

Educational Visits and Trips Policy

(Reviewer: Ellie Calver, September 2023)

(Approved by: SMT; Sept 23)

Policy Overview

External trips play a crucial part in the wider education of our pupils. We are very grateful to staff at Hurst for organising an exceptionally large and varied number of visits in the UK and overseas during the course of each year. We regard these as an important part of the students' educational experience. We also recognise that such activities depend upon the enthusiastic commitment, energy and professional skill of members of staff. With this in mind, it is important to have some guidelines to ensure that trips and visits are safely and properly conducted, and that absence does not interfere with progress in other subjects.

All educational trips and visits must be authorised by the Head of College through the Deputy Head Co-curricular (EVC), to whom Trip Visit and Local Area Visit forms must be submitted electronically, via Evolve Trips, well in advance of the event and before any commitment to parents and students that the trip will go ahead is made.

1. General Guidance

The following guidelines must be followed when at the planning stage:

Trip Approval:

- In the first instance, discuss your trip with the appropriate Head of Section and the Deputy Head Co-Curricular having looked at the SOCS calendar at the proposed dates of your trip.
- In order to be allowed to organise and run a trip as a trip leader you must first have had trip leadership training, been on a trip that is of the same or higher risk category than the one you want to organise and will have been first aid trained to an appropriate standard in line with the First Aid Policy by the time the trip departs. If this is not the case, please speak to the Deputy Head Co-curriculum.
- If your trip is approved, you then need to place it on Evolve Trips via a Visit Form or Local Area Visit Form
- A trip budget form must be completed and sent to Finance for review and sign off before parents are contacted. The price of the trip should not be finalised, nor communicated to parents, until that finance sign off is obtained.
- Outings should not occur during any internal or external exams, and ideally not during the week before either. Additionally, trips for the Fifth Form and UVI should not be organised prior to external examinations in the Summer Term, unless agreed by both the Head of College and the Deputy Head Academic.
- Departments may take pupils on up to two outings per year for the Sixth Form and one outing per year for the Shell to Fifth Form except in exceptional circumstances with the approval of the Head of College.
- Visits, expeditions, exchanges and field trips involving more than one night away, where possible, should take place during holidays or half terms.
- Consider the cost of the trip and how this will be met. In general, the cost of mandatory trips which are part of the core curriculum should be covered by the pupil's basic fees, which means that the cost must be allowed for in your department's annual budget.

- The cost of other trips will need to be billed as a fee extra and parents should be notified in advance where the individual charge will exceed £30 per head. If you need guidance, please speak to the CFO/Bursar or the Finance Bursar.
- For an overseas trip, unless in exceptional circumstances that have been previously approved by the Head of College, all staff must travel with the students from the point of collection in the UK to the trip destination and back to the UK to the point where parents are collecting their child.
- Unless they are members of staff, parents should not be allowed to go on a school trip. If parents do decide to go independently, they must not stay in the same hotel and must agree to accept that their child is on an official school trip and therefore must abide by the school rules at all times.
- Whilst it is accepted that there will be occasions when a member of staff's child may be on the same trip as that member of staff, under no circumstances should that member of staff be either the trip leader or the assistant trip leader for that trip.
- Any trips that involve swimming or being in water without a life jacket and/or a lifeguard must be raised with parents in planning phase and they should state the competency of their child's swimming.
- All students must remain supervised at all times during a trip. However, this supervision can be direct (with the students), indirect (in the same area as the students, but not necessarily actually with them – all students will know where the staff will be based, e.g. a coffee shop in a shopping mall) or remote (contactable and within easy and quick reach of students, e.g. during D of E expeditions).
- A trip leader should carefully choose which other staff should go on a trip, taking into account the type of activities involved on the trip, qualifications required, the makeup of the group of students and the environment the trip is taking place in. Staffing must then be agreed with the EVC before it is confirmed with stakeholders. Every member of staff going on a trip must be given a designated role.
- Ensure a copy of the trip details (pupil list/staff/contact details) is left with the Heads PA, one copy with the lodge (reception) and one with the Deputy Head Co-curricular.
- After all proposed residential trips for the year have been reviewed, a full list of approved residential trips will be published in advance to parents.

2. **Contact** Details Whilst Running a Trip

- The trip leader must provide parents with a mobile number that they can contact him/her whilst on the trip. If the trip leader has previously been issued with a college mobile phone for everyday use, then this should be the number given to parents. If the trip leader does not have one of these phones, then they may use a dedicated 'trip phone' that may be collected from the Lodge (reception). Parents should then be given this number in advance of the trip.
- In addition, trip leaders should have an additional mobile phone, the number of which is only known to other staff on the trip and the Point of Contact at Hurst. It should not be given out to parents or students on the trip. This could be the trip leader's personal mobile phone number, if it is not the number that been given out to parents, another member of staff's mobile number who is on the trip, or the number of a designated 'trip phone' that has been collected from the Lodge. This will enable the trip leader to contact the College in case of emergency.
- 'Trip' mobile phones are available from the Lodge. A phone should be booked at least 2 weeks in advance of the trip.

- College issued mobile phones and SIMs 'roam like home' in the EU, so calls and texts are the same as they would be in the UK.
- If a personal or College-issued mobile phone is an official designated phone for use on the trip, it is up to that member of staff to make sure that the phone can be used in that part of the world where the trip is taking place. The COO can assist with guidance on this. Travel outside of the EU will likely require a data 'bolt-on' for the duration of the trip. If this is the case, then the COO should be informed in advance so it can be added to the account. The cost of this bolt-on should be included in the budget for the trip.
- Overseas connection to data outside of the EU would be charged at £7.50 per package. (Currently 200mb) International call charges vary and staff should be fully aware of these costs before making calls.
- Staff who incur additional charges on college handsets, having not followed the College policy, are liable for these costs which will be recovered via payroll.
- For personal phones, the cost of this 'bolt-on' should be included in the budget for the trip. The member of staff may then claim back the cost of this 'bolt-on' and any work-orientated phone calls. Any other additional phone charges incurred on personal phones are not the responsibility of the College and will not be refunded.
- During term time the Point of Contact will be the college reception between the hours of 8am to 6pm (01273 833636) and a designated member of staff as agreed with by the trip leader on the Evolve trip form. For a House Trip it should be the HOM or Assistant HOM (or member of house team). For department trips the HOD or a member of department not on the trip. The Point of Contact and Trip Leader must have each other's contact details for the duration of the trip
- For trips that take place in half-terms and vacations the point of contact will be a member of SMT who can be contactable on the following SMT number (07921 830561) or Deputy Head Co-curricular (07720163905) or Head of College (07734904150)
- In an event of an emergency, the trip leader and other staff should take in all mobile phones as firstly, every bit of battery power may be required to deal with the incident and secondly, we do not want students phoning in the middle of a critical incident.

