

The Deanery

Church of England High School and Sixth Form College



TRAVEL POLICY

MAY 2014

Mission and Values

The Deanery C.E. High School: Mission Statement

We are all members of a Christian community,
working together as we learn and grow in faith.

Proud of our heritage, we aim
to spark enthusiasm for learning,
to foster self-discipline and mutual respect,
actively to take our part in the wider community,
and thus provide the opportunity for all of us to realise our potential.

Statement of Values

As a Christian community, we know that together everyone achieves more. Combining our strengths helps to get things done. Every member of our school community, therefore, is valued, because everyone has a part to play.

- A Christian community is a community of faith, and at the heart of faith is TRUST. Trust is about letting go - putting ourselves in God's, and in other people's, hands. Jesus told his followers to "trust in God; trust also in me"; so as we work together, we expect members of our community to be trustworthy and reliable, and not to let others down.
- But we cannot trust others unless we first RESPECT them. We believe that all human life should be respected, regardless of any differences - because we are all created by God. So we aim to foster mutual respect. God also created our environment, so we respect that too - both the natural and the man-made environment.
- From time to time, however, we all get things wrong. Jesus commanded us to show FORGIVENESS to each other, and as a Christian community we seek to obey Him. Someone in the wrong should show self-discipline and apologise, making reparation where appropriate; someone who is wronged should accept an apology and not seek to humiliate.
- These values will be all the easier for us if we show COMPASSION. Compassion is more than just sympathy: like Jesus, we aim to put ourselves in other people's shoes, understand their point of view, then do something about it - and thus to grow in faith.
- Underpinning all of these, we seek to be a community at PEACE. St Paul describes God as the God of peace. We therefore seek to demonstrate harmony, stability and security within our Christian community, downplaying dissent and accentuating the positive.

***"I am a part of all that I have met."* - Alfred, Lord Tennyson
(1809-1892)**

The guidelines contained in this document must be strictly adhered to in order to protect the school, governors, pupils and staff. To ensure that trips are organised and run efficiently each step must be monitored by the designated **E**ducational **V**isits **C**o-ordinator (EVC).

The EVC should be a senior member of staff or someone deemed suitable to undertake the responsibility and conduct staff training. At this school it is Mr Ian Boardman. Mr Boardman will act on behalf of the Headteacher with regard to the planning of trips.

If, at any stage, the EVC assesses the trip to be too much of a risk to staff and/or pupils, the trip will be cancelled.

The organiser, in conjunction with the EVC, should firstly decide on the best and most appropriate way of organising the trip (possibly having to refer to the Headteacher and/or Governing Body).

- The trip organiser must be familiar with the procedures as laid out in the information provided on acceptance of the trip application form and when permission to proceed has been given by the EVC.

- The Pack contains:
 - The Deanery Travel Policy
 - Procedures for running trips
 - Sample documents and letters
 - Risk assessment forms
 - Accident forms
 - Cash office information
 - Governors' approval forms

SECTION 1 - FINANCE

General

The Headteacher must ensure that parents are given reasonable notice of the costs of educational and off-site activities. The Headteacher must establish secure procedures for the management of associated income and expenditure. All transactions are subject to the financial standards of administration detailed in the Financial Regulations and Standing Orders for Schools. All correspondence relating to an event/ trip/ activity must be sent out via the school's official channels and a copy retained on the school's file. The school should also ensure that the financing of school trips and any guidance or advice given to parents is consistent with the school's charging policy.

Charges for School Activities

Aspects of education for which charges may not be made are laid down by statute. The following key principles may be considered to apply with particular respect to off-site activities:

- Education provided wholly or mainly during schools hours is free.
- Parents can be asked to make a voluntary contribution towards the cost of trips/visits for their child(ren). In the last resort, if the total voluntary contributions offered do not cover the cost and other sources of funding cannot be identified, this may lead to school activities being cancelled. Parents should be made aware at the planning stage if a trip will be cancelled without financial assistance from them.
- Wisepay is now available for on-line payments
- Pupil Premium pupils have £100 available per educational trip, parents/guardians are to indicate eligibility on reply slips.

Optional extras

Charges can be made for board and lodging on residential visits as well as full costs when a visit is deemed to be an optional extra. e.g.

- It falls wholly or mainly outside school hours
- Does not form part of the National Curriculum
- Is not part of a syllabus towards an exam
- Is not part of statutory religious education.

See also DCSF circular 2189 Ed Reform Act 1988 Charges to School Activities. Parents must be made aware of any circumstances when remission of charges would apply. The school's Charging Policy should have reference to remission of charges. See correspondence A139/05 Aug 2005 & A167/05 Sept 2005.

Charges to teachers supervising journeys or visits must be given careful consideration. Where the visit is of purely educational nature e.g. a trip to a theatre as part of an examination course, or of a type purely for children e.g. puppet show, it may be reasonable for the supervising teachers to be paid for. Where, however, the visit is of a recreational nature e.g. a skiing holiday, it may appear reasonable for the supervising teachers to pay, at least, part of their costs. If the family or friends of supervising teachers are permitted on journeys or visits they must be charged not less than the charge to pupils.

