

Introduction

The advice, guidelines and suggested procedures outlined in this pack are no substitute for referring to, and complying with existing legislation in regard to school trips, visits and exchanges. The Local Education Authority (LEA) provides specific documentation for all school trips, visits and exchanges. There is no alternative but to read and heed the official guidelines. In an increasingly litigious society, failure to comply with LEA guidelines is tantamount to negligence.

This opening assertion implies that additional reading, such as this very document, is superfluous and redundant. In an age of bureaucracy and time-consuming demands on teachers' time and energy, what possible benefit can there be in further reading when all imaginable outcomes are effectively covered in existing documentation?

The aim of this pack is to:

- support existing documentation by ensuring that essential procedures are not overlooked or misread
- provide a mechanism whereby compliance with LEA guidelines is assured
- explain procedures with clarity, uncluttered by legal jargon and with an emphasis on 'probable' outcomes rather than the many 'possible' ones
- add anecdotal evidence, based on experience, to the body of advice given.

LEA guidelines, whilst not mandatory, have been written to satisfy the requirements of the law and, however necessary, they do not make easy reading. It is hoped that this pack will be comparable to having someone explain how to set the video-recorder whilst reading the manufacturer's instructions. It will highlight a safe route through the legislation and guidelines, provide strategies for the effective accomplishment of each required step and will ensure that the experience of others, including the benefit of hindsight, is yours in advance of your excursion.

A successful school trip, visit or exchange can greatly enhance the curriculum provision and will serve to motivate students and staff. On the other hand, when things go wrong it can be demoralising, stressful, disastrous or potentially tragic. By following the instructions and guidelines set out in *Organising School Trips*, it is hoped that the majority of problems and pitfalls can be avoided and that all participants will return safely, enriched by the experience.

It must be pointed out that teaching unions do not, at present, recommend participation in off-site trips and visits. They advise extreme caution and there is deep scepticism that alterations made in the wake of recent tragedies place a

4 The role of the headteacher

Since the EVC is the appointed representative of the headteacher, much of the advice in the previous chapter applies equally well to the role and function of the headteacher. It is entirely possible that the headteacher will choose to assume the role of the EVC. Whatever the decision, this chapter deals with the role of the headteacher assuming that the role of the EVC has been appointed to another person. Given the responsibilities outlined in *Chapter 2: Responsibilities* (page 7), a summary of the main role and function of the headteacher is to:

- grant approval for trips and visits, referring to the LEA or governing body when necessary
- ensure that all trips and visit comply to the guidelines of the school's health and safety policy, the LEA, or the governing body
- ensure the competence of leaders and supervisors
- ensure adequate child protection
- ensure risk assessment
- provide and support emergency procedures
- provide a contingency plan
- report incidents and accidents, including liaison with the LEA's media contact when required.

Assessing the educational objectives of the visit

It is the responsibility of the headteacher to grant approval for school trips and to ensure that they comply with existing guidelines and policy. No trip or visit should be given the approval of the headteacher without every confidence that the planning and organisation satisfy the requirements of the school. In consultation with the EVC, the headteacher should provide stringent criteria upon which the merits of any trip or visit can be assessed. The following factors should influence the headteacher's decision:

- worthwhile aims and objectives that are well met by the trip or visit
- confidence in the security of the trip or visit, based on thorough risk assessment
- confidence in the group leader, based upon qualifications, leadership qualities and previous experience
- documented evidence that the trip has been planned and organised according to the school's policy and guidelines
- satisfactory returns from child protection agencies, if required.

Appropriate staffing ratios

The ratio of adult supervisors to students is laid out by the LEA or the governing body and it is the responsibility of the group leader to ensure that the recommended ratio is met or bettered. The EVC will direct group leaders as to whether all adult supervisors or persons over the age of 18 should count in the equation to determine an adequate ratio. The prescribed guidelines and the experience of the personnel will determine the final calculation. Schools often allow adult volunteers to accompany the group, provided that their active role of supervision is limited. An assigned SEN assistant may help a particular student with specific needs, for example, but could not realistically be expected to supervise additional students at the same time.

Consideration should be given to providing training opportunities for less experienced staff. The long-term benefit is to ensure a supply of experienced and trained staff for subsequent trips and visits. However, in view of the magnitude of the responsibility placed upon supervisors and group leaders, no pressure should be brought to bear should staff decline or refuse to participate. All staff should be made aware of the responsibility to which they are agreeing and should be encouraged to seek advice from their teaching union before accepting.