3. The Role of the Visit Leader

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

Overview

- Identify the clear purpose and objectives of the visit.
- Carry out and provide a written record of a comprehensive risk assessment.
- Wherever possible, involve pupils in the planning of the visit, assessing and managing risk and evaluating their own learning, development, attitudes and behaviour.
- Arrange briefing meetings with parents, as appropriate, for high risk, residential and foreign visits.
- Be trained in first aid to an appropriate standard in line with the First Aid Policy.
- Liaise with the medical centre staff to ensure that any specific medical and health issues of pupils or accompanying staff are taken into consideration within the planning and that their needs are catered for.

- Complete visit documentation and obtain approval from the Head of College/Head of Section and the Deputy Head Co-curricular (EVC) for any visit off-site, no matter how short its duration.
- Plan the itinerary to account for all times on the visit including meal and 'down' times particularly on residential trips.
- Have prior knowledge of the venue – the visit leader should normally have made an exploratory pre visit, and if this is not the case, there should be reasonable security of knowledge of the venue obtained by other means (for example the use of an external provider with good venue knowledge as a guide), and the approval of the EVC should be sought.
- Inform parents and seek permission/consent, detailing the nature, purpose and related activities involved in the visit. This information should be sufficient to enable parents to provide informed consent.
- Ensure that parents are fully informed of the schedule for the collection of payments before bookings are taken.
- Ensure parents and pupils understand regarding what is expected in terms of behaviour when the pupil is on the trip behaviour, including a code of conduct for alcohol, smoking, and the repercussions if a Hurst pupil were to break this code.
- Allocate supervisory responsibility to each adult for named pupils and ensure that each adult knows which pupils they are responsible for. To ensure that each pupil knows which adult is responsible for them and that all adults understand that they are responsible to the visit leader for the supervision of the pupils assigned to them.
- Ensure that all adults involved in supervising the visit are aware of the risk assessments including 'Plan B'.
- 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.
- Inform the HoD and Lesson Cover Team in good time of any specific need for cover of classes whilst they are away and ensure that suitable work is left for these classes and that other duties and responsibilities are covered. In addition, inform HoM in case of cover for House duties and the Director of Sport/Activities & Service with regard to covering co-curricular commitments. For Junior & Senior Prep please inform Head of Section/HoD/HOY/Head of Boys & Girls Games
- Ensure that on return from a visit, participants under 18 years of age are delivered, where appropriate, into the care of a person with parental responsibility or their representative.
- Carry out a review of the trip on return, evaluating its success and recording any near-misses or proposed changes for repeat trips in the future. This should be shared with the EVC via Evolve.

4. Organising a Residential Visit or Trip

If you are planning a school journey involving at least one night away, you must take the following steps.

Step 1: Trip Approval

- For any residential and/or overseas trip, i.e., in Category C or D, that is due to take place during any vacation period (half terms or holidays), permission should be asked for at least 12 – 24 months in advance of the trip depending upon the cost and nature of the trip. Exact timescales should be agreed with the EVC and CFO. This is to allow parents enough time to budget for a potential trip their son / daughter might be going on. Except in exceptional circumstances that have been approved by both the respective Head of Section and the Deputy Head Co-curricular, any overseas residential trip taking place during a school holiday

must be put on the system and therefore available for parents to see at an absolute minimum of 11 months in advance of the departure date for the trip.

- Before contacting the Deputy Head Co-curricular, please check the following: the calendar (available on SOCS); flight/accommodation availability; the cost and capacity of the trip; you have sufficient staffing (including male and female reserve staff). Please note the following:
- Recommended ratios can be found below. Please be aware that, more hazardous activities may require a much higher staff ratio than this.
- Members of staff taking their own children cannot usually count as part of this ratio.
- There must be a least one male and one female member of staff if a mixed group of girls and boys is being taken. If there are circumstances where this is not possible, this should be approved by the Deputy Head Co-Curricular and noted in both the risk assessment and the information that is sent to parents.
- The Visit Leader must assess whether staff are sufficiently experienced/trained to lead or assist a particular activity. (A reserve trip leader of equivalent experience may also be needed at times).
- All adults accompanying a trip need to have been checked through the Disclosure and Barring Service (DBS) by the school before departure.
- There must be at least one member of staff on the trip who is first aid trained.
- Enter the trip on an Evolve Visit Form and submit for Outline Approval. Please then wait for approval from the EVC.
- Consider whether you may need to make a site visit in advance. Do you feel comfortable writing a risk assessment with your current knowledge?

The Deputy Head Co-curricular will then decide whether to approve the trip. Considerations will be:

- Educational benefit.
- Distance, and environmental impact/sustainability.
- Cost (both overall and cost per student).
- A trip budget form must be completed and sent to Finance for review and sign off before parents are contacted. The price of the trip should not be finalised, nor communicated to parents, until that finance sign off is obtained.
- Other trips taking place during that time
- Whether the trip involves students missing school.

If approved, the Deputy Head Co-curricular will ask you to:

- Complete the rest of the Visit Form on Evolve
- Complete a Risk Assessment on Evolve
- Gain Parental Consent via Evolve (including medical and passport details – copy of passport uploaded to My School Portal)
- Submit budget form to the Finance Manager and await approval. Remember this may involve cost of minibus hire (and ensure staff are eligible to drive a college bus).
- Make sure trip is entered into SOCS Calendar (you may be required to wait until the Calendar meeting is held before final approval is given).

Step 2: Publicise the trip

Check that flights and accommodation are still available and make a provisional booking. Do not agree to release any funds at this stage. If you need to pay a booking deposit, please check with the Deputy Head Co-Curricular first, as it may be necessary to factor this into the payment schedule for parents.

Write to parents giving details of the trip. Please use this checklist to ensure the following details are covered in your letter:

1. Nature of the trip
2. Destination
3. Staffing
4. Provisional itinerary (although indicate details are subject to change)
5. Departure date/time and location
6. Return date/time and location
7. Any elements of the trip which could present a particular hazard to the group, such as any form of strenuous activity, orienteering, swimming, rock climbing etc must be fully disclosed to parents in advance
8. If appropriate, the need for: EHIC/GHIC for EU countries, Visas, GP's advice re inoculations.
9. Passport requirements, e.g., passport must not be within six months of expiry
10. If appropriate, dress details
11. Meals - whether they are included, or money needed for restaurant meals
12. Flights/trains - ask parents to provide written confirmation if students are to be dropped off/collected from the venue so will not use organised transport
13. How boarders will be returned to houses if late return
14. Costs and payment schedule including deposits
15. That a risk assessment has been completed and is available on request
16. Invitation to contact trip organiser with specific questions
17. Reminder that school rules apply on trips
18. School insurance details
19. A reminder that parents should ensure they have notified the medical centre of any changes to details provided on the annual medical forms
20. Any details about an information evening to give further details of the trip (if applicable)

Obtain deposits and confirmations, and book the trip

- You may choose to run an assembly for students and/or an information evening for parents and students at this stage. Please discuss with the Deputy Head Co-curricular to assess whether it is appropriate for an information evening
- Make sure to book a large venue and ensure you have a sufficient number of handouts to allow for higher than anticipated attendance.

