural or legal differences of the host country. School staff should frequently check with students that homestay arrangements are satisfactory. If they are not, alternative arrangements must be made.

Students need to be able to easily contact school staff. It is good practice for students to save the Visit Leader's emergency contact number in their mobile phones. Social media applications (e.g. *WhatsApp*) can be used to communicate during the trip for trip management and communication purposes only. Such a *social media* group should always include more than one member of staff and more than one student; also, the group should be deleted after the trip.

Emergency Procedures & Critical Incident Management

The Chair of the Board of Governors and Head Master are legally responsible for ensuring the health, safety and welfare of all students, staff and others on the School site or engaged in off-site work-related activity. In order to comply with this important responsibility, effective policies and plans are in place to enable the rapid and effective management of critical incidents.

A 'critical incident' is any incident or situation involving trauma, fatality or serious injury to an individual or group, or serious damage to property or school assets, or any major incident declared in the vicinity (e.g. natural disaster, terrorist alert). Any other incident can usually be dealt with through normal school management procedures, without recourse to involve the Critical Incident Management procedures (see below).

For all trips taking place during School holidays, a Critical Incident Co-ordinator (CI co-ordinator) is named and details for contacting the CI co-ordinator will be given to the Visit Leader prior to departure. Following an alert from the trip staff that there has been a Critical Incident, the CI co-ordinator is responsible for establishing a Critical Incident team using the School's *Rapid Reach* alert system. The Critical Incident team will gather at Rugby School or Bilton Grange to manage the incident and to support the Visit Leader.

An emergency is a less serious incident or situation such as a more minor injury, or a student who has become temporarily separated from the main group. If a Visit Leader is unsure if the incident constitutes a critical incident, the Visit Leader should seek advice from senior staff at school e.g. Critical Incident Co-ordinator, Deputy Head, EVC.

a) Emergency Procedure

There is a generic Emergency Procedure plan available to Visit Leaders and assisting staff, which can be adapted to match the specific trip or visit. The emergency procedures involved should be communicated with students so that they know what to do if an emergency arises e.g. a 'lost' student on the London Underground, an injury on a DofE expedition during remote supervision. It is vital that during an emergency that the Visit Leader remains calms, assesses the situation, then seeks appropriate help. Accounting for all participants and their condition, whilst also safeguarding the group against further harm or worsening the emergency are important early steps. The Visit Leader should delegate responsibilities to assisting staff to help with looking after the participants and managing the situation.

b) Critical Incident Management

Should the incident or situation constitute a 'Critical Incident' (see definition above), the 'Critical Incident Management Plan' should be followed. The plan has been developed so that in any critical incident the appropriate actions can be taken to respond swiftly and safely.

For trips during school holidays, Visit Leaders are provided with information regarding critical incident management, including 'red phone' contact numbers (used to trigger a formal response to a critical incident within the School). The 'red phone' will be held by the CI co-ordinator (a nominated senior member of staff who is available to take on this role for a defined period).

The Visit Leader must provide important trip information (e.g. list of staff and students, contact information, itinerary details) to the EVC prior to departure on the trip. The EVC should ensure that hard copies of this information are stored in physical 'Disaster Boxes' for easy access by the Critical Incident team in the event of a critical incident. 'Disaster boxes' are located in:

- School House admin. office / Estates Meeting Room (Rugby School);
- Bursary / outside the Head's study, under staff pigeonholes (Bilton Grange).

In addition, an electronic copy of important trip information is uploaded by the EVC on to the Critical Incident Management Team on Microsoft Teams.

Reporting accidents

Whenever an accident or significant incident has occurred, the Visit Leader must inform the Health & Safety Officer, who will report it to the Health & Safety Executive following RIDDOR (Reporting of Injuries, Diseases, and Dangerous Occurrence Regulations). Following an accident, a form must be completed as soon as possible. For more serious incidents or accidents, a full report should be written.