The organiser of every trip/ event/activity must complete a pro-forma, submit details of all persons going on the holiday free of charge and obtain the Headteacher's consent/

approval. Please see Part 1, Section 2, Annex C of the 'Financial Handbook for Schools' for templates of the pro-forma.

Financial Arrangements

Before giving approval to a journey or visit taking place the Headteacher must be aware of the following recommendations:

- Overseas holidays must only be arranged through reputable and bonded tour operators
- When selecting a particular trip/travel company the principles of best value must be applied to this process e.g:
 - How does the cost compare to similar companies/trips?
 - Is the school getting the best deal?
 - Does the company's trip meet the aims and objectives of the school visit originally agreed?
 - Is the final price competitive when compared to other providers?
 - How does the school ensure it received the most economic, efficient and effective service from those who provides it?
- Records must be retained of all quotations received in connection with the trip/ event/ activity.

When the Headteacher authorises a journey or visit he/she must retain a copy of that authorisation and endorse it accordingly. The teacher in charge of the journey or visit must be familiar with the school's internal arrangements for financial accountability and utilise a school account for this purpose.

Immediately upon receipt of confirmed costs for the major elements of the trip/event/ activity, e.g. accommodation and travel costs, parents should be notified of the overall cost per person. It should be made clear to parents what is covered as part of the overall cost. If spending money is to be included in the cost it should be itemised separately in the notification to parents. The pro-forma referred to above should be updated at this stage.

Expenditure

The school should record details of any floats required if expenditure is to be incurred during the visit.

Invoices must be obtained for all trips/visits/activities and receipts must be obtained for any additional costs that may be incurred by an individual on the day(s) that the trips/ visits/activities take place. The checking of invoices, approval for payment and the signing of cheques must be undertaken in accordance with the Financial Regulations and Standing Orders of the Council. The account must be reconciled on a regular basis. All payments should as far as possible be made by cheque.

Financial Control

All expenditure and income will be paid or received through a specific account, i.e. delegated budget, school fund or, under exceptional circumstances, a subsidiary account of the school fund specifically opened for the trip/visit/activity. The delegated budget should only be used for Educational Visits.

Bank Accounts can only be opened on the express approval of the Headteacher in consultation with Internal Audit and must bear the name of the school in the title. Bank Statements must be addressed to the Headteacher at the school. Bank accounts set up

for a specific trip/visit/activity must be closed as soon as possible after the end of trip/visit/activity, and records retained.

Cheques must require the signature of a minimum of two people from a nominated list; one of these must be preferably the Headteacher or Deputy Headteacher/Manager. No blank cheques can be signed. The account must not be overdrawn. Cash must be banked on the day received wherever possible.

Income

The following procedure must be adopted where cash is collected, in respect of the charge for the journey or visit from pupils and teachers.

A receipt must be given to each person making a payment. If the charge is paid in one payment an individual receipt must be issued; if it is paid by instalments individual payments are to be receipted. Either form of receipt must contain the date, amount paid and signature of the staff member receiving payment.

All payments are to be made to the cash office who will keep accurate and up to date records.

Where pocket money is issued to pupils a documentary record must be made and the pupil's signature obtained. At the end of the holiday the organiser should retain the records.

Financial Monitoring

In respect of major journeys, the Headteacher must arrange for the financial position to be monitored periodically before departure.

At the end of the trip/event/activity a reconciliation form should be produced by the cash office showing the final cost of the trip/ event/ activity with a comparison made against budget costs. Any material differences must be reported to the Headteacher immediately so that corrective action can be taken.

Once all transactions relating to the trip/event/activity have been completed, a statement of income and expenditure must be prepared. It must be certified by the cash office.

All expenditure receipts, invoices and supporting vouchers, income records, including copy receipts issued, spending money records, quotations and correspondence must be retained for six years after the end of the financial year in which the trip/visit/activity occurred. The records need to be retained for possible future inspection and audit.

Value Added Tax

Educational school trips and holidays provided to students and pupils by the Council can be treated as a non-business activity, provided that the provision is made as part of an agreed curriculum.

Although it is likely that most school trips and holidays will be non-business, if it does not form part of an agreed curriculum then the provision of such a holiday or trip will fall within the provisions and terms of the Tour Operators' Margin Scheme and any VAT incurred will not be recoverable. It is the Headteacher's responsibility to decide if the trip or holiday is made as part of the agreed curriculum and therefore non-business.

The VAT is only recoverable if the invoice is processed via the delegated budget.

SECTION 2 - CONSIDERATIONS

In-house organisation/external supplier

In-House Organisation

- If the organisers decide to run the trip on their own, they in effect become the travel operator. They become the same as a travel company being the supplier responsible for any sub-contracting, health and safety and possibly subject to the Package Travel, Package Holidays and Package tours Regulations 1992.
- Day visits can be organised by school staff as long as they adhere to school protocol and the trip has been authorised by the EVC and the Headmaster.