Risk Assessment

- This is a vital legal document and must be done carefully well in advance of the trip. It is a public document and parents can request to see it. If there were to be a serious incident on the trip, it would be a vital piece of evidence in showing that the trip was well planned, and risks were considered.
- Please read the risk assessment guide in Hurst Online under Evolve Trips. If you are unsure as to how to complete it, please speak to the Deputy Head Co-curricular.
- Submit the risk assessment form to the Deputy Head Co-curricular via Evolve for approval, at least three term-time weeks before the trip is due to depart for day trips. For residential trips, a timescale for this should be agreed in advance, depending upon the nature of the trip.
- Please note that a risk assessment is necessary for every trip unless it is a Local Area Visit where a SOP (Standard Operating Procedure) can be used, regardless of the nature of the trip.

Step 4: Final Details

- Confirm the Trip Visit Form with Deputy Head Co-curricular.
- Ensure all names of staff and pupils/location/contact details of the trip have been uploaded onto the relevant Evolve Trips.
- Ask parents/guardians to upload pupil passports to My School Portal
- Ensure a copy of the trip details (pupil list/staff/contact details) is left with the Heads PA/Junior Prep/Senior Prep PA, one copy with the lodge (reception)/Junior Prep/Senior Prep Reception and one with the Deputy Head Co-curricular. Trip leaders should consult with the Medical Centre and parents where any students on the trip have particular medical issues.
- Share list of travelling group with Deputy Head Pastoral and discuss any pupils of concern.
- During the term time the Point of Contact will be the college reception between the hours of 8am to 6pm (01273 833636) and a designated member of staff, as agreed with the trip leader on the Evolve trip visit form, to cover any out-of-hours time. The Point of Contact and Trip Leader have each other's contact details for the duration of the trip.
- For trips that take place in half-terms and vacations the point of contact will be a member of SMT who can be contactable on the following number (07921 830561) or Deputy Head Co-curricular (07720163905) or Head of College (07734904150)
- Book a Medical kit (from the Medical Centre & please book in advance).
- Book a Trip Phone for the Lodge (reception) For countries outside Europe, ensure that you are carrying a phone that will allow you to make calls on the local network. For visits to remote areas, consider requirement for satellite phones and/or distress beacons as well as solar chargers.
- Order foreign currency (if required) from Accounts at least 2 weeks prior to departure. Alternatively, an advance may be paid into your bank account if needed, if you prefer to use a personal credit card on the trip.
- Send final detail letter to parents.
- Ask reprographics to produce emergency contact cards.
- For departures during anti-social hours, ensure that arrangements are in place for picking up boarders from houses. Liaise with the campus manager/Boarding HOMs if necessary.
- Check that arrangements are in place for boarders' luggage.
- Contact Transport about booking bus/coach (if necessary).

Step 5: Just before you go

Go through and confirm the following checklist. If you are unsure of anything, please contact the Deputy Head Co-curricular:

- Insurance details including emergency assistance helpline number.
- UK Global Health Insurance Card (collected on consent form)
- List of students' contact details and medical conditions (Evolve) and a copy for each adult helper.
- You have discussed any potential medical problems with Medical Centre/parents/HOMs and you have any necessary medication.
- Pupil list of those on trip to be sent to relevant staff (HOMs/Teaching staff etc)
- Collect Trip Mobile phones.
- SMT emergency contact details. Copy with each adult helper.
- Risk Assessment. Copy for each adult helper.
- First aid kit.
- Travel tickets, passports and visas.
- A separate list of travel document numbers, and photocopies of documents wherever possible to be carried by another adult, ideally in a sealed waterproof bag.

- Emergency contact numbers for the country in which you are staying and staff contacts. Emergency contact cards to be given to all students.
- Location maps/addresses of all accommodation. Details provided to all students.
- Contact Details of Bus/Coach Driver (if applicable).
- Phone number of British Embassy/Consulate in country being visited.
- Location of hospital/medical services.
- Copy of the emergency procedures checklist (Evolve Forms and Polices in Hurst Online)
- Where practicable, ensure that third parties in receipt of student data have signed a Data Protection Compliance Agreement. Ensure that you have collected any copying/resources that you have requested from Repro.
- Copy of accident report form (Hurst Online)

Step 6: During the Visit

- Continual monitoring of hazards throughout the visit and ongoing risk assessments must be undertaken. Adapt plans and then assess risks as necessary (behaviour, weather etc.).
- Be aware of exit strategies/options in case of a terrorist threat, and follow governmental advice of *Run, Hide, Tell* should a terrorist incident occur.
- Ensure the students know a second meeting point in advance should any terrorist event occur.
- Please make sure that adults, other than those DBS checked by the school, do not have unsupervised access to students.
- Make sure students are aware of procedures re traffic, road crossings.
- Ensure that students know what action to take if they become separated from the group.
- Stop the visit or activity at any time if the risk to the health & safety of participants is unacceptable.
- For pupils below the Sixth Form, the consumption or possession of alcohol at any time and in any circumstances is forbidden. In certain controlled circumstances (for example, organised social events with members of staff), Sixth Formers may be allowed to drink beer or wine in moderation but may not possess alcohol outside of these circumstances.
- If you deem it is safe to give students limited 'free time', they must be in groups of three and they must know where a member of staff is.
- Students must be given very limited unsupervised time in the evening and staff should regularly monitor their movements and behaviour.
- Check student numbers at appropriate and regular intervals.
- Make sure bedtimes are clearly established and adhered to.
- One member of staff should be on each corridor where possible.
- Regular checks should be made of corridors and last thing at night. This should include knocking on bedroom doors and checking students are in their room.
- There should be a very clear rule about consorting in bedrooms so that students do not visit others' bedrooms after the specified time for lights out has been made clear.
- Ensure students know the emergency evacuation procedure of their accommodation and where to meet.
- Ensure hosts/hotel staff are informed of any allergies/dietary requirements.
- Students should be informed of the location and room number of staff bedrooms.
- Ensure that any losses are reported to the Police within 24 hours of discovery of the loss and that a copy of the police report is kept.
- Keep receipts for all expenses incurred in the case of accident or injury e.g., doctor's call out charge, drugs from a pharmacy, hospital bill, x-rays, extra transport.
- Please keep receipts for expenses to be presented with summary of accounts to the Finance Department within a week of your return, together with any unused foreign currency.

