



THE
**WALDESLADE
& GREENACRE**
SCHOOLS PARTNERSHIP

Educational Visits Policy

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Statement of Equality

We have carefully considered and analysed the impact of this policy on equality and the possible implications for students with protected characteristics, as part of our commitment to meet the Public Sector Equality Duty (PSED) requirement to have due regard to the need to eliminate discrimination, advance equality of opportunity and foster good relations.

Purpose and Aims of Educational Visits and Learning Outside the Classroom (LOtC)

When dealing with trips at Walderslade and Greenacre Schools Partnership (WGSP), we aim to create a caring, secure and orderly community that ensure access for all, rich cultural diversity and opportunity for all those with protected characteristics. We believe in working towards the Gatsby benchmarks through many pathways including offering opportunity to learn outside of the classroom.

Carefully selected and planned educational visits are known to enhance learning and improve attainment and therefore form a key part of what makes WGSP a supportive and effective learning environment. External trips and visits provide our students with an opportunity to engage with the wider community and experience learning in a 'real life' context. Learning outside the classroom can help students gain a better understanding of subject areas when they see theory become reality in a relevant and stimulating environment. Being introduced to a variety of environments and situations supports the social, emotional, cultural and spiritual development of the student as they gain awareness and understanding of others and the world around them.

This policy takes into consideration: Government legislation as represented in The Education Act 2002 (amended 2011); The Equality Act 2010; The Education and Inspection Act 2006; DFE Exclusion from Academies in England; The Academy Discipline (student exclusion and reviews) 2012; The Education Regulations 2017; The Human Rights Act 1998; and the Race Relations Act 1976 (amended 2000).

Monitoring and Review

This policy will be reviewed annually but may be reviewed and updated more frequently if necessary.

Roles and Responsibilities

WGSP strives to inspire students through an engaging and balanced curriculum. We aim to provide a safe, secure and happy environment where students can develop confidently in all aspects of school life. Staff should consider the educational aims and desired outcomes when planning an educational trip to ensure that it underpins the school ethos and curriculum.



The Role of The Headteacher

In accordance with DfE national guidance, the Headteacher has appointed a member of staff as the Educational Visits Co-ordinator (EVC).

The Headteacher has responsibility for authorising all educational visits and for submitting those that are overseas, residential, or adventurous to the Local Authority for approval. Visit Leaders are responsible for the planning of their educational visits, and for entering these on EVOLVE. They should obtain outline permission for a visit from the Headteacher prior to making any commitments.

Visit Leaders have responsibility for ensuring that their educational visits will comply with all relevant guidance and requirements and should seek advice from the EVC where necessary.

The EVC will support colleagues over educational visits and learning outside the classroom (LOtC) activities. The EVC is the first point of contact for advice on visit related matters and will check visit plans on EVOLVE before submitting them to the Headteacher. The EVC sets up and manages the staff accounts on EVOLVE, and supports in uploading generic school documents, etc. The Chief Executive Officer (CEO) will countersign any overseas or high-risk activities. An annual report of trips and educational visits will be made available to the Governors and can be accessed via EVOLVE.

The Local Authority is responsible for the final approval (via EVOLVE) of all educational visits that are either overseas, residential and/or involve an adventurous activity.

Competence to Lead

We recognise that staff competence is the single most important factor in the safe management of educational visits, and so we support staff in developing their competence in the following ways:

- A mentoring system, where staff new to educational visits assist and work alongside EVC's before taking on a leadership role.
- Supervision by senior staff on some educational visits.
- All staff involved in educational visits should undergo regular training updates to stay informed on the latest safety guidelines and best practices.
- In deciding whether a member of staff is competent to be a visit leader, the Headteacher will consider the following factors:
 - Relevant experience.
 - Previous relevant training.
 - The prospective leader's ability to make dynamic risk management judgements and take charge in the event of an emergency.
 - Knowledge of the students, the venue and the activities to be undertaken.

Staff leading educational visits overseas must be aware that they will be subject to the laws of the host country.