External Supplier

- Overseas and residential holidays must only be arranged through reputable and bonded tour operators. This also ensures that staff are accommodated appropriately.
- When the organisers use an external supplier then they are entitled to all the protection afforded by the health and safety and trade description legislation and the package holiday regulations.

Before considering a trip, the organiser must:

- Consult procedures for organising school trips (regular updates e-mailed to staff).
- Consider how best to organise the trip.
- Satisfy the EVC that they are capable of running the trip.
- Fill in the relevant planning forms and adhere to the information/times printed on the back of the form.

These forms are ONLY available from the EVC and are the ONLY way in which authorised trips/activities can be organised.

If using an external supplier, be validated by the school's EVC. The company must also be able to provide their current Health & Safety Policy.

SECTION 3 - CATEGORIES

Category A visits: Any local visits considered within the capability of a competent experienced teacher such as to a church, museum, theatre, other schools, sports fixtures etc. **THESE VISITS DO NOT NEED GOVERNOR APPROVAL.**

Category B visits: Visits involving increased hazards: any out of the borough, theme parks, zoo, safari parks and any involving adventurous activities.

Category C visits: Visits involving increased hazards and requiring very experienced staff with specialist knowledge and/or specific qualifications: these visits include any residential, any visit abroad, any involving adventurous activities. **SUCH VISITS MUST HAVE GOVERNOR APPROVAL – FORM AVAILABLE FROM EVC.**

LA approval/notification for Category B & C visits to be obtained via EVC (with the exception of any Wigan LA activity, e.g. Low Bank Ground).

B = Notification C = Approval

SECTION 4 - GENERAL

Any trip involving water - staff must be familiar with the document 'Safety at Water Margins' which is included in the trip information pack.

Insurance – All school trips are covered by Wigan MBC. Details are kept with the Assistant Business Manager. The party leader must take details of contact numbers etc. on residential trips. Any claims must be notified as soon as possible.

First Aid - Every leader must take a First Aid Kit (available from the First Aid Point and EVC). There should be a qualified First Aider on each trip. Fill in the appropriate Incident/Accident Form on return to school (school Incident/Accident Form is in printable form provided in the information pack) for all trips.

If the trip is approved – staff must follow the procedures laid down on the Procedures for organising school trips information provided by the EVC. Staff will be given all the information and files necessary, including updates via e-mail.

Rarely Cover - changes to procedures were introduced in September 2009 regarding cover for staff. A sum of money will be designated to pay for cover staff which will be monitored in future years. Procedures are as follows:

1. Before any trip can be authorised it must be cleared for any cover requirements.
2. The **MINIMUM** notice for cover is 4 weeks.
3. When cover is arranged you will receive a confirmation slip.
4. Trip planning forms will only be issued by the EVC on receipt of the confirmation slip or if no cover is required.

Procedure for organising trips 2013-14

Refer to school trips and visits on shared area. For letters and forms open file 'useful info', then 'letters and forms'.

1. E-mail me/see me about the details and outline of the proposed trip.
 2. Think about proposed numbers (reserves/shortfall) Free School Meal entitlement **exam clashes**
 3. Discuss with EVC, HoD, Dep Head i/c Cover, Head, T Wogan (school calendar)
 4. Fill in trip request form **e-mail to me** – make note of cost section (optional extra/coursework)
 5. I will reply via e-mail with approval Yes/No and category, also with attached planning forms. **Only these can be used**
 6. Proceed as usual – arrange cover via yellow form for all staff on the trip, see cash office if money involved to set up an account.
 7. *Submit information to cash office for WisePAY*
 8. Plan how best to distribute the letters fairly.
 9. Decide the cut off time for deposits and allocation of places.
 10. Plan how/when will you get medical information and how much do you need?
(see I Boardman for advice)
 11. Create the letter home (faculty admin or trip organiser) and have it checked by I Boardman/Head. Have initial planning form checked and signed before letters go out.
 12. Distribute letters/information.
 13. Cash office to collect deposits
 14. Collect reply slips and create a register of participants.
 15. Plan the trip –itinerary, risk assessment, lists. Book coaches, seats, train tickets etc.
- Finally***
16. Hand the form with all documents and replies to me for checking bearing in mind deadlines (on back p2 of the planning form). Please use the check boxes and allow as much time as possible to get everything checked.
 17. I will notify you by e-mail
 - a. if anything is missing
 - b. **Final approval given Y/N by the Headteacher (by e-mail)**
 18. All paperwork will be passed onto finance if money is involved (make sure you have enough funds to cover costs) or if no money involved it will go directly to the Head for final approval.

This policy was approved by the Resources Committee on 1st May 2014

Signed



Mr G Speakman, Chair of Resources Committee

Next review date: June 2016