Step 7: After the visit

- Complete the Evaluation Form on Evolve
- All incidents including poor behaviour, accidents and near-misses must be reported in writing according to College policies, using appropriate forms within 24 hours of return.
- Check, confirm and clear any costs associated with Trip phones (if used).
- Send a report to marketing and provide selected photos of the trip.
- Shred all confidential information such as copies of passports (if collected) and contact details.

5. Organising a Non - Residential Visit or Trip

Step 1: Trip Approval

- This must be submitted to the Deputy Head Co-Curricular, via Evolve, at least one week before the calendar deadline during the school term before the trip is planned.
- Before contacting the Deputy Head Co-curricular, please check the following: the calendar on SOCS; ticket availability; the cost of the trip; make sure you have sufficient staffing.
- The recommended ratio of staff can be found below.
- Members of staff taking their own children cannot usually count as part of this ratio. You must assess whether staff are sufficiently experienced/trained to lead or assist a particular activity.

The Deputy Head Co-curricular will then decide whether to approve the trip. Considerations will be:

- Educational benefit.
- Other trips taking place during that time.
- Whether school is missed or not.

If approved, the Deputy Head Co-curricular will ask you to:

- Complete the rest of the Visit Form/Local Area Visit Form on Evolve
- Complete a Risk Assessment/SOP on Evolve
- Gain Parental Consent via Evolve, including medical details.
- Submit budget form to the Finance Manager and await approval. Remember this may involve cost of minibus hire (and ensure staff are eligible to drive a college bus) .
- Make sure trip is entered into SOCS Calendar (you may be required to wait until the Calendar meeting is held before final approval is given).

Step 2: Publicise and book the trip

- Publicise the trip to students.
- Write to parents giving details of the trip. The following details should be included:
 1. Nature of the trip
 2. Staffing
 3. Provisional itinerary (although details may change)
 4. Departure date/time and location
 5. Return date/time and location.
 6. Any elements of the trip which could present a particular hazard to the group, such as **any** form of strenuous activity, orienteering, swimming, rock climbing etc must be fully disclosed

- to parents in advance
7. Dress details
 8. Meals - whether they are included, packed lunches or money needed for restaurant meals
 9. For day trips, parents of students in all year groups may request individual travel arrangements during the daytime, provided this is practical for the trip schedule and do not cause a delay to the activity of the group. For such cases, parents must take full responsibility in writing for their children while not in the care of school staff
 10. How boarders will be returned to houses if late return
 11. Costs and whether it will be added to the bill (contact finance manager)
 12. Invitation to contact trip organiser with specific questions
 13. Reminder that school rules apply on trips
 14. School insurance details (available in Evolve in Hurst Online)
 15. That a risk assessment/SOP has been completed and is available on request
 16. A reminder that parents should ensure they have notified the medical team of any changes to details provided on the medical forms

Step 3: Risk Assessment

- This is a vital legal document and must be done carefully well in advance of the trip. It is a public document and parents can request to see it. If there were to be a serious incident on the trip, it would be a vital piece of evidence in showing that the trip was well planned, and risks were considered.
- Please read the risk assessment guide in Hurst Online under Evolve Trips. If you are unsure as to how to complete it, please speak to the Deputy Head Co-curricular.
- Submit the risk assessment form to the Deputy Head Co-curriculum via Evolve for approval, at least three term-time weeks before the trip is due to depart.
- Please note that a risk assessment is necessary for every trip unless a Local Area Visit where a SOP (Standard Operating Procedure) can be used, regardless of the nature of the trip.

Step 4: Final Details

- Ensure all names of staff and pupils/location/contact details of the trip have been uploaded onto the relevant Evolve Trips.
- Ensure a copy of the trip details (pupil list/staff/contact details) is left in the Lodge (reception) and with the designated point of contact. Trip leaders should consult with the medical centre and parents where any students on the trip have particular medical issues.
- Trip leaders should consult with the Deputy Head Pastoral to discuss any pupils of concern.
- Pupil list of those on trip to be sent to relevant staff (HOMs/Teaching staff etc)

Please make sure you take with you on the trip:

- List of students contact details and medical conditions (this can be obtained via Evolve). Copy for each adult helper.
- Make sure you have discussed any potential medical problems with Medical Centre/parents/HOMS and that you have any necessary medication with you.
- During the term time the Point of Contact will be the college reception between the hours of 8am to 6pm (01273 833636) and a designated member of staff, as agreed with the trip leader on the Evolve trip visit form, to cover any out-of-hours time. The Point of Contact and Trip Leader have each other's contact details for the duration of the trip.

- For trips that take place in half-terms and vacations the point of contact will be a member of SMT who can be contactable on the following number (07921 830561) or Deputy Head Co-curricular (07720163905) or Head of College (07734904150).
- Ensure a copy of the trip details (pupil list/staff/contact details) is left with the Heads PA/Junior Prep/Senior Prep PA, one copy with the lodge (reception)/Junior Prep/Senior Prep Reception and one with the Deputy Head Co-curricular (if during a half-term or vacation).
- Trip mobile phone(s) – from Reception.
- Contact Details of Bus/Coach Driver (if applicable).
- Risk Assessment. Copy for each adult helper.
- First aid kit (from Medical Centre & please book in advance).
- List of staff contact numbers which should be given to all staff and students.

Step 5: During / after the visit

- Continual monitoring of hazards throughout the visit and ongoing risk assessments must be undertaken. Adapt plans and then assess risks as necessary (behaviour, weather etc.).
- Be aware of exit strategies/options in case of a terrorist threat, and follow governmental advice of *Run, Hide, Tell* should a terrorist incident occur.
- Ensure the students know a second meeting point in advance should any terrorist event occur.
- Make sure students are aware of procedures re traffic, road crossings.
- Ensure students know what action to take if they become separated from the group.
- Stop the visit or activity at any time if the risk to the health & safety of participants is unacceptable.
- For pupils below the Sixth Form, the consumption or possession of alcohol at any time and in any circumstances is forbidden. In certain controlled circumstances (for example, organised social events with members of staff), Sixth Formers may be allowed to drink beer or wine in moderation but may not possess alcohol outside of these circumstances.
- Check student numbers at appropriate and regular intervals. Regular headcounts must be taken.
- If you deem it is safe to give students limited 'free time', they must be in groups of three and they must know where a member of staff is.
- Please keep receipts for any expenses to be claimed.
- Please make sure that adults, other than those DBS checked by the school, do not have unsupervised access to students.
- On your return, please wait until all students have been collected. All boarding students must be taken back to their boarding houses.
- All incidents including poor behaviour, accidents and near-misses must be reported in writing according to College policies, using appropriate forms within 24 hours of return.
- Check, confirm and clear any costs associated with Trip phones (if used).