Any educational visit that leaves the school grounds is covered by this policy, whether as part of the curriculum, during school time, or outside the normal school day. In addition to this Educational Visits Policy, WGSP:

- Adopts the Local Authority's (LA) document: 'Guidance for Educational Visits and Related Activities with National Guidance & EVOLVE' (All staff have access to this via EVOLVE).
- Adopts National Guidance www.oeapng.info (as recommended by the LA).
- Uses EVOLVE, the web-based planning, notification, approval, monitoring and communication system for off-site activities.

All staff are required to plan and execute educational visits in line with this school policy, Local Authority policy, and National Guidelines. Staff are particularly directed to be familiar with the roles and responsibilities outlined within the guidance.

As well as this, the Educational Visits Policy also links to the following policies:

- Anti-Bullying policy.
- Exclusion Policy.
- PSHE Policy.
- Drug and Alcohol Policy.
- Keeping Children Safe In Education.
- SEND Policy.
- Safeguarding and Child Protection Policy.
- Electronic devices Policy.

All students will be given equal access to educational visits. All information on educational visits will be given in a timely manner for all students, regardless of background to access and attend (subject to available places).

Types of Educational Visits

WGSP will plan and organise a range of external educational visits throughout the academic year. Parent/Carer's will be notified of these opportunities through letter and/or Arbor email and written permission (via slip/form) will be sought for out of area day visits, residential visits, overseas visits, or adventurous activities. There are different types of visits that can be arranged in support of the educational aims of the school.

Non-Residential Visits

Non-residential visits within the UK that do not involve an adventurous activity. These may include, but are not limited to:

- Visits to museums.
- Farms, Zoos.
- Theme parks.



- Theatres.
- Places of worship.

The Visit Leader must check the whole school calendar and cover diary for their proposed trip date in the first instance. If approved, the Visit Leader must then provisionally plan and submit their trip proposal on EVOLVE. Visit Leaders should follow the check list and procedures in the Appendices. The EVC and Finance Manager will receive the trip proposal and check details of the trip, including costs, before forwarding it to the Headteacher for final approval.

Overseas, Residential or Adventurous Activities

Educational Visits that are overseas, residential, or involve an *adventurous activity.

These follow the process above, but notice must be taken of the following information:

*Adventurous activity: One which is exciting and challenging and which involves inherent risk of harm, without which the activity would lose much of its value, or which takes place in a remote or hazardous location.

OEAP (Outdoor Education Advisory Panel). These may include, but are not limited to:

- Camping.
- Rock climbing (including indoor climbing walls).
- Water sports (canoeing/kayaking, sailing).
- Snow sports (skiing, snowboarding, including dry slope).
- Trampoline parks.

The PE Department

At the start of the academic year, the PE Department will request a one-off blanket consent for students regularly involved in offsite activities for the forthcoming year. The PE Department will provide parent/carer's with details of the planned fixtures. Further permission will be sought if additional fixtures are organised.

Risk Assessment

WGSP Educational Visits Checklist (see Appendix A) forms part of the risk management process for visits and off-site activities. This has been adapted from the Local Authority's generic checklist. An educational visit should only go ahead if the answer to all relevant questions is 'YES'.

Charging/funding for visits has a separate procedure for Charging and Remissions which apply to all educational visits.



Inclusion

When planning visits the school sets out with the intention to include all eligible students. Consideration is taken of factors covered by the Equality Act 2010, such as disabilities and medical needs, all reasonably practicable steps are taken to ensure compliance and inclusivity. Other factors such as behaviour are considered in line with the schools 'Behaviour Policy'. The school reserves the right to withdraw a student prior to, or during a visit if their conduct falls below the minimum standards expected as clearly outlined in the school behaviour policy and Educational Visits Terms and Conditions. Parents/cares will be responsible for costs incurred should their child need to be collected during the course of a visit.

Transport

The school maintains an updated list of staff who are qualified and approved to drive the school minibus. The trust lettings team is responsible for booking the minibus.

It is the Visit Leaders responsibility to check students are wearing their seatbelts in accordance with the law prior to departure.

Visit Leaders and accompanying staff are responsible for managing groups on public transport and should ensure students are adequately supervised at all times when using public transport.