Consideration must be given to whether the incident or accident might, in the future, give rise to an insurance claim for damages. Where this is considered to be a possibility, or where the incident was reported under RIDDOR, information should be retained including:

- Full details of the incident including any reports, corroborating statements, and follow-up action;
- Detailed trip itinerary, and Risk Assessments;
- List of students and staff participating;
- Information sent to parents and students;
- Consent and medical forms for anyone involved.

Personal Data & GDPR

Information and records containing personal data must be processed in compliance with the General Data Protection Regulations (GDPR). In particular, information must be:

- stored securely;
- shared with key stakeholders for justifiable reasons;
- not be kept for longer than necessary.

Visit Leaders must follow the School's guidance about the processing and retention of personal data. When personal data are taken on a trip, they should be kept secure, irrespective of how the data is carried or shared.

If personal data is to be retained, the reason must be clear (e.g. following an accident during a trip or visit), and the retention period must be kept to a minimum. Such records should be retained until a young person involved is 25 years old or 7 years after the accident or incident for adults.

Information may be stored electronically, provided it is secure. All personal data must be removed from devices (e.g. mobile phones), when no longer required. The School can provide mobile phones to be used by staff during school trips. If a mobile is lost, it can be locked remotely, and data wiped from it.

Any data breach must be reported to the Operations Manager.

Policy Owner:	Educational Visits Coordinator
Policy Approved By:	Risk, Compliance & Safeguarding Committee
Date of Policy Approval:	October 2024
Date of Policy Review:	April 2025

APPENDIX

Duke of Edinburgh's Award (DofE)

The Duke of Edinburgh's Award aims to give young people the chance to develop skills for work and life, fulfil their potential, and have a brighter future.

a) Safety Management of DofE expeditions

The national DofE organisation has no direct involvement in the delivery of DofE programmes in school, including expeditions. The DofE has issued an Operator's License to Rugby School as a 'Directly Licensed Centre' to deliver its programmes, but the DofE plays no role in ensuring the health and safety of participants on expeditions.

The DofE Manager is in charge of the Award programmes at school and liaises with the DofE. The DofE Manager is responsible for ensuring that the programmes are operated in accordance with the School's Educational Visits Policy and procedures, Expedition Handbook, and DofE requirements.

Alongside the DofE Manager, Expedition Supervisors are responsible for the safety of each Award expedition (e.g. Bronze Award). They should have proven leadership competence for the environment in which the expedition takes place. It is their responsibility to ensure the health and safety of groups and school staff, and to manage emergency situations that may arise. The Expedition Supervisor must have the competence to make critical judgements about the ability of the expedition groups to operate on their own. The competence of Expedition Supervisors/Assessors is assessed by the DofE Manager in conjunction with the EVC. The role of the Supervisor/Assessor is to ensure the safety of participants whilst on an expedition and maintain the standards of the DofE.

b) Supervision during DofE Expeditions

To complete their Award, DofE participants are expected to complete an unaccompanied expedition, where the group operates independently. For this to happen, participants must first acquire the necessary skills and knowledge, with the appropriate level of experience, confidence, physical ability and judgement. The DofE Manager is responsible for delivering a training programme (e.g. first aid, health & safety, navigation, accommodation, equipment, food) suitable for each level of the DofE expedition (Bronze, Silver, Gold) and in line with DofE expedition training framework. Each group should be able to contact first aid support, have first aid materials and be competent to look after themselves until help arrives.

Expedition Supervisors must exercise careful judgement before withdrawing direct supervision. During practical training 'in the field', each group should be led or supervised by a suitably competent leader. During the final assessment, it may be appropriate for one Expedition Supervisor, using a team of assistants, to oversee several groups. The Expedition Supervisor continues to be responsible, even during remote supervision.

Since Expedition Supervisors will not always be with groups, they should determine the nature and extent of supervision required to ensure that supervision remains effective.

Decisions must take into account the:

- Experience and competence of the group (including any specific needs);
- Experience and competence of any assistant supervisors;
- Effectiveness of communications in an emergency;
- Weather (both current and forecast);
- Environment (terrain, remoteness, hazards) and location of the expedition.