Potentially Hazardous Activities Off-Campus

Hazardous activities include camping, skiing, walking in remote areas, mountain walking, rock climbing, caving, potholing, horse riding, RAF air experience, sailing, sail boarding, canoeing, sub-aqua, swimming in sea, rivers and lakes, field studies. (This list is not an exhaustive one, if in doubt consult the Head of College through the Deputy Head Co-curricular). Before approving such activities, the Head of College through the Deputy Head Co-curricular must be satisfied that:

- The leaders and accompanying staff are sufficiently experienced and qualified to undertake such activities.
- The appropriate student-teacher ratio required for the particular activity is observed.

- For certain locations the party leader has knowledge of the area to be visited or has undertaken a reconnaissance visit or has taken suitable professional advice.
- A full risk assessment of the activity has been conducted.

Staff organising hazardous activities must possess the basic qualifications for certain specialist activities. See the Outdoor Education Advisors Panel web site. In addition, staff must be aware of, and comply with, all current requirements for adventure activities of the nature being undertaken. This must be researched and verified in advance of trip approval being granted. Rules for licensing (Adventure Activities) must be adhered to where this is applicable (for example, in relation to the distinction between running activities solely to students currently at the school as against any activity also being offered to other schools or members of the public).

It is important to note that students who complete their leaving procedure during the course of the Summer Term are not members of the school when and if they take part in an activity later in the term or during the school holiday.

If it is intended to organise an activity at a commercial centre it is important to verify that the centre is licensed. The Adventure Activities Licensing Authority website has a list of licensed providers.

6. Use of third party providers or activity centres

From time to time a trip or activity may take place at an adventure centre or other equivalent venue. In such circumstances, the member of staff organising should consider a prior visit and should certainly have a discussion with the provider about how their facilities can be used to achieve the educational objectives of the trip or activity. Some of the following questions may be relevant to ask as part of this conversation.

- What is the safety provision on site?
- Are there risk assessments in place?
- Is there evidence of strict operating procedures?
- What are the fire evacuation procedures?
- Do all staff hold DBS checks which are up to date?
- What are the training levels of the staff you will be working with?
- What first aid and medical arrangements are in place?
- How does the site record accidents and near misses?
- What does the accident log look like for recent months?
- Request a copy of the venue's Health and Safety Policy. This document can inform your health and safety planning, such as staff to student ratios.
- Does the centre have liability insurance?
- Do they have a full understanding of their responsibilities when under 18s are on site?
- This is also an opportunity to discuss provision and adjustment for any SEND students.
- Does the venue, site or provider comply with all local and national standards for the relevant activities?
- Do they hold a LOtC Quality Badge or are they AALA licensed for example?
- Are they a recognised supplier and do they have testimonials and evidence to this effect?

7. Health Advice

The following guidelines have been put together to offer advice and support for those involved with

taking students on overseas trips or residential trips within the UK.

- The most important aspect of any trip is to plan ahead – please discuss your trip with Medical Centre staff at least 10 weeks before departure.
- Many problems encountered on trips such as sun, traveller's diarrhoea, etc. are not prevented by vaccine and will need specific advice. In certain cases, the nurses will be happy to speak directly with students to reinforce safety abroad. This is specifically important when malaria tablets are required – a group taking tablets together will mean greater compliance.
- The Medical Centre suggests that Day students not registered with the school GP go to their own GP to receive vaccines. The GP will hold the student's records and have dates of any boosters given.
- When consent forms are returned, please discuss with the Medical Centre any concerns you might have about students with medical conditions. This also includes students on medication that you are unfamiliar with. It is important that you understand how to deal with any emergencies that might arise from various conditions such as diabetes and asthma.
- All residential trips will have at least one member of staff with first aid training.

8. Managing the trip

- In general students should remain with the group at all times. If a small amount of unsupervised time is given then students should be in groups of a minimum of three people and they should know where members of staff are. They should be given clear guidance as to where they can and cannot go and reminded about behaviour, alcohol misuse etc.
- Students below the Sixth Form should, in general, have very little unsupervised time in the evening. In the Sixth Form students may be given a limited amount of time (perhaps up to 1½ hours) but they should always be met at the end of the period.
- When checking the rooms at curfew, staff should be vigilant for signs of alcohol.

9. Additional Safety Considerations

Any accommodation arranged by the School for students, be it field study centres, hotels, youth hostels or boarding accommodation in overseas schools, should be satisfactory and, as far as possible, checked before use, as part of the risk assessment procedure, and any pre-existing damage/wear and tear (if not harmful) noted in advance. Anything rendering the accommodation unsuitable for use must be rectified in advance of students taking up the accommodation.

Care should be taken to minimise access to students by 'unchecked' adults, who should never be allowed unsupervised access to the children at any time.

Satisfactory arrangements must be in place for students to contact accompanying staff at all times in case of difficulty or concern. Staff should regularly ask students during their stay whether they have any concerns about their accommodation, particularly regarding security and intrusion.

In addition to the Health and Safety risk assessments, the following checks should be undertaken to verify that:

- There are emergency evacuation procedures in place and known. There are sufficient and suitable beds and bedding for all students.
- There is separate sleeping provision for each gender.

- There is sufficient access to toilet and washing facilities, separate for each gender if possible.
- There is adequate provision for sufficient and appropriate food and drink and that in youth hostels or field centres it is stored and prepared under sufficiently hygienic conditions.
- Students have the ability to contact medical services and provision is in place for students to return to school or home in the case of accident or illness.
- There are emergency evacuation procedures in place and known.

10. Accompanying staff

Visit and Activity Leaders

The Visit Leader has the overall responsibility for supervision and conduct of the visit. To ensure accountability and to avoid potential confusion, a single Leader should be appointed. If this role changes during a visit, a clear handover should be made. The key requirements for Visit Leaders are that they must be accountable, competent and confident to lead the visit/activity, not that they hold a particular post, title or job description.

Being **accountable** means that the Leader has been engaged through an appropriate recruitment process, which includes vetting and induction into the establishment's policies and procedures. The details of this process may depend upon whether the Leader is employed, contracted or acts as a volunteer, but in all cases should be thorough. The vetting process should be managed by the college HR team and no-one will be allowed to take part in any activity until their checks are completed to the satisfaction of the HR Director. This means that any trips / activities need to be fully planned in advance to allow time for any required checks to be completed (see below).

Being **competent** means that the Leader has demonstrated the ability to operate to recognised standards of good practice and has sufficient relevant experience and knowledge regarding the group, the activity and the venue. This can be demonstrated through experience and or qualifications.

Effective Leaders are **confident** but fully aware of their own limitations.