Use of Staff Cars to Transport Students

In some circumstances, for example, where pre-booked transport has not materialised, it may be necessary for staff to use their own vehicles to transport students. Where a private (staff or parent) car is to be used to transport young people then this must be approved by the Headteacher, and a copy of insurance information ensuring that the private vehicle has business insurance. Also, a driving licence must be seen and approved before staff/parents are permitted to use their own vehicle. Students being transported in this way must have explicit permission for this type of travel. Students must not sit in the front seat of a staff/Parent vehicle.

Evaluation

Once a visit has taken place, the Visit Leader must complete the evaluation section on their EVOLVE form. This includes evaluating whether identified outcomes were met and whether the planning and risk assessments were effective. The EVC may review any visit where it is felt that procedures or outcomes have not been satisfactory and suggest modifications as a result of findings or feedback from the visit. Visit Leaders may be required to provide a written summary of their visit (including photographs) for promotional purposes.

If deemed appropriate Visit Leader/Educational Visits Co-ordinator (EVC) should collect feedback from students and or parent/carer's to help improve future visits.



Emergency Procedures

A critical incident is any incident where events go beyond the normal coping mechanisms and experience of the visit leadership team. The school's emergency plan on dealing with a critical incident during a visit is outlined below. All staff on visits are familiar with this plan and it is tested at least bi-annually and following any major staffing changes.

The school's emergency response to an incident is based on the following key factors:

- There is always a nominated emergency base contact for any visit (during school hours this is the office).
- This nominated base contact will either be an experienced member of the Senior Leadership Team or will be able to contact an experienced senior manager at all times.
- For all activities during and outside of normal school hours; the Visit Leader will leave a register of all students and accompanying adults on the visit with the emergency school contact, including the contact details of Parents/Carers and medical information as provided on the consent slips/forms.
- Visit leaders will carry:
 - A school mobile phone with the school office number stored in the contacts.
 - An LA Emergency 'Card', containing the contact details of the appointed emergency school contacts. (See EVOLVE Resources).
- The Visit Leaders and the base contacts know to request support from the Local Authority in the event that an incident overwhelms the establishment's emergency response capability, involves serious injury or fatality, or where it is likely to attract media attention.

Appropriate Non-Uniform Guidelines (e.g. Educational Visits and Charity Days)

At certain points in the academic calendar, students may be allowed to wear their own clothes, for events such as educational visits.

General Principles

- Students are expected to dress in a way that reflects positively on themselves and the school community.
- Clothing should be suitable for a professional, learning-focused environment and should not cause distraction or discomfort to others.
- All clothing must comply with health, safety, and modesty standards.



Acceptable Clothing

- **Tops:** T-shirts, shirts, blouses, sweaters, and hoodies are permitted as long as they are not offensive or excessively revealing (e.g., no visible undergarments, no low-cut tops).
- **Bottoms:** Jeans, trousers, skirts, dresses, and shorts are acceptable as long as they are of an appropriate length (skirts and shorts should fall mid-thigh or lower).
- **Footwear:** Comfortable shoes or trainers are encouraged. For safety reasons, open-toed shoes, flip-flops, sliders or excessively high heels are discouraged.
- **Accessories:** Jewellery and other accessories are permitted as long as they do not pose safety risks or serve as a distraction. Religious or cultural attire is welcomed.

Prohibited Clothing

- Clothing with offensive, obscene, or inappropriate language, images, or symbols (including references to drugs, alcohol, violence, or hate speech) is not allowed.
- Clothing that promotes gang affiliation or political extremism is prohibited.
- Garments that are excessively ripped, torn, or revealing (e.g., crop tops, excessively short skirts/shorts, clothing showing midriffs) are not allowed.
- Pyjamas or sleepwear are not considered appropriate school attire, unless for specific, pre-approved events.

Headgear

- Hats, caps, and hoods should not be worn inside classrooms unless for religious, cultural, or medical reasons.
- Sunglasses should not be worn indoors unless medically required.

