

Policy Title: Educational Visits Policies and Procedures	Updated Date:	October 2025
Staff Member Responsible: Assistant Head Co-Curricular	Review Date:	September 2026

Context

All educational visits at Westonbirt are designed to enable us to meet our purpose of inspiring success in our pupils. We believe that educational visits are an integral part of the entitlement of every pupil to an effective and balanced curriculum. Appropriately planned visits are known to enhance learning and improve attainment, and so form a key part of what makes Westonbirt a supportive and effective learning environment. The benefits to pupils of taking part in visits and learning outside the classroom include, but are not limited to:

- Improvements in their ability to cope with change.
- Increased critical curiosity and resilience.
- Opportunities for meaning making, creativity, developing learning relationships and practicing strategic awareness.
- Increased levels of trust and opportunities to examine the concept of trust (us in them, them in us, them in themselves, them in each other).
- Improved achievement and attainment across a range of curricular subjects. Pupils are active participants, not passive consumers, and a wide range of learning styles can flourish.
- Enhanced opportunities for 'real world' 'learning in context' and the development of the social and emotional aspects of intelligence.
- Increased risk management skills through opportunities for involvement in practical risk-benefit decisions in a range of contexts. i.e. encouraging pupils to become more risk aware as opposed to risk averse.
- Greater sense of personal responsibility.
- Possibilities for genuine team-working including enhanced communication skills.
- Improved environmental appreciation, knowledge, awareness and understanding of a variety of environments.
- Improved awareness and knowledge of the importance and practices of sustainability.
- Physical skill acquisition and the development of a fit and healthy lifestyle.

Application

Any 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 Policy, Westonbirt School: -

1. Adopts National Guidance www.oeapng.info
2. Uses EVOLVE , the web-based planning, notification, approval, monitoring and communication system for off-site activities.

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

Scheduling of Educational Trips and Positioning in the School Calendar

The scheduling and dates of all educational trips and school visits must be approved by the Assistant Head (Staffing and Strategic Planning) and Deputy Head Academic in the calendar meeting held before the start of the academic year. The calendar meeting will take place in May before the calendar is published and will look at the planning of all educational visits and trips for the following academic year.

Approval of all trips will take into consideration the following:

- Relevance and impact to the subject curriculum
- Impact on lessons missed by pupils and teachers by attending the proposed trip
- Financial impact on parents
- Cover requirements and cost of providing cover
- Other school events impacting the availability and workload of pupils and staff at the time of the proposed trip
- Other trips for the year group in the same term or academic year

Group Leaders should enter the required information on EVOLVE for Outline Approval before the Calendar Meeting in May to enable the Assistant Head (Staffing and Strategic Planning) and the Deputy Head Academic to be aware of all proposed trips.

It is acknowledged that to provide the best opportunities for our pupils, there may be some educational visits and trips added to the calendar during the school year. These trips must be approved from the outset by the Assistant Head (Staffing and Strategic Planning) and Deputy Head Academic using the criteria above.

Scheduling and Overseas Trips

Group Leaders must consult the Assistant Head Co-Curricular when considering an overseas trip to ensure the proposed trip fits with the school's ongoing Global Programme. Parents and pupils should be given over

12-months' notice of these trips and in the case of more expensive trips over 18-months' notice.

Types of Visit & Approval

There are two main categories of visit:

- 1. Non-residential visits within the UK that do not involve an adventurous activity. Eg. visits to museums, farms, theme parks, theatres, etc.**

These are entered on EVOLVE by the **group** leader and submitted for Outline Approval by the **Assistant Head (Staffing and Strategic Planning)**. The form is then returned to the Group Leader to complete the checklist on EVOLVE. It is then submitted for approval by Finance and the documentation is checked by the Director of Estates and Services. Finally, when the EVC is content with the EVOLVE form, the trip is approved. These trips might also be submitted to the Head for final approval.

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

These follow the procedures above, but the EVC may provide comment prior to passing on to the **Head for final approval**.

Roles and responsibilities

Refer to: 'Planning Basics' and 'Checklists' in National Guidance: <http://www.oeapng.info>^[1]_{SEP}]

The role of the Head is to:-

- Be satisfied that there is a declared and valid reason for the event. This is delegated to the team who approve visits on EVOLVE.
- Approval is granted after consideration of the impact on the curriculum, the value to pupils and any lesson time missed.
- Approve or reject the initial application for any high risk and overseas residential visit.
- Be satisfied that visits comply with the regulations and guidelines as promulgated in this policy, the ISI handbook for the Inspection of Schools, OEAP National Guidance (**Sept 2025**), DfE Guidance 2022 Health and Safety responsibilities for schools.
- Ensure that the Educational Visits Coordinator (EVC) is competent to oversee the coordination of all off-site educational visits.
- Ensure appropriate financial planning.
- **Approve all trips that are overseas, residential, or involve an adventurous activity and where appropriate the non-residential visits in the UK.**

Refer to: 'Head / Manager' in National Guidance <http://www.oeapng.info>^[1]_{SEP}]

The role of the Director of Estates and Services is to: -

- Ensure that all educational visits are planned meticulously using standardised forms which are uploaded onto EVOLVE.
- Ensure that appropriate vetting of all staff and any volunteers accompanying the party has been checked for overseas and activity trips
- Keep records of individual visits including reports of accidents or 'near misses'.
- Ensure that visit evaluation is used to inform future visits and staff training needs.
- Flag up any concerns with the Senior Leadership Team.
- Ensure that visits have appropriate staff supervision and cover for health and safety, first aid, medication and behavior management.
- Ensure compliance with statutory or other best practice guidance (e.g. Institute for Outdoor Learning)
- Check third party liability insurance and other certification (HSE Adventure Activities Licensing Authority etc.)
- Ensure adequate Insurance cover

Refer to: 'Head / Manager' in National Guidance <http://www.oeapng.info>^[1]_{SEP}

The role of the Deputy Head Academic is to:

- Maintain an overview of the timing of all educational visits and how they match the subject curriculum.
- **With the Assistant Head (Staffing and Strategic Planning)** check that the proposed dates for the visit or activity are suitable by reference to the school's calendar and how they integrate with other whole school events.
- When **considering the scheduling and outline approval of trips, with the Assistant Head (Staffing and Strategic Planning)** ensure that there are sufficient members of staff left in School to provide cover for emergencies and illness.