- A Visit/Activity Leader **must** follow the employer's guidance and establishment policy and procedures.
- A Visit /Activity Leader **must** ensure that the activity is properly planned and that the plan includes appropriate risk management procedures based on a risk-benefit analysis.
- A Visit/Activity Leader **must** ensure that the roles and responsibilities of other staff (and young people) are properly defined and communicated, ensuring effective supervision.

Assistant Leaders

Those appointing Assistant Leaders should ensure that those appointed are:

- Suitably competent and knowledgeable about establishment and employer policies/procedures, insofar as they affect the responsibilities they have been assigned.
- specifically competent to carry out such tasks as they are assigned.
- fully briefed to ensure that they understand the role and responsibilities expected of them.

Volunteer Helpers

The school trip organiser must verify with the HR Director that all accompanying staff and voluntary helpers have been positively vetted in accordance with all relevant current legislation before they take part in the trip. A minimum of two months' notice must be given to the HR Director to complete this procedure. The only exception to this rule can be made on the condition that sufficient, but not all, checks are completed, and the organiser of the trip gives a signed personal undertaking never to allow the individual unsupervised access to the children at any time. This could mean making changes such as the partially checked helper sleeping at a different location over-night.

Staff Children / Family members

In general staff whose own children are going on a trip should not be counted as part of the staff ratio because of the potential conflict of interest. It should also be made clear that staff children will not be covered by the school insurance policy unless they are going as a school student. If approval is given for staff children, who are not students, and/or partner to accompany a trip, then the family members must pay the full cost of the trip and source their own insurance.

Training and competence of staff

All staff should receive training in the basic requirements for managing educational visits successfully. This will consist of:

- Training session for all new staff.
- Clear information and guidance on Evolve.
- Reminders to staff by e-mail or at staff meetings.
- Meeting with the Deputy Head Co-curricular for all staff running a residential trip for the first time.

11. Visas

Students should be advised of any visa requirements well in advance. For trips within the EU students who are not nationals of any EU member state may need a visa to travel from the UK to another member state. For assistance, speak to the Trips Administrator about your particular requirements.

12. Emergency procedures and incident reporting

In the event of an emergency, please follow the guidance in the 'Critical Incident Management' folder in Hurst Online. [Evolve Trips - 20221124 Critical Incident Guidance Visit Leaders .pdf - All Documents \(sharepoint.com\)](#)

13. Inclusion

We endorse these principles:

- a presumption of entitlement to participate.
- accessibility through direct or realistic adaptation or modification, including the provision of auxiliary aids and services.
- integration through participation with peers.

It is unlawful to:

- treat a disabled young person less favourably.
- fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification. A decision to exclude a young person should not be taken lightly, and only after consultation.

14. Homestay visits and the use of host families

Homestays and staying with 'host families' is not permitted. Pupils must complete their overnight stay/stays in suitable accommodation under the supervision of college staff.

15. Educational Visits – General Guidance

All types of activity whether academic, sporting or recreational come under the following guidelines and responsibilities. Health and Safety at Work Act 1974: sets out the legal framework in which employers and employees work. It applies to all educational visits. The College operates a comprehensive system for application of, and management of, all Educational visits. The procedure to apply for approval and the method for planning an education visit is covered in the College's Staff Handbook and application is made through the EVOLVE system. The College's Educational Visits Coordinator (EVC) has responsibility for ensuring that all members of the college staff are familiar with the good practices set out in these documents.

The EVC is responsible to the Head of College for proper management of the application, planning and recording process. The EVC is also responsible for supervising staff training and development to ensure appropriate level of management. It is also the responsibility of the HoYs, HoMs and HoDs to give authority for educational visits run through their year group, houses or department, respectively and to assist with all planning if necessary. The HoYs, HoMs, and HoDs must ensure copies of the completed risk assessments are held. Staff wishing to run educational visits should first approach their Head of School section, HoY, HoD or HoM and confirm the outline detail with them, following which, the full trips procedure must be followed, through Evolve.

16. School Trip Financial Planning and Accounting

Insurance

The College is fully insured against all usual risks. However, it is worth pointing out that cover does not extend to the personal belongings of staff or pupils unless the College can be shown to have been negligent in any way. It is ultimately the Trip Leader's responsibility to ensure adequate insurance cover is in place; Trip Leaders are strongly encouraged to read any appropriate documentation and liaise with the Finance Manager or CFO. The following is a brief summary of the main policies as they affect staff and pupils. If you have any queries, please contact the Finance Manager.

School Travel Cover

Under this policy ALL school trips, **except those involving potholing, skiing, diving or other hazardous activities** will automatically be covered without the need for declarations in advance for all normal expenses such as emergency help, realistic medical expenses abroad, baggage, loss of money, personal liability, and disability as a result of an accident. Consequently, it should only be necessary to take out additional cover where the trip does involve hazardous activities such as the above or one-off activities such as bungee jumping, or if certain students have pre-existing medical conditions and this can be arranged through the College's insurers if necessary. Thus, when arranging a school trip through a Travel Agent or tour company members of staff should always decline to accept the insurance offered by the arranger. Cover applies to all members of the School Party, including staff, voluntary helpers and parents. We do not recharge parents for the cost of this insurance cover. However, staff organising trips should make an allowance of £2 per head per day for the cost of insurance when calculating the budget for a trip. **Anyone organising a trip must therefore:**

- Allow for the cost of cover when calculating the overall cost of the trip;
- Identify whether additional cover is required (for dangerous activities or pre-existing medical conditions) and, if so, ask the Bursar's Office for a quotation;
- Give each member of the party a summary of the insurance cover being provided, copies of which are available from the Bursar's Office.

Personal Accident Scheme

This insurance provides cover for pupils, in respect of death or any permanent disability and there are no exclusions regarding sporting or hazardous pursuits. The cover is effective world-wide, but some parents may have chosen to opt out of the scheme and thus not all pupils will be covered.

Employer's Liability

This policy covers the school's legal liability for accidental bodily injury, illness or the death of members of staff and authorised voluntary helpers/supervisors. Cover is provided on a world-wide basis, in respect of educational or other visits. There is no limit to the amount of compensation that may be payable.

Public Liability Insurance

Under this policy the Insured is the College (which includes individual members of the College staff and other authorised volunteers / helpers / supervisors whilst engaged in school activities). Cover is provided only in the case of the College being sued in relation to injury sustained by any member of the public (including pupils) as a result of the negligent actions of college. This includes any activity connected with the College and educational visits or holidays sponsored and directly supervised by the College anywhere in the world.

17. Alcohol on trips – students

- For pupils below the Sixth Form, the consumption or possession of alcohol at any time and in any circumstances is forbidden.
- In certain controlled circumstances (for example, organised social events with members of staff), Sixth Formers may be allowed to drink beer or wine in moderation but may not possess alcohol outside of these circumstances.