Special Events and Field Trips

On certain days (e.g., school events, sports days, field trips), specific dress codes may apply. These will be communicated in advance.

Violations of the Acceptable Clothing List

If a student is found to be in violation of the acceptable clothing list from within this policy, they will be asked to correct their attire (e.g., by changing or covering up inappropriate clothing). Repeated violations may result in parent/carer's being contacted or further disciplinary action.

Cultural and Religious Considerations

WGSP respects and embraces diversity. Students are welcome to wear clothing that is reflective of their cultural or religious identity, as long as it aligns with the overall guidelines for modesty and respectfulness.



Responsibilities

- **Students:** Students are expected to follow this policy and make responsible choices in their attire.
- **Parent/Carer's:** Parent/Carer's are encouraged to support the school by ensuring that their children are dressed appropriately for school each day.
- **School Staff:** Teachers and staff will enforce the acceptable clothing list from within this policy, consistently, fairly, and respectfully, and will address violations promptly.

Exceptions

Any student who requires adjustments or accommodations due to medical, cultural, or religious reasons should notify the school administration in advance.



Appendix A – WGSP PROCESS FLOWCHART



OVERVIEW OF PROCESS TO FOLLOW FOR EDUCATIONAL VISITS

The trip organiser makes a request to their EVC via the EVOLVE trips form to obtain consent for trip to run. Organiser must complete and upload the [Trip booking form](#). This includes checking both the Whole School Calendar and Cover Diary.

THIS MUST BE COMPLETED AT LEAST 2 MONTHS BEFORE TRIP

Once approved Trip Organiser to seek quotes/costings for trip based on expected pupil numbers to include but not limited to: entry fees/tickets/travel costs/parking fees etc. and send the quotes together with a completed 'Trip/Event Costing Sheet' over to their school Executive Business Manager (EBM) for checking and to agree a contribution per student for the trip.

Once the EBM has agreed the contribution rate per student (with will be done within 3 working days for day trips and 5 working days for residential trips) they will email the organiser confirming they can go ahead.

The organiser can then issue the letter to parent/carer about the trip. This must be approved by EVC & Headteacher before sending and the this template should be used. [WGSP Educational Visits Letter](#)

The payment deadline date must be set in accordance with the payment required by the event/travel company or at the latest 1 month before the date the trip is taking place.

Once the cost is agreed and letters go out the trip will then be added to Parentpay by the Finance Office and the school will then be able to assign it to the relevant students & add any consent requests required.

The Trip Organiser may then make provisional bookings with the relevant companies for the trip if required (e.g. coach booking). Please ensure they are instructed to send all invoices to (or at least copy in) the finance team on accounts@beyondschools.co.uk. Please see detailed instructions in Educational Visits Policy (Link Below).

The Trip Organiser must review Parentpay regularly to ensure they have collected enough money to cover the trip (as originally costed for) by the deadline date for payment. If there are any issues or potential shortfalls please make your EBM aware immediately so they can support/assist you in addressing these prior to any payments to be made out.

Full details on Trips procedure can be found in the Educational Visits Policy Here:

[WGSP - Educational Visits Policy.pdf](#)

Appendix B – WGSP EDUCATIONAL VISITS TERMS AND CONDITIONS

Payment & Refunds

Payments are made on a voluntary contribution basis. In the event that we do not fill all the available spaces or receive sufficient funds through voluntary contributions to cover the cost of the trip, we may have to cancel the trip. In which case, contributions will be refunded less any non-refundable deposits we have had to pay in advance. Alternatively, we may ask for an additional contribution per student to fund the shortfall. If the event has to be cancelled due to unforeseen circumstances, then we will either endeavour to rearrange the trip for another date or provide a refund less any non-recoverable costs incurred.

Any students who cancel or withdraw from the trip any time after 1 month before trip goes will not be entitled to an immediate refund as costs will already have been calculated and paid based on numbers as at that time. If we are subsequently able to fill the space and the overall cost of the trip is not impacted, then a refund will be made but this will not be issued until after the trip has taken place and all costs have been paid.

Cases of financial difficulty will, of course, be dealt with in confidence and sympathetically, please contact Main Office as soon as possible.