Refer to: 'Head / Manager' in National Guidance <http://www.oeapng.info>^[1]_{SEP}

The role of the Assistant Head (Staffing and Strategic Planning) is to:

- **Work with Group Leaders on the scheduling and planning of educational visits and trips.**
- **Consider an overview of the timing of all educational visits and how they integrate with other whole school events.**
- **Check that the proposed dates for the visit or activity are suitable by reference to the school's calendar and how they integrate with the whole school events.**
- **Check that there are sufficient members of staff left in school to provide cover.**
- **Approve or Reject on EVOLVE all requests for outline approval.**

The role of the Educational Visits Co-Ordinator (EVC) is to:

- Give advice for, and approve each step of the planning stages for any trip for which the initial approval has been given.
- Ensure that all members of staff involved in the planning and execution of a visit are aware of the guidelines available.
- Ensure that the Group Leader is competent and possesses the appropriate experience and training to undertake the activity
- Work with the Group Leader to provide full and timely details of the visit to parents and obtain their consent or refusal.
- Organise the emergency arrangements and ensure there is an emergency contact for each visit.
- **Comment on EVOLVE where necessary to help manage the approval process.**
- **Forward the final trip approval onto the Head after all stages of the EVOLVE chain have been adequately completed.**

Refer to: 'Educational Visits Coordinator' in National Guidance www.oeapng.info

The role of the Group Leader is to:

- Have full responsibility for the planning and safe conduct of the activity, in accordance with this policy and its supplementary guidance, and for ensuring all participants are aware of their roles. Leaders accompanying pupils are in 'loco parentis' and are responsible for their safety and well-being at all times.
- The Group Leader's duty is to exercise the higher level of care than that of a parent. Other supervising adults will also have a duty of care, but the Group Leader retains overall responsibility. It is the duty of care of the Group Leader to ensure, wherever possible, that the competence of each member of staff is appropriate to her/his role.
- Submit detailed plans to the Educational Visits Coordinator (EVC) via EVOLVE.
- Identify the clear purpose and objectives of the visit and provide **relevance and impact to the subject curriculum.**
- Carry out and provide a written record of a comprehensive risk assessment.
- Arrange briefing meetings with parents, as appropriate, for high risk, residential and overseas visits.
- Whilst it is not essential for each group to be accompanied by a qualified First Aider, it is an aspect that should be considered at the planning stage of each event.
- Obtain Medical Needs from iSams and **forward an up-to-date trip pupil list to** the Health and Wellbeing Centre, to discuss the pupils on the trip in order to ensure that any specific medical and health issues of pupils or accompanying staff are considered within the planning stages and their needs are catered for.
- **Forward an up-to-date trip pupil list to the Head of Safeguarding in case there are any ongoing concerns that need to be highlighted.**
- Complete the visit documentation and obtain the appropriate approvals from the Evolve management team for any visit off-site, whatever the duration.

- Plan the itinerary in sufficient detail to identify every period of the visit including meal, rest and recreational times.
- Have or obtain prior knowledge of the venue.
- Assess, wherever practicable, the suitability and safety of any accommodation to be used. In addition the window and room locking policy should be established and communicated to parents.
- Inform parents of the detail of the visit, including its nature, purpose and related activities, and obtain their permission/consent for their son / daughter to take part.
- Ensure that parents are fully informed of the schedule for the collection of payments before any bookings are made.
- Allocate supervisory responsibility, to each adult accompanying the visit, for named pupils and ensure that the adults understand that they are responsible directly to the Group Leader.
- Ensure that all the pupils in the party and the accompanying adults are fully aware of the risk assessments, emergency plans and the expected standards of behaviour.
- Ensure that staff have requested cover via the Cover Co-ordinator.
- When on the visit, 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.
- Ensure that on return from a visit, all pupils are delivered, where appropriate, into the care of a person with parental responsibility or their representative.
- Conduct 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 report should be lodged with the EVC.
- Check when planning an activity requiring it, the provider holds the LOTC Quality Badge, AALS etc.

Refer to: 'Visit Leader' in National Guidance www.oeapng.info

Refer to: 'Assistant Leader' in National Guidance www.oeapng.info

Role of Parents and Guardians

Parents and Guardians are requested to:

- Carefully read all information regarding the proposed visit before giving written consent.
- Provide up to date medical and emergency contact details, informing the school in writing before the visit commences.
- Support the school in upholding the Code of Conduct for educational visits.
- Make all payments by the deadlines given, taking note where payments are non-refundable.
- Inform the School immediately if their son or daughter has to withdraw from the visit for any reason, honouring any outstanding commitments to further payments.
- Arrange, where appropriate, for the prompt collection of their son or daughter on their return from the trip.

Refer to: 'Parents' in National Guidance www.oeapng.info

Staff Competence

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

- An apprenticeship system, where staff new to visits assist and work alongside experienced visit leaders before taking on a leadership role.
- Supervision by senior staff on some educational visits.
- Support for staff to attend training courses relevant to their role, where necessary.

In deciding whether a member of staff is competent to be a visit leader, the EVC will take into account 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 pupils, the venue, and the activities to be undertaken.

Refer to: 'Assessment of Competence' in National Guidance www.oeapng.info

Staffing and Supervision

On all visits there must be an 'effective level of supervision' that has been approved by the EVOLVE management team.

The visit leader and the EVOLVE management team must make a professional judgement regarding the number and suitability of staffing on an individual visit basis, after consideration of the following factors:

- the type, level, and duration of activity;
- the nature and requirements of individuals within the group, including those with additional needs;
- the experience and competence of staff and other adults;
- the venue, time of year and prevailing/predicted conditions, if applicable;
- the contingency, or 'Plan B' options.

A visit must not go ahead where either the visit leader or the EVOLVE management team is not satisfied that an appropriate level of supervision exists.

Visit leaders often find it helpful to have 'a starting point for consideration'. Where departure from the starting point results in fewer staff, the justification should be recorded as a note on EVOLVE.

See 'Underpinning Framework' on National Guidance www.oeapng.info

Staff who are assigned to support the special needs of an individual cannot be included in the overall staffing ratio. Their responsibility should not include the wider group.

Particular consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits.

Vetting and Disclosure and Barring (DBS) Checks

Staff and volunteers who work frequently or intensively with, or have regular access to young people or vulnerable adults, must undergo an enhanced DBS check with barred list check as part of their recruitment process. For the purpose of this guidance: 

- '*frequently*' is defined as 'once a week or more'.

- '*intensively*' is defined as 'four or more days in a month, or overnight'.

Refer to: 'Vetting and DBS Checks' in National Guidance www.oeapng.info

Direct, Indirect and Remote Supervision

Young people must be supervised throughout all visits, even though they may be unaccompanied at times.

Direct supervision is where a member of staff is with a young person / group.

Indirect supervision is where young people are unaccompanied by a member of staff, but where there is a member of staff in the vicinity, for example as might occur in a museum or shopping centre, or 'down-time' at an activity centre.

Remote supervision is where young people are unaccompanied by a member of staff, and the supervising member of staff is not necessarily in the immediate vicinity, for example as might occur during D of E expeditions, or a 6th Form unaccompanied visit to university open day.

Indirect and Remotely supervised activities can bring valuable educational benefits, and the progression from dependence to independence is to be encouraged. Such activities develop essential lifelong skills, including managing risk, self-sufficiency, interaction with the public and social skills, decision making, etc.

The decision to allow indirect or remote supervision should be based on professional judgement taking into account such factors as:

- prior knowledge of the individuals (including their maturity and levels of responsibility);
 - venue and conditions;
 - the activity taking place;
 - preparatory training;
 - the competence of the supervising staff;
 - the emergency systems in place.
- When recording a **remotely** supervised visit on EVOLVE, there must still be a named visit leader. This will be the member of staff that has made a professional judgement regarding the level of responsibility and maturity of the participants, and decided that in their opinion it is reasonable for them to be undertaking the specific activity unaccompanied by an adult. A 'Note' should be added to EVOLVE specifying that remote supervision applies.

Refer to the following documents in National Guidance www.oeapng.info

'Ratios and Effective Supervision'

'Group Management and Supervision'

'Vetting and DBS Checks'

First Aid

For all visits there should be a responsible adult with a good working knowledge of first aid appropriate to the environment (eg. urban, remote, water, etc).

General 'life experience', or a three hour non-assessed 'Basic Skills' course is suitable for routine urban visits. However the nature of the visit may indicate that a higher level qualification is appropriate, especially in circumstances where it is likely that access by the emergency services may be delayed.

Based on the nature of the particular visit, the EVC (or visit leader) should make a professional judgement regarding the level of first aid required.

For children in the Early Years Foundation Stage, there is a statutory requirement that at least one person who has a current paediatric first aid certificate and sufficient understanding and use of English to summon help in an emergency must accompany children on outings.

A first aid kit appropriate to the visit should be carried.

Refer to: 'First Aid' in National Guidance www.oeapng.info

Overseas Visits

For all visits it is essential that consideration is given to the following:

- a) Culture: food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol & drugs.
- b) Accommodation: checked for suitability, security, safety precautions and emergency evacuation.
- c) Transport systems have been assessed as safe for use.

The visit leader should consider the relevant country information from the overseas and Commonwealth Office website: www.fco.gov.uk (from the home page select 'Travel Advice'). All relevant FCO information should be circulated amongst the staff team.

The UK's exit from the European Union (EU) has resulted in some changes to procedures and requirements. Government advice on travel to the EU, Switzerland, Norway, Iceland and Liechtenstein is at www.gov.uk/visit-eu-switzerland-norway-iceland-liechtenstein and in the section on "school trips and exchanges" at

www.gov.uk/government/collections/guidance-for-schools-during-the-transitionperiod-and-after-1-january-2021.

For exchange visits:

- Westonbirt has adopted the Outdoor Education Advisers' Panel guidance document: *Young People's Exchange Visits*. ^[SEP]
- Refer to the British Council (Learning) www.britishcouncil.org For Overseas Expeditions see relevant sections ^[SEP]

Refer to: 'Overseas Visits' in National Guidance www.oeapng.info ^[SEP]

Weather, Clothing & Survival

Where appropriate, the leader must obtain and act upon recent weather forecasts and local advice.

Participants should be adequately clothed appropriate to:

- The time of year, prevailing weather conditions, altitude and exposure to elements;
- Likely changes in weather;
- The experience and strength of the party;
- The nature of the visit and environment. When venturing away from immediate help, leaders should consider the need for:
 - Comfort, insulation and shelter for a casualty;
 - Comfort, insulation and shelter for the whole group;
 - Provision of emergency food and drink;
 - Torch;
 - Possible need of signaling equipment and/or mobile phone (NB. Mobile phones may not work in remote areas). It is primarily the responsibility of the visit leader, in consultation with other staff where appropriate, to modify or curtail the visit or activity (eg Plan B) to suit changed or changing circumstances - for example: over-busy lunch area, rain, rising water levels, etc.

Definition of an 'adventurous activity'

The following activities are regarded as 'adventurous' and require EVC comment:

- All activities in 'open country' (see below)
- Swimming (all forms, excluding publicly lifeguarded pools)
- Camping
- Canoeing / kayaking
- Sailing / windsurfing / kite surfing
- Rafting or improvised rafting
- Use of powered safety/rescue craft
- All other forms of boating (excluding commercial transport)
- Water skiing / Wakeboarding
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Rock climbing (including indoor climbing walls)
- Abseiling
- River/gorge walking or scrambling
- Coasteering/coastal scrambling/sea level traversing
- Underground exploration
- Shooting / archery / paintballing
- Snowsports (skiing, snowboarding, and related activities), including dry slope

- Air activities (excluding commercial flights)
- Horse riding
- Motor sport – all forms^[1]_{SEP} High level ropes courses
- Off road cycling
- ‘Extreme’ sports
- Other activities (eg. initiative exercises) involving skills inherent in any of the above

‘Open country’ is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the local authority if you think this might apply.

For the purposes of EVC comment, the following activities are not regarded as adventurous and therefore do not require comment. However, these activities must be supervised by a member of staff who has previous relevant experience and who in the opinion of the Evolve management team is competent to supervise the activity:

- Walking in parks or on non-remote country paths
- Field studies - unless in the environments stated in ‘open country’
- Swimming in publicly lifeguarded pools
- Theme parks
- Tourist attractions
- Pedal go-karts
- Ice skating (rink)
- Farm visits
- Local traffic survey
- Museum, library, etc.
- Physical Education and sports fixtures (other than the above)
- Water-margin activities

Please contact the EVC via EVOLVE if there is uncertainty over whether a particular activity requires Advisor comment.

Adventurous Activities

This section is applicable to all adventurous activities except the following, for which separate guidance applies:

- Water-based activities
- Open country activities
- Snowsports
- Overseas expeditions

The responsibility for the safety of participants in an adventurous activity will rest with either:

- a) **An external provider** – The provider must hold an LOTC Quality Badge or complete a Provider Form. Note: If a Provider holds an AALA licence (and/or any other accreditation) but not an LOTC Quality Badge, then a Provider Form is still required.

Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

or

- b) **A member of your establishment's staff** - This person must be specifically approved by the Evolve management team to lead the activity, via EVOLVE.

Open-country activities

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

For the purposes of this policy, 'open-country' is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Open-country activities are regarded as 'adventurous' and therefore these visits require EVC comment and Head approval.

The responsibility for the safety of participants in an adventurous activity will rest with either:

- a) **An external provider** - The provider must hold an *LOtC Quality Badge* or complete a *Provider Form*. Note: If a Provider holds an *AALA licence* (and/or any other accreditation) but not an LOTC Quality Badge, then a Provider Form is still required. Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

or

- b) **A member of your establishment's staff** - see below

The following minimum levels of technical competence apply where a member of the establishment's own staff intends to lead an open-country activity:

- a) For leaders of walking groups outside the UK or Ireland, please contact the EVC for further guidance.
- b) For leaders of walking groups in mountainous terrain within the UK and Ireland - Mountain Leader Award (Summer or Winter as appropriate) www.mltuk.org **or** - A written statement of competence by an appropriate technical adviser
- c) For leaders of walking groups in summer conditions in non-mountainous hilly terrain (known variously as upland, moor, bog, hill, fell or down), with well-defined obvious boundaries, such as roads and coastlines, and where any hazards within it are identifiable and avoidable, and where wild camping or movement on steep ground is not involved. - Walking Group Leader Award www.mltuk.org **or** - A written statement of competence by an appropriate technical adviser
- d) For leaders of walking groups in terrain 'easier' than that defined in c) The leader must demonstrate an appropriate level of competence. This may include one or more of the following:
 - Countryside Leader Award. See www.countrysideleaderaward.org
 - Sports Leaders UK Level 3 Award in Basic Expedition Leadership (BEL). See www.bst.org.uk
 - Completion of a suitable 'Leader Training' Course.
 - A written statement of competence by an appropriate technical adviser
 - Evidence of recent, relevant experience, appropriately corroborated.
 - An assessment of competence (written or implied) by the Head of Establishment.

Snowsports

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

Snowsports (e.g. skiing and snowboarding) are regarded as adventurous activities, and the visit therefore requires EVC comment and **approval from the Head**.

There are advantages to snowsports taking place during term time as opposed to during the establishment holiday period. These include: greater choice generally, less queuing for lifts, less crowded slopes therefore less chance of collisions occurring, less crowded resort, higher possibility of 'sole use' of accommodation, lessons more likely to be conducted by permanent snowsport establishment instructors (as opposed to 'casual' instructors), greater likelihood of English speaking instructors, considerable cost savings through avoiding high season (possibly allowing more young people to participate), etc.

A member of staff intending to organise a snowsport visit (but not instruct, lead or supervise on snow) must hold the Snowsport Course Organiser Award (SCO), administered by Snowsport England

www.snowsportengland.org.uk and must have previously accompanied at least one educational snowsports visit.

Young people may only participate in snowsports when under the direction of an appropriately qualified and competent person. This would normally be an instructor employed by the local snowsports school. Establishments should therefore consider the merits of fully instructed lessons of 4/5 hours duration per day.

A member of staff intending to lead skiing or snowboarding (ie. not using a ski school instructor) must be qualified as below and have been approved by the EVC and Deputy Head Academic via EVOLVE: -

Skiing: The minimum qualification to lead skiing on snow is:

- The Alpine Ski Course Leader Award (ASCL) www.snowsportengland.org.uk **or**
- The Alpine Ski Leader Award (ASL) www.snowsportscotland.org **or**
- A statement of competence by an appropriate 'technical adviser' -

Snowboarding: The minimum qualification to lead snowboarding on snow is:

- The Snowboard Leader Award (SBL) administered www.snowsportscotland.org **or**
- A statement of competence by an appropriate 'technical adviser' -

Pupils may only take part in off-piste activities if:

- a) under the direction of a suitably qualified local instructor, AND
- b) they will remain within the designated controlled areas, AND
- c) off-piste activities are specifically included within the visit insurance policy, AND
- d) a NOTE is added to EVOLVE in advance of the visit, confirming that the above criteria are/will be complied with.

Refer to 'Snowsport visits' in National Guidance www.oeapng.info

Overseas Expeditions

Overseas Expeditions (for the purposes of this document) are defined as those which typically involve journeying in remote areas of the world and/or in developing countries.

There are stringent requirements on Overseas Expedition providers, and visit leaders may therefore need to allow up to 18 months for advisor comment to be granted. A 'Note' (for the attention of the Outdoor Advisor) should be added to the EVOLVE Visit Form as soon as possible during the planning stages.

Overseas Expeditions will only be approved if the provider either:

a) Holds an LOTC Quality Badge www.lotcqualitybadge.org.uk

or

b) Provides a statement of compliance with *Guidance for Overseas Expeditions, Edition 4*

For providers that do not hold an LOTC Quality Badge, 'Guidance for Overseas Expeditions, Edition 4' should be referred to when the proposal is initiated. This document contains information for both visit leaders and providers, and includes a checklist of vital aspects that **must** be considered prior to the establishment making a commitment with an external provider. Overseas expedition providers are required to comply with the minimum standards specified in this document.

When planning an expedition and selecting a provider, visit leaders should particularly consider the educational aims of the venture, that appropriate progression takes place, and that the requirements relating to 'Best Value' are met.

Visit leaders may find it beneficial to attend the one day course entitled 'Overseas Expeditions and Fieldwork: a Course for Teachers and Youth Leaders' organised by the Royal Geographical Society www.rgs.org/eac

Refer to: 'Overseas Expeditions' in National Guidance www.oeapng.info

Approval of staff to lead an adventurous activity PROCEDURE FOR OBTAINING APPROVAL

Staff who wish to **lead** (ie. supervise or instruct) an adventurous activity, must first upload details and scanned copies of all relevant qualifications (eg instructor certificates, first aid, etc) to the 'My Details' section of their EVOLVE account.

The visit leader should complete the Visit Form on EVOLVE as usual. During this process EVOLVE will ask for an Activity Leader Form (ALF) to be completed, which will request further details regarding the proposed venture (eg dates, venues, numbers, etc). The ALF will then be embedded within the Visit Form for that particular visit.

On receipt of a Visit Form (and embedded ALF), the EVC will view the proposed activity in the context of the leader's competencies and qualifications.



Where approval is not granted to lead the activity, the Visit Form will be returned to the visit leader via EVOLVE, with an attached note. Where this is the case the activity must not take place.

CRITERIA FOR APPROVAL

Approval will normally be given where the leader of the activity has recent relevant experience, and:

- is appropriately qualified through the relevant National Governing Body, *or*
- has a 'Statement of Competence' from an appropriate 'technical adviser' – see below.

For most activities the competence required of a technical adviser is stipulated by the activity's National Governing Body. For further clarification regarding a technical adviser 'Statement of Competence' please contact the EVC.

In some cases approval may be granted where no qualification is held, but the person concerned is deemed by the EVC to have a sufficient level of competence in addition to recent relevant experience.

In cases where no National Governing Body exists, the EVC will make a decision based on factors which may include: technical advice, the leader's stated competence, observed competence, past experience, and attendance at training courses.

Approval will always be subject to a requirement that the leader must act at all times within the remit of his/her qualifications, and in accordance with National Governing Body Guidelines where these exist. Approval may also be subject to other conditions which will be specified by the EVC on the Visit Form.

Where there is insufficient information for the EVC to make a decision regarding approval, then the applicant may be asked to provide further information (e.g. evidence of awards, experience, and log book details, etc). In some cases a meeting with the applicant may be requested by the EVC.

Approval to lead an adventurous activity is specific to the technical aspects of the adventurous activity detailed. It is not an indication in respect of other aspects of the visit such as general management and supervision skills, the assessment of which may be the responsibility of **the Head** and/or EVC.

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 has an emergency plan in place to deal with a critical incident during a visit (see Appendix 2). All staff on visits are familiar with this plan and it is tested at least bi-annually and following any major staffing changes.

Refer to: 'Critical incident management' in National Guidance www.oeapng.info

Refer to: 'Emergency planning establishment' in National Guidance www.oeapng.info

Refer to: 'Emergency procedures for visit leaders' in National Guidance www.oeapng.info

Educational Visits Checklist

Westonbirt School's Educational Visits Checklist forms part of the risk management process for visits and off-site activities, and may be downloaded from EVOLVE Resources. A visit should only go ahead if the answer to all relevant questions is 'YES'. This can be completed and attached to EVOLVE or used as an aide-mémoire. See Appendix 1.

Parental/Guardian Consent

Consent is not required for activities within the School Learning Area that are part of the normal curriculum during normal school time.

The school obtains blanket consent at the start of each year for certain other routine activities, eg. after school fixtures, etc. Parents must complete an EVOLVE or paper consent form.

Specific, (ie. one-off), parental consent must be obtained for all other visits. For these visits, sufficient information must be made available to parents (via EVOLVE, letters, meetings, etc), so that consent is given on a 'fully informed' basis.

Refer to: 'Parental Consent' in National Guidance www.oeapng.info

Inclusion

Under the Equality Act 2010, it is unlawful to discriminate against disabled participants because of their disability, without material or substantial justification. The school is required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage. However, the Equality Act does not require responsible bodies to place employees or participants at inappropriate risk if a health and safety issue arises. It is also the case that the adjustments made to include a disabled young person should not impinge unduly on the planned purpose of the activity.

Refer to: 'Inclusion' in National Guidance www.oeapng.info

Charging / funding for visits

The cost of all visits must be budgeted for within the School's annual budget process or covered by a supplemental charge to parents. Payments may be broken down into installments which should aim to match the School's financial outlay leading up to the trip, but in all cases the final installment must be paid prior to the visit. In general, payment from parents must be received in full prior to each visit.

Separate confirmation, by e-mail to the Finance Office, of the list of parents who have consented to the charge being added to their invoice is required in all cases.

Transport

It is expected that all transport is of an equal standard to that expected in the United Kingdom when pupils undertake a trip/visit using either public transport and/or private hire. Where this is not the case, parents must be informed before they consent to the trip/visit. It must not be assumed that the legal requirements in another country are the same as those in the United Kingdom.

Where it is deemed appropriate that pupils use their own cars and/or lift share parental permission must be sought both for the driver and any passengers. The trip leader is expected to consult the EVC. ^[1]Where a third party is used to provide transport the same factors should be considered. Similarly, where standards of transport such as safety (e.g. seat belts) do not meet those demanded in the UK, parents must be informed in advance.

Refer to: 'Transport general considerations' in National Guidance www.oeapng.info

Insurance

Refer to: 'Insurance' in National Guidance www.oeapng.info ..

General

The school insurance policy covers most educational visits. Advice on what is covered should be sought from the Finance department. Additional arrangements may be necessary to obtain insurance cover for activities abroad and activities of a potentially hazardous nature. The group leader should also ascertain the details of the insurance held by any tour operator being used. Additional cover may also be necessary for participants with medical conditions. The group leader should check this with the insurance company via the Finance department before departure. The group leader should write to the parents to tell them which responsibilities the school accepts and the scope of any insurance cover the school is to arrange. It is advisable to make copies of the insurance schedule available to parents as early as possible in the booking process.

Cancellations

Some parents may cancel their pupil's place in the visit. The group leader should forward any cancellations to the insurer/operator as soon as possible, in writing, if a replacement is not available. Delay in notification may incur cancellation charges.

Transport

The Group Leader must communicate with the Transport Manager to gain a cost for all transport requirements. Until final numbers are known, an estimated transport cost may be required to enable an approximate price to be communicated to parents. When final numbers are known, the exact cost of the trip must be confirmed with parents.

When hiring coaches etc. the Group Leader should check with the Transport Manager that the company used has appropriate insurance. When using school/private vehicles, the Group Leader should check that the insurance policy is appropriate to the journey.

Taking a school minibus abroad will require permission of the Transport Manager and may require extra insurance. It may also require specific training or qualifications. It is the organiser's responsibility to check this. The Visit Leader should also check that the teacher driving the school minibus abroad is appropriately insured and that their driving licence is valid for the countries to be visited or passed through en route.

Swimming

All swimming activities and venues must be included within the visit plan, and lifeguarding arrangements checked in advance. This is particularly important in respect of visits abroad, where for example, a hotel pool may be available.

Young people must be supervised by a competent adult at all times whilst undertaking swimming activities. The following criteria apply:

Swimming pools (lifeguarded)

- UK Swimming Pool safety is guided by various Health and Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure that teaching and coaching activities are conducted safely. ^[1]_[SEP]
- For publicly lifeguarded pools abroad, the establishment's staff must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water. ^[1]_[SEP] Unless suitably qualified, the establishment's staff should not have responsibility for lifeguarding. However, they do retain a pastoral role for participants at all times either through direct or 'remote' supervision.

For swimming lessons, the visit leader should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current guidelines.

Refer to: 'Swimming in a Swimming Pool' in National Guidance www.oeapng.info

Hotel (and other) swimming pools

The visit leader should check the lifeguarding position in advance.

If lifeguarding arrangements are not provided at the pool then the visit leader will bear the full responsibility for ensuring swimming safety, and approval to lead the activity will be required via EVOLVE.

The following awards/qualifications apply:

For free swimming activity

A valid RLSS UK National Pool Lifeguard Qualification (NPLQ), or equivalent in the country visited - see www.lifesavers.org.uk

For structured or programmed activity^[SEP]

A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or

equivalent - see www.lifesavers.org.uk ^[SEP] or ^[SEP] A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement.

- see www.lifesavers.org.uk

The role of the lifeguard is:

- To directly supervise the pool and the pool users, exercising appropriate levels of control. (Note: the lifeguard should remain on the poolside at all times except in the case of an emergency)
- If necessary, brief pool users in advance regarding rules (e.g. no diving, running, etc.).
- To communicate effectively with pool users.
- To anticipate problems and prevent accidents.
- To intervene to prevent behaviour which is unsafe.
- To carry out a rescue from the water.
- To give immediate first aid to any casualty.

The above must be accomplished in the context of the normal operating procedures and the emergency plan for the pool, which should be considered before swimming takes place. Full familiarisation of the systems described should be walked through at the pool. Staff must be aware of the procedures in the event of an emergency, and who at the venue will provide back up. Staff should also know if they have exclusive use of the pool, as other pool users may increase the supervision role of your lifeguard. If a young person holds an appropriate qualification then their role should be emergency lifeguard action, and supervision should remain the responsibility of the establishment's staff.

Refer to: 'Swimming in a Swimming Pool' in National Guidance www.oeapng.info

Open water swimming (ie not in a swimming pool and not a 'water-margin' activity) LA Approval is required via EVOLVE. Particular consideration should be given to the following factors: - Unknown locations and hazards, especially overseas - Changing environmental conditions - Supervisor complacency - Adherence to local advice - Preparation and knowledge of young people, ie. is it a planned activity? The designated lifeguard must be dedicated exclusively to the group, and the location used must fall within the RNLI/RLSS definition of a 'safer bathing area'. Local advice must always be sought. For free swimming activity - A valid National Beach Lifeguard Qualification (NBLQ) or equivalent in the country visited, see www.lifesavers.org.uk Note: this is for beach/sea only, not inland water. *or* For structured or programmed activity

- A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRSTAC) or equivalent - see www.lifesavers.org.uk *or*
- A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement. (available from 2013) see www.lifesavers.org.uk
- Refer to 'Natural Water Bathing' in National Guidance www.oeapng.info

Water-Margin Activities

This section applies to:

Activities that take place near or in water – such as a walk along a riverbank or seashore, collecting samples from ponds and streams, or paddling or walking in gentle, shallow water*. It does not apply to swimming and other activities that require water safety or rescue qualifications and equipment, or water-going craft.

* 'gentle' means hardly moving at all. 'shallow' typically means up to the knees of the participants.

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

At the outset the leader must decide whether the activity:

a) Falls **within** the definition in bold above - in which case the below guidance applies,

or

b) **Exceeds** the definition in bold above - in which case this is a water-based adventurous activity and the below section 'Water-based Activities' applies.

All staff involved in water-margin activities should be conversant with the guidance contained within *Group Safety at Water Margins*. This document must be made available to all supervising adults in advance of the visit and can be found in Evolve resources.

As with all visits, where appropriate there should be an approved alternative 'Plan B' that could be used where conditions dictate, and for which parental consent has been obtained if necessary.

The leader must have previous relevant experience, and must have been assessed as competent to lead the activity by the EVC and/or **Head**.

Refer to 'Natural Water Bathing' in National Guidance www.oeapng.info

Water-Based Activities

For clarification between water-margin and water-based activities see above section

Westonbirt School acknowledges the immense educational benefits that water-based activities can potentially bring to young people, and fully supports and encourages water-based activities that are correctly planned, managed, and conducted.

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

The following are not regarded as adventurous activities for the purposes of approval:

- Swimming in publicly lifeguarded pools
- Water-margin activities
- Commercial craft, tourist boat trips, and similar activities for which young people would not normally wear personal buoyancy. With the exception of the above, all other forms of water-



based activities are regarded as adventurous activities, and as such require the appropriate approval. The responsibility for the safety of participants in an adventurous activity will rest with either:

- a. **An external provider** - The provider must hold an *LOtC Quality Badge* or complete a *Provider Form*

Note: If a Provider holds an *AALA licence* (and/or any other accreditation) but not an *LOtC Quality Badge*, then a *Provider Form* is still required. Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

or

- b. **A member of your establishment's staff** - This person must be specifically approved by the EVC and Head to lead the activity, via EVOLVE.

In order to participate in water-based activities, participants should normally be water confident. Participants who lack water confidence may still be able to take part subject to consideration of all factors, including the activity itself and supervision arrangements. The level of water confidence of all participants must be known by the activity leader prior to the commencement of water-based activities.

Leaders should have knowledge of the water conditions/hazards (and potential changes) that might be encountered and prepare accordingly. Local advice must be sought where appropriate, e.g. coastguard, harbour master, other site users, etc.

Personal buoyancy conforming to the appropriate National Governing Body must be worn at all times by all participants in water-based activities, except, at the discretion of the activity leader, where the activity:

- a) takes place in a swimming pool, **or**
- b) is 'swimming', **or**
- c) is an activity for which personal buoyancy would not normally be worn by young people.

Alcohol

'All staff who work in schools set examples of behaviour and conduct which may be used as a model by other staff and by pupils. All staff must, therefore, demonstrate the highest standards of conduct. All

staff must also avoid behaving in a way that risks giving rise to allegations of abusive or unprofessional conduct.' (Staff code of conduct)

Staff supervising pupils either directly, indirectly or remotely on residential, overseas trips or for risky activities should ensure that they are capable to respond to any reasonable eventuality. This means that they should refrain from drinking whilst on duty. Staff not on duty or staff taking students on non-residential, non-risky activities (such as attendance to a local musical concert) who are not required to drive or respond to emergencies should ensure that their behaviour and conduct falls in line with the staff code of conduct (see link above).

Students should only be allowed alcohol in line with the school's policy. It may be acceptable for students of age 18 and above to have a supervised glass of wine or beer at an evening function and for students of age 16 and above to have one or two supervised glasses of wine or beer with a meal at the end of the day. Alcohol should not be consumed before engaging in any educational/risky activity.

Misuse of alcohol either by staff or pupils will be dealt with in line with the school's usual disciplinary procedures. In extreme cases, a pupil may be recalled early from the trip/visit.

Using an External Provider

An 'External Provider' is defined as where there is an element of instruction, staffing, or guiding, for example:

- Activity Centre - Ski Company - Educational Tour Operator - Overseas Expedition Provider - Climbing Wall where instruction is provided by climbing wall staff - Freelance instructor of adventurous activities - Youth Hostel (where instruction is provided) - Voluntary organisation (e.g. Scout Association), where instruction is provided

For the purposes of this policy, an External Provider is NOT a: - Youth Hostel (where accommodation only is used) - Hotel, B&B, etc - Campsite

- Museums, galleries, etc - Tourist attractions - Theme Parks - Farms

- Coach, Train, or Airline company - Swimming Pool - Climbing Wall where instruction is provided by a member of St John's School staff with an approved Activity Leader Form (ALF) - 'Volunteer' instructor of adventurous activities (see below)

The decision about the use of an external provider is the responsibility of the visit leader, EVC, and **Head**.

Visit Leaders should consider the requirements under 'best value' when selecting an external provider.

To confirm that all aspects of the operation of the provider are satisfactory, the Visit Leader must ensure that either:

- a) The Provider holds an LOtC Quality Badge www.lotcqualitybadge.org.uk or www.kaddi.com
or ^[11]_{SEP}
- b) A Provider Form has been satisfactorily completed by the provider ^[11]_{SEP} Note: If a Provider holds an AALA licence (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required. ^[11]_{SEP}

Note: EVOLVE will automatically identify providers that hold an LOtC Quality Badge, via the search tool Kaddi www.kaddi.com

For Providers that hold an LOtC Quality Badge www.lotcqualitybadge.org.uk or www.kaddi.com No further action is necessary, other than to check the suitability of the provider/venue in relation to the intended aims or learning outcomes for the particular group.

For Providers that do not hold an LOtC Quality Badge or www.kaddi.com

PROCEDURE

www.lotcqualitybadge.org.uk

- Download a Provider Form from EVOLVE.
- Complete the top section. ^[11]_{SEP}
- Send Provider Form to the provider ^[11]_{SEP} On its return, check that it has been satisfactorily completed.
- Keep Provider Form on file together with all other relevant documentation.

Important: If the Provider has made any alterations to the wording of the Provider Form or is unable to comply, then you must discuss this with the Provider, and if necessary seek advice from the EVC prior to making a commitment with the Provider.

The Provider Form should be sent to the provider at the time of making a provisional booking and no deposits should be committed prior to its satisfactory completion and return.



The satisfactory completion of a Provider Form does not necessarily signify that the service on offer will be appropriate for the young people from your establishment. A pre-visit and recommendation from previous users will help you decide on its suitability.

In some instances, for example where a visit leader intends to use an 'external', **voluntary** individual for services, then this person may be regarded as a temporary member of staff and the procedure outlined in 'Approval of staff to lead and adventurous activity' may be appropriate.

The above procedure is **not** sufficient for Overseas Expeditions (ie. those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable and **must** be complied with, see 'Overseas Expeditions.'

Appendix – Visits Checklist

The questions below form part of the risk management process for educational visits. Any visit should only go ahead if the answer to all relevant questions is 'YES'. This checklist can be used as a tool or aide-memoire to assist the visit leader in the planning process, although alternative approaches to considering the relevant issues are equally as valid.

In advance of the visit:

1. Have the intended outcomes of the visit been clearly identified?
2. Is the visit appropriate to the age, ability and aptitude of the group?
3. Has there been suitable progression/preparation for participants prior to the visit?
4. Does the visit comply with any guidelines specific to Westonbirt School?
5. Does the visit comply with any specific school guidelines? (see relevant sections)
6. If a member of staff is going to lead an adventurous activity, have they been 'approved' by the EVC?
7. Are transport arrangements suitable and satisfactory?
8. If residential, have appropriate measures been taken to ensure the suitability of accommodation?

9. If the visit is overseas, have appropriate additional measures been taken to ensure the suitability of activity and safety of participants?
10. Has a pre-visit taken place? (normal procedure for most visits within the UK). If not, have appropriate additional checks been made?
11. Do the adults in the party have the appropriate skills for the visit? (Check this carefully and arrange suitable training and/or briefing to clarify your expectations).
12. Have any adult helpers (non employees) been approved by the Designated Safeguarding Lead as to their suitability?
13. Is the level of staffing sufficient for there to be an appropriate level of supervision at all times?
14. Does the Visit Leader possess the necessary competence to lead the visit, and is he/she comfortable with their role?
15. Are all support staff aware of and comfortable with their roles?
16. Are all helpers aware of and comfortable with their roles?
17. If appropriate, have Event Specific Notes (ESN) been made and will these be shared with all relevant parties?
18. Does at least one member of staff know the participants that are being taken away, including any behavioural traits?
19. Have participants been advised in advance about expectations for their behaviour? If appropriate, are participants aware of any 'rules', and have sanctions to curb unacceptable behaviour been identified and agreed with participants and staff?
20. Are participants aware of the nature and purpose of the visit?
21. Are parents fully aware of the nature (including contingency plans), and purpose of the visit, and has consent been obtained?
22. Have all relevant details been issued? (eg. itinerary, kit lists, etc?)
23. Are staff aware of any medical needs and/or other relevant details of participants?
24. Has parental consent been gained for staff to administer specific drugs/injections, and if necessary have named staff received appropriate training?
25. Are staff aware of any relevant medical conditions of other staff/helpers within the group?

26. Does at least one responsible adult have a 'good working knowledge' of First Aid appropriate to the environment?
27. Is a first aid kit (appropriate to the visit) available?
28. Is there flexibility within the programme? Are there contingency plans that would be suitable in the event of changed or changing conditions, staff illness, etc. eg. 'Plan B', and have these plans been risk assessed and parental consent been obtained?
29. For journeys taking place outside the establishment's 'normal' hours, will an Emergency Card (Visit Leader) be with the leader, and an Emergency Card (Home Contacts) be with the designated home contacts?
30. Are full details of the visit at the school, or recorded on EVOLVE, and if appropriate with the establishment's Emergency Contact(s)?
31. Are staff aware of the appropriate action to be taken in the event of accident, incident or emergency?
32. Is a weather forecast and/