18. Alcohol on trips - staff

To apply to any trip (residential or non-residential, domestic, or overseas)

- All staff need to be able to deal with an emergency and assume responsibility for the pupils on a trip at any time, including overnight. In addition, on duty members of staff should be in a fit state to be able to supervise pupils and, if necessary, drive a vehicle in accordance with the prevailing driving laws of the country in which they are based.
- Some countries and certain organisations also prohibit the possession and consumption of alcohol, whether by minors or adults, and all staff and pupils must comply with the prevailing law of the country in which they are based.
- At all times (including overnight) there should be at least two members of staff on duty who have not consumed any alcohol before, or during, their duty slot.

19. Post Trip Evaluation

- Ask all staff and pupils for feedback on the visit.

- Complete the mandatory post evaluation report EV on EVOLVE (Trips and Visits).
- Report any incidents/accidents to H&S manager Mark Adams.
- Submit final accounts for the visit to the Bursar/Finance Manager.

20. Risk Assessment

- Complete the Risk Assessment (RA) form on EVOLVE (Trips and Visits) following the instructions at the beginning.

21. Activity risk categories and staffing ratios

- Activities are placed into four categories to assist with hazard management and staffing ratios. Listed below are the four categories in order of risk and details appropriate to each category.

Risk Categories and Staffing Ratios

When organising a trip, you will need to assess the risk of the activity. These are placed into four categories to assist with hazard management and staffing ratios All trips must be placed on Evolve Trips:

Category A (Local Area Visit Form on Evolve with Standard Operating Procedure)

Category B (Visit Form on Evolve with Risk Assessment)

Category C (Visit Form on Evolve with Risk Assessment)

Category D ((Visit Form on Evolve with Risk Assessment)

Depending on which risk of the activity your trip falls into, it will decide on the type of forms you have to fill in.

The ratios given are the basic minimum needed, when these have been reached the multiples thereafter may be varied as appropriate, if an assessment has been made and approved by the Head of College or Deputy Head Co-curricular.

Standard Operating Procedure (SOPs) forms can be used for trips in Category A. These are pre-filled forms located on Evolve. A risk assessment may be required for a Category A trip depending on the profile of the group/specific individuals (e.g., you have someone with a serious nut allergy/medical condition).

Category A – Junior Prep/Senior Prep/Senior School

(Local Area Visit)

- Non-overnight activities that have minimal foreseeable risk and are based within close proximity to the school or where assistance is readily available
- Low risk, routine visits to venues in your local learning area
- Everyday level of risk covered by school's current policies and procedures
- Considered lessons in a different classroom
- Activities that are curriculum based and take place regularly.
- Activities, which take place largely within the school working day.

Staffing ratios:

Reception to Year 2 (including EYFS):

- Reception 1:4 or 1:5
- Year 1 and 2 1:8 or a lower ratio depending on the nature of the trip.

This ratio will be amended, depending on the venue and the nature of the visit. At least one supervising member of staff will always be qualified in Paediatric First Aid and all of our teachers and teaching assistants are qualified in first aid.

Years 3 – 8:

- Year 3 to 6 1:10/15 lower ratio depending on the nature of the trip.
- Year 7 to 8 1:16

Senior School:

- Shell and Remove 1:16
- Fifth form 1:20
- Sixth form 1:25

Examples:

- Sports fixtures at or near the College
- Visits to local sports centers as part of normal games' activity
- Regular local visits to site of interest
- House social visits for students – House trips

Approval – Junior/Senior Prep:

- Head of Junior Prep/Senior Prep/Deputy Head Co-curricular school by SOP (Standard Operating Procedure) /Local Area Visit Form, parental consent given at the start of the academic year, use of existing communication through school calendar, newsletter or an information sheet.

Approval – Senior School:

- Deputy Head of College / Deputy Head Co-curricular by SOP (Standard Operating Procedure) /Local Area Visit Form (on Evolve), parental consent given at the start of the academic year as part of typical curriculum, use of existing communication through school calendar, newsletter or an information sheet.

Category B - Junior Prep/Senior Prep/Senior School

- Activities that are day trips within the UK
- Activities that are not normally available as part of a typical curriculum
- Activities that extend outside school working day
- Activities that are of some foreseeable risk and are based away from the school but are near to appropriate assistance in an emergency

Staffing ratios:

- | | |
|---|------|
| <input type="checkbox"/> Year 3 | 1:6 |
| <input type="checkbox"/> Year 4 to 6 | 1:10 |
| <input type="checkbox"/> Year 7 to 8 | 1:15 |
| <input type="checkbox"/> Shell and Remove | 1:16 |
| <input type="checkbox"/> Fifth form | 1:16 |
| <input type="checkbox"/> Sixth form | 1:20 |

Where NGB qualifications are required then NGB guidelines to ratios apply.

For Duke of Edinburgh Expeditions, the "Award Leaders Handbook" applies.

Where sporting or recreational risk applies to the leader a second member of staff should attend.

Examples:

- Visits to local sports centers not part of usual calendar
- One-day field trips (Geography/Biology etc)
- CCF Day Trips
- Outdoor activities, sporting fixtures not part of usual calendar

Approval:

- Head of Section, followed by Deputy Head Co-curricular by Evolve Visit Form
- Parental consent gained by online consent form consenting into activity, use of existing communication through school calendar, newsletter or an information sheet.

Category C - Junior Prep/Senior Prep/Senior School

- Activities that involve overnight stays in the UK or overseas (non-remote, e.g., Western Europe) whether curriculum based or recreational with or without the use of a provider.
- Activities that have a potential hazard
- Activities based away from the school or near hazards i.e., water.

Staffing ratios:

1. Year 3	2:12
2. Year 4 to 6	2:16
3. Year 7 to 8	2:20
4. Shell and Remove	2:20
5. Fifth form	2:25
6. Sixth form	2:30

Where NGB qualifications are required then NGB guidelines to ratios apply.
For Duke of Edinburgh's Expeditions the "Award Leaders Handbook" applies.

Examples:

- Outdoor activity expeditions,
- D of E silver expeditions
- Overnight field trips and sports tours/festivals within the UK
- Foreign exchange trips
- Educational overseas trips (non-remote)
- Iceland Geography Trip using local tour operator

Approval:

1. Head of Section, followed by Deputy Head Co-curricular by Evolve Visit Form, and signed off by Head of College/Deputy Head of College
2. Online parental consent form (including passport details), letter to parents containing full schedule of details including all activities to be undertaken.

Category D – Junior Prep/Senior Prep/Senior School

- Activities that involve travel to remote countries
- Activities that have a high risk or are undertaken in extreme conditions.
- Activities with a high degree of unsupervised content

Staffing ratios:

- Year 5 to 6 2:10 - One adult to be first aid trained
- Year 7 to 8 2:12 - One adult to be first aid trained
- Shell & Remove 2:12 - One adult to be first aid trained
- Fifth form 2:16 - One adult to be first aid trained
- Sixth form 2:20 - One adult to be first aid trained

Where NGB qualifications are required then NGB guidelines to ratios apply.
For Duke of Edinburgh's expeditions, the "Award Leaders Handbook" applies.

Examples:

- Outdoor activity expeditions to the Alps etc.
- D of E gold expeditions abroad, ski or winter mountaineering
- White water rafting and kayaking
- Major sports tours abroad with high-risk activity

Approval:

- Head of Section, followed by Deputy Head Co-curricular by Evolve Visit Form, and signed off by Head of College/Deputy Head of College
- Online parental consent form (including passport details), letter to parents containing full schedule of details including all activities to be undertaken.

Notes

The ratios given are the basic minimum needed, when these have been reached the multiples thereafter may be varied as appropriate, if an assessment has been made and approved by the Head of College and Deputy Head Co-curricular

Standard Operating Procedure (SOPs) forms can be used for trips in Category A. These are pre-filled forms located on Evolve. A risk assessment may be required for a Category A trip depending on the profile of the group/specific individuals (e.g., you have someone with a serious nut allergy/medical condition).

Documents Associated with Educational Visits and Trips

The Trip Visit forms, Local Area Visit Forms, Risk Assessments and Standard Operating Procedure Forms and other useful documents, including insurance details, etc. can be found in Evolve in Hurst Online. Any member of staff organizing a trip should look in the EVOLVE site in Hurst Online [Evolve Trips - Evolve Trips Home \(sharepoint.com\)](#). If there are any issues with accessing details, they should contact the Deputy Head Co-curricular. Any relevant documents should be photocopied and taken on the trip.

Using EVOLVE Trip Manager

Overview

The Trip Lifecycle

A typical trip will consist of the following phases

1. Create the trip and gain outline approval.
2. Once approval is given, fill out the detail of trip and communicate with parents.
3. Submit completed trip form details for final approval.
4. Manage the run up to departure – consent forms, payments etc
5. On the day
6. Post trip evaluations

The trip Form



Creating the Form.

In this stage, just the barest of detail is provided. The date, where the trip is and why is it being undertaken.

1. Logon to EVOLVE
2. Click on the **ADD** tab on the EVOLVE dashboard.
3. Give the trip a name. Try and make it unique (A trip to the Zoo is not a good choice!).
4. Click on **Continue**.
5. Fill in the screens that are shown. Clicking **Continue** will move you on to the next.
6. When all the items on LHS have ticks click on **Submit for Outline Approval** and select an appropriate approver.
7. Until approval has been given you cannot add to the form. You will be notified by email that approval has been given.
8. Once approval is given you can edit the form and continue to fill it out.

Completion of the Form

In this stage you provide the operational details of the trip.

1. Logon to EVOLVE
2. On the EVOLVE dashboard click on the **Track** tab.
3. At this stage your trip will be found in the **Draft** queue.
4. Click on the edit button  to begin the process.
5. All the items, except  **event specific plan**, need to be completed.
6. When complete click on **Submit Form**. Note that if anything is missing, the system will warn you and not allow the form to be submitted.


Managing the trip

This part of the process concerns itself with management of the attendees list, consent forms and payment schedules and any other communications. All these functions are carried out using the EVOLVE **Event Manager**. The **Event Manager** can be accessed anytime using the button.

Attendees.



In this section is where the pupils and staff going on the trip are maintained.

1. In the **Event Manager** navigate to the **Names** section. 
2. To add pupils (Participants) click on the button.
3. Using the filters on the left-hand panel of the screen, build your list.
4. Select the pupils by clicking the Select box in the middle panel. This moves the selected pupil over to the right-hand side panel.
5. To de-select a pupil untick the pupil's name in the right-hand panel.
6. Click on the **Continue** button to save the names.

Consent Form.

Each trip can have its own bespoke consent form, but there are two ready made templates that can be used as the basis for one. One is for a trip inside the UK and the other is for a overseas trip. Make sure you use the correct template.


1. In the **Event Manager** navigate to the **Consent** section.
2. Click on the green **Create Consent Form** button.
3. Click on the **Import** button.
4. Select the correct template from the selection dropdown.
 - Use the **Hurst Consent Form – Overseas** for an overseas trip.
 - For **UK trips** use the **Hurst Consent Form – UK**.
5. Click on the **Copy From** button.
6. Return to the **Consent** dashboard by pressing the two blue left-hand pointing chevrons at the top of the screen.
7. To send emails to parents click in the box marked all.
8. Select **Send by Email & myEVOLVE**
9. If required, set a date that consent must be given.
10. Click the **Continue** button.
11. Use this dashboard to manage the consent process. As consent forms are completed the graph at the top of the page changes. Also, the select boxes against a pupil become greyed out. This means that it's easy to send chase emails.

Payments.

If parents must pay towards the trip, each pupil needs an account against which payments are recorded.

1. In **Event Manager** dashboard navigate to the **Payments** section. If you can't see the **Payments** section raise a Parago ticket in the MIS Apps queue requesting permission.
2. If there is a schedule of payment, then this must be done first. Otherwise skip ahead to point 8.
3. Click on the pink **Payment Points** button.
4. Fill in the data needed in the **Add Payment Point to Payment Item**.
5. Click the **Add** button.
6. Continue to add the required payment points. Note that the Valid from date should be the same for all the payment points. This allows parents to pay for the whole trip in one go if they so wish.
7. Return to the **Payments** dashboard using the two blue chevrons.
8. Whenever there are pupils who haven't got an account set up for the trip, there will be a big red banner stating that there are participants that do not have accounts for this event. In the next few steps, we will create these.
9. In the **Auto-Fill** box fill in the required data. The total amount of the trip and the due date.
10. Click on the pink **Auto-Fill** button. This will fill the boxes against each pupil with the data. If you need to, this is the time you make individual changes to a pupils account. Once the next step is carried out, the account is fixed.
11. Scroll down to the bottom of the pupil list and press the **Create** button.
12. Press the green **Send Payment Emails** button. This allows you to select which pupils' parents, usually all, to send the payment notification email to.
13. Fill in the any additional information if required. As we use myEvolve, it's not necessary to set an expiry date.
14. Press Send.
15. The **Payment** dashboard is used to monitor the fiscal situation. If chasing emails are required, then repeat from step 12.

ENDPIECE

This is not meant to be a detailed user guide. There is a very good online guide. Press the orange help button at the  top of the screen to access it.

During the run up to the trip, the pupils participating may change. Remember that any pupils added to the trip after the initial setup, will have to have the consent form and payment steps above done.