Cancellations

Any students who cancel or withdraw from the trip after 14 days will not be entitled to an immediate refund as costs will already have been calculated and paid based on numbers at that time. If we are subsequently able to fill the space and the overall cost of the trip is not impacted, then a refund will be made. Refunds will be issued after the trip has taken place and all costs have been paid.

Personal Items

If students choose to take personal items such as mobile phones or cameras on the trip then it is entirely at their own risk and the school will accept no responsibility for loss, theft or damage. The use of personal items on the day will be at the discretion of the trip leader and inappropriate or unauthorised use may result in items being confiscated and not returned until the end of the day.

Behaviour

If a student's behaviour in the run-up to a trip causes the trip organiser concern about the welfare or health and safety of the trip, or if a student is suspended from school, they will not be able to go on the trip. In addition, students who receive a fixed-term suspension will be subject to a three-month ban from all school trips and extracurricular events. These activities are considered a privilege, and students taking part are representing The Walderslade & Greenacre Schools Partnership in the wider community.



Any monies that are unrecoverable from the trip will be lost unless a replacement student can be found. Staff accompanying the trip will employ the same behaviour policies and sanctions as would be expected in school. Poor behaviour on a trip may affect a student's eligibility for future trips and events.

Staff accompanying the trip will employ the same behaviour policies and sanctions as would be expected in school. Poor behaviour on a trip may affect the students place on future trips.

Oversubscription and Ballots

Where a trip is oversubscribed, the replies received by the deadline will be entered into a ballot. Ballots will be conducted on a fair and random basis, including a fair order for a reserves list. Letters will be sent to confirm a place has been secured or whether your child/ward has been unsuccessful and placed on the reserve list. Refunds will be made to all unsuccessful requests. Should your child/ward successfully secure a place, a deadline for the deposit payment will be provided and the school reserves the right to reallocate the place should the payment not be made on time, and no other communication has been received from the parent to arrange an alternative arrangement. Please inform the school as soon as possible should your child wish to refuse their place on the trip, so it can be fairly allocated to another student. Any requests to join the trip after the deadline and ballot, will be placed at the end of the reserves list.



Appendix C - WGSP DAY TRIPS/EVENTS - PROCEDURE FOR SCHOOLS & FINANCE

Trip Organiser will check within their own school in relation to trip dates/staffing requirements etc. and obtain provisional approval for trip to go ahead from EVC/HT.

When sourcing a trip/visit from a third-party supplier, trip organiser to check supplier has appropriate public liability insurance and risk assessments in place. Best practice would be to ensure the third-party trip provider have the LOTC quality badge.

Trip Organiser to seek quotes/costings for trip based on expected student numbers to include but not limited to: entry fees/tickets/travel costs/parking fees etc. and send the quotes together with a completed 'Trip/Event Costing Sheet' over to their school Executive Business Manager (EBM) for checking and to agree a contribution per student for the trip. Costing sheet will also add the 1.275% Parentpay fee onto the cost of the trip. **This should be completed at least 2 months prior to the date of the trip taking place.**

Once the EBM has agreed the contribution rate per student (***to be done within 3 working days of receiving the information in full***), the organiser can issue the letter to parents about the trip (see Terms and Conditions in Appendix B which contains all relevant information required for the parent in accordance with the DfE guidance on charging for School Activities – a link to this is to be present on all parent/carers letters that are sent out).

The payment deadline date must be set in accordance with the payment required by the event/travel company or at the latest 1 month before the date the trip is taking place.

Once the cost is agreed and letters go out the trip will then be added to Parentpay by the Finance Office (Agreed format to be used = Trip Location/date of trip/year/class group e.g. **"Thorpe Park - 15/06/23 - Year8"**) and the school will then be able to assign it to the relevant students & add any consent requests required.

The Organiser may then make provisional bookings with the relevant companies for the trip if required (e.g. coach booking). Please ensure they are instructed to send all invoices to (or at least copy in) the finance team on accounts@beyondschools.co.uk.