The following grid is typical of the recommended ratio of adult supervisors to students, although you should also refer to existing school policy and LEA documentation:

Day and overnight visits					Day visits
Pupil age	Nursery and Reception	Years 1 to 3	Years 4 to 6	Years 7 onwards	Sixth Form
Adult: Pupil ratio	1:20 with additional adult helpers, making a ratio of 1:2-3 for nursery and a ratio of 1:3-5 for reception classes	1:6-10 the higher adult to pupil ratios recommended for younger children or higher risk activities	1:10-15	1:15	1:20 Adult supervision is not always required for sixth form students

Mixed sex groups of students should normally have at least one male and one female adult. The school policy will set the required proportion of school staff to adult supervisors and should indicate what to consider when selecting non-teaching adult supervisors or helpers.

Budgeting

Before embarking on the planning and organisation of a school trip, the group should consult the school's accounts department. They will be able to advise the group leader on expected procedures and timescales for all transactions relating to the trip or visit. These may include the issue of letters asking for money, the receipt of contributions, the paying in of cheques and cash, the ordering of supplies to support the trip, ordering foreign currency or clearing invoices. The accounts department will have strict procedures scrutinised by auditors and they will not appreciate maverick group leaders disrupting their system. This consultation should cover all aspects of the financial implications of the trip – insurance, receipts, petty cash, emergency funds, accounts, etc.

The group leader may choose to assign the responsibility of managing the budget to an appropriately skilled member of the supervisory team. Teaching unions are insistent that their members should not handle money transactions and whenever possible the central office of the school should be used to receive and receipt contributions.

A full overview of income and outcome is an essential part of the planning and preparation. Managing these funds is an integral part of organising the trip or visit. It is self-evident that it is always better to have received the full income before embarking upon the expenditure for a trip. Whatever the circumstances, the school accounts department should be consulted before undertaking financial commitments based upon projected income rather than on received funds. Reservations for some venues and activities require the use of a credit card, and the group leader is advised to seek advice on how best to proceed under such circumstances. If the school policy permits the use of personal credit cards with a reimbursement procedure, be sure that there are no misunderstandings about possible personal gains such as received Air Miles or bonuses for credit card usage. All such benefits should be cleared with the headteacher so as to avoid future embarrassment if such gains are questioned.

Thoughtful preparation of the budget should ensure that funds are available as and when required. A carefully balanced budget plan will ensure that the group leader is aware of available funds and is able to provide for the prepared events and or activities. Payments by cash or by cheque should be receipted in accordance with the school charges policy. Where possible, it is good practice to have two people present at moments of financial transaction. For trips where students bring their own funds, advice and guidance should be given to them concerning how to keep their money safe. Very young students may be encouraged to hand their personal money to an assigned supervisor for safe-keeping, but this practice can present a significant logistical dilemma if it is not properly managed. If particular coinage is required for

7 Practical suggestions

The task of compiling a list of all useful tips and suggestions for ensuring a smoothly-run and wholly successful trip or visit would be never ending. This chapter presents a small but significant number of suggestions that, over several years of experience, have helped to make organised trips more enjoyable and effective. They are presented herein as suggestions which you may or may not wish to adopt or adapt. They are not part of the statutory requirements and, whilst there is no obligation to heed a single one, an organised trip that does not consider at least some of the following aspects is less likely to succeed.

Knowledge and understanding

Getting to know the participating students is an invaluable asset to any trip or visit. The group leader should ideally know the likes and dislikes of the group, so that they can better anticipate their likely reaction to proposed activities and potential dangers. Anticipating potential hazards can avoid incidents and subsequent anguish. A quiet word at an appropriate time can smooth potentially volatile situations. Insight into the interests of participating students should inform decisions about which activities will appeal and provide the most productive experience. This does not mean avoiding all activities that would seemingly not appeal, but may involve manipulating the itinerary in recognition of the likely reaction of students and their tolerance to new and different experiences. The timing of each activity is a key element in determining the success of any trip or visit. A thoughtful balance of varied activities aimed at differing learning styles will prevent disruption caused by unrest or boredom.

The relationship established between the supervisory staff and the participating students will set the tone for the trip or visit. A firm hand is required at times, but it should be based upon sound explanation of the need for such an approach. Students of all ages seem to have an inbuilt sense of justice and they are far more likely to respond positively to instructions and restrictions that are set for reasons they can understand. Discipline should enable the students to better appreciate the supervisor's role and to recognise that their behaviour is adding to the burden of responsibility already borne by the staff involved. Sanctions should be set that reinforce the set rules. Students may be assigned set tasks during a trip or visit. This approach increases their understanding of collective responsibility.