As soon as the booking is made the school must then raise REQs in PSF for the 'estimated costs' where they can be paid by invoice and where the supplier is already on the system. If the supplier is not in PSF or they will require an online/telephone payment by school card, then a PO form should be completed and given to the EBM pending the final confirmation of costs. (The codes to use in PSF on the REQ are V200 / XXX6500).

The Trip Organiser is responsible for regularly monitoring income received through Parentpay and ensuring contributions are received in good time before any payments are due out.



NB – If any student trip is to be funded from school held funds such as Student Premium / Bursaries / LAC then a PO form must be completed by the payment deadline date for the trip stating which budget the funding is coming from and listing the trip name, full name and year group of each student, and the amount that is being paid for them. Finance will then update Parentpay to reflect the income to the trip, arrange for the physical payment to be made into the voluntary fund account and update PSF to show the costs against the relevant budgets.

The Trip Organiser must review the account in Parentpay regularly to ensure they have collected enough money to cover the trip (as originally costed for) by the deadline date for payment. If there are any issues or potential shortfalls please make your EBM aware immediately so they can support/assist you in addressing these prior to any payments to be made out.

As invoices are received, the school must ensure they GRN those raised as REQs in PSF so the finance team know they are provisionally OK to be paid assuming enough funds have been received into Parentpay. Any delays in this will mean suppliers do not get paid in good time. Payments are made on a weekly basis by BACs so we need to receive the invoice at least 2 weeks from the payment due date.

If a student is to be refunded for any reason, please complete a refund request form to be signed off by the Headteacher/Budget holder and send it over to the finance team who will action this on Parentpay. The school should not process any refunds through Parentpay themselves.

If a last-minute opportunity arises for a trip/event to happen (i.e. less than 2 months before it takes place), then any payments that need to be made in advance of contributions being collected from students will be entirely at the risk of the school and any shortfall incurred by the time the event is over will need to be recovered from the school's own revenue budget. Payments in advance must therefore be approved by the Headteacher before they are made.



Appendix D - WGSP RESIDENTIAL TRIPS - PROCEDURE FOR SCHOOLS & FINANCE

Trip Organiser will check within their own school in relation to trip dates/staffing requirements etc. and obtain provisional approval for trip to go ahead from EVC/HT.

When sourcing a trip/visit from a third-party supplier, trip organiser to check supplier has appropriate public liability insurance and risk assessments in place. Best practice would be to ensure the third-party trip provider have the LOTC quality badge.

Trip Organiser to seek quotes/costings for the trip based on expected student numbers to include but not limited to: board & lodging/event tickets/travel costs/parking fees etc. and send the quotes together with a completed 'Trip/Event Costing Sheet' over to their school Executive Business Manager (EBM) for checking and to agree a contribution per student for the trip. Please note:

- The maximum amount we can include in the costings for 'non-specified' costs is £25.00 per student and it must be clearly stated on the trip letter the amount which has been added for 'non-specific general costs'.
- NB – Costing sheet will also add the 1.275% Parentpay fee onto the cost of the trip.
- The trip costing sheet must be completed at the latest 9 months prior to the date of the trip - this is to allow enough time for the cost to be spread over a number of instalments and for the income to be received before the final payment due date.

The Trust strongly recommends to only use a recognised Association of British Travel Agents (ABTA), or similar industry accreditation, approved tour operator when organising any residential overseas trips. (See below for what can/cannot be included in the cost to parents and reasons for using tour operators only).

Once the EBM has agreed the contribution rate per student ***(to be done within 5 working days of receiving the information in full including all quotes)***, the organiser can issue the letter to parents about the trip (see Terms and Conditions in Appendix B which contains all relevant information required for the parent in accordance with the DfE guidance on charging for School Activities – a link to this is to be present on all parent/carer letters that are sent out). The payment deadline dates must be set in accordance with the payment required by the event/travel company with the final payment date being at least 2 months before the date the trip is taking place.

The instalment dates and amounts for payments must be determined in accordance with the requirements of the tour operator/organiser deadlines and cancellation dates.

Once the cost is agreed by the EBM and letters go out, the trip will then be added to Parentpay by the Finance Office (Agreed format to be used for consistency and clarity = Trip Location/start date of trip/year or class group e.g. **"New York 15/07/23 Year8"**) and the school will then be able to assign it to the relevant students & add any consent requests required. Residential trips generally require instalment payments and there is a limit of 6 instalments to a trip on Parentpay. If you require more than 6 instalments the finance office will set the trip up in 2 elements. Please Note we cannot set up



a separate payment item in Parentpay for each instalment as this causes problems with whole trip balance reconciliation and refunds.

The Organiser may then make provisional bookings with the relevant companies for the trip if required (e.g. coach booking / tour operator). Please ensure you tell them to send all invoices to (or at least copy in) the finance team on accounts@beyondschools.co.uk.

The school must then raise REQs in PSF for the 'estimated costs' where they can be paid by invoice and where the supplier is already on the system. If the supplier is not in PSF or they will require an online/telephone payment by school card, then a PO form should be completed and given to the EBM pending the final confirmation of costs. (The codes to use in PSF on the REQ are V200 / XXX6500).

The Trip Organiser is responsible for regularly monitoring income received through Parentpay and ensuring contributions are received in good time before any payments are due out.

NB – If any student trip is to be funded from school held funds such as Student Premium / Bursaries / LAC then a PO form must be completed before the payment deadline date for the trip stating which budget the funding is coming from and listing the trip name, full name and year group of each students, and the amount that is being paid for them. Finance will then update Parentpay to reflect the income to the trip, arrange for the physical payment to be made into the voluntary fund account and update PSF to show the costs against the relevant budgets.

Throughout the instalment period the Trip Organiser must check the income received through parentpay and chase up any late contributions regularly. Once the final deadline date is reached (2 months before trip date) they must ensure they have collected enough money in Parentpay to cover the whole trip as originally costed for. If there are any issues or potential shortfalls please make your EBM aware immediately so they can support/assist you in addressing these.

As invoices are received, the school must ensure they Goods Received Note (GRN) those raised as requisitions (REQs) in PSF so the finance team know they are OK to be paid assuming enough funds have been received into Parentpay. Invoiced payments are made on a weekly basis by BACs so we need to receive the invoice ideally at least 2 weeks from the payment due date. Where online/card payments are required, we should already have the provisional PO's completed and will ask the schools to confirm by email that payments are OK to be made – please inform finance at least 1 week before the card payment is due. Any delays in this process will mean suppliers do not get paid on time which could jeopardise the booking.

If a student is to be refunded for any reason, please complete a refund request form to be signed off by the Headteacher/Budget holder and send it over to the finance team who will action this on Parentpay. School should not process any refunds through Parentpay themselves.

Staff Subsistence/Reimbursements

If staff need to be provided separately with food/refreshments whilst on a residential trip we cannot pass this cost on to the student. This has to be funded by the school, and we recommend a separate budget is retained within the voluntary fund solely for this purpose.



Staff would need to keep all receipts and produce them along with a reimbursement claim form of their costs on their return (it would be processed at the current exchange rate if trip is overseas and receipts are in currency).

Please be aware there may however be a potential tax implication as this could be classed as a benefit in kind and would need to be declared on their P11d tax return.

There must be an agreed limit set for the amount of subsistence that can be claimed by a member of staff. This should be set by their own school.

Cash on Trips

It is strongly discouraged that any cash is taken on a school trip for the following reasons:

- Risk of theft from the staff member holding the funds.
- Risk of loss of the money.
- Risk of fraud by staff.
- Risk that receipts are not kept or are not available when cash is used and we cannot account for the expenditure to the auditors.
- Unnecessary loss of money due to foreign exchange rate charges.

Ideally all costs associated with the trip itself should be paid up front before the trip takes place (either incorporated into the tour operator cost per student or invoiced directly to the school by the venue/supplier).

Reasons for trip organisers wanting cash:

- Emergencies - (e.g. taxis if students need to be taken for medical attention / refreshments for airport delays).
- Some places do not accept currency cards so cash is more flexible.
- If trip is only B&B or half board they want to pay for the extra meals for students with cash as restaurants cannot be booked & paid for in advance.

The Trust recommendation is that where it is unavoidable to use cash, the trip leader/organiser will be issued with a prepaid card that has a maximum expenditure limit of up to **£1,000.00**, (depending on the costings of the trip). This amount would incorporate £200 for emergency contingencies and the remainder would cover any 'unspecified costs' as part of the trip (which should have been calculated in the costing sheet). The card can be used to either make card payments or to make cash withdrawals if necessary (although cash withdrawals will incur a small fee) and it would be the responsibility of the trip leader/organiser to retain all receipts/evidence for any expenditure made using the card as it will need to be reconciled back to the card statement and subsequently audited.

Things we cannot do as per the DfE 'Charging for School Activities' document:

- Charge admin fees for any element of the trip.
- Charge students for the cost of supply staff to cover while school staff are on the trip.
- Charge students for the cost of school staff attending the trip who do not get a free place.



- Charge students for the cost of staff meals / refreshments whilst on the trip.
- Charge students for the cost of any extra fees incurred as a result of staff arrangements (e.g. single room occupancy).
- We cannot subsidise any students costs from other student payments – we can only charge for the things we have stated are included in the trip letter on a per student cost basis.
- We cannot retain/withhold any money received from a students if their place is subsequently taken by another student – they must be refunded in full unless there are non-recoverable costs incurred as a result of their withdrawal.
- We cannot make an extra charge for any ‘miscellaneous or contingency’ money. Every cost element being charged to a student must be supported by a quotation or some form of evidence to show how it was calculated/derived and we must state in the trip letter every cost that makes up the contribution amount being requested.



Appendix E – USE OF TOUR OPERATOR VS SELF ORGANISED TRIPS

The table below outlines the pros and cons:

PROS	CONS
They should be recognised members of ABTA providing some level of assurance.	Tour operators can be more expensive than self-organised trips.
All risk assessments will have been done and safeguarding checks by the operator on the venues/locations to be visited.	Risk assessments are required for all elements of the trip including safeguarding checks on venues with is labour intensive for staff.
Save staff time as only dealing with one company and reduces missing an element of the trip organisation.	Lots of staff time involved in dealing with multiple providers and could miss something.
Payment is by invoice in GBP and therefore easier to process through the finance system and keep on top of payments at regular agreed intervals with no extra currency conversion charges. Better for audit trail.	Payments are often in local currency and can incur currency conversion charges. Have to make multiple payments ad hoc via faster payments in excess of limits set in financial regulations handbook. Also bank may charge for faster payments.
Peace of mind for payments using a tour operator.	Banks require more stringent security checks before making large payments. Some companies will only accept payments by card over the phone which increases risk of fraud / security concern.
Single point of contact in the event of emergency situations. Full direct support.	In hands of staff to deal with all emergency situations themselves.
Insurance cover included in the trip.	Separate trip insurance needed.
Changes/cancellations to flights would be dealt with and there would be a single point of communication to sort any issues.	Would be staff's responsibility to contact airline/travel company to try and arrange new flights. This would be time consuming and potentially would need to amend accommodation as well.



Equality Impact Assessment

Who is the policy or process intended for?	Students	Employees	Govs/ Trustees	Volunteers	Visitors
	☒	☒	☒	☒	☒
Status of the policy or process:	New policy or process			Existing policy or process	
	☐			☒	
Analysis					
Protected Characteristic	Impact analysis			Explanation of impact analysis	
	Positive	Neutral	Negative		
Age:	☐	☒	☐		
Disability:	☐	☒	☐		
Sex:	☐	☒	☐		
Gender reassignment:	☐	☒	☐		
Race:	☐	☒	☐		
Religion or belief:	☐	☒	☐		
Sexual orientation:	☐	☒	☐		
Marriage or civil partnership:	☐	☒	☐		
Pregnancy and maternity:	☐	☒	☐		
Student groups (PP/SEN/CLA):	☐	☒	☐		
Evaluation and decision making					
Summary of action taken:					
Final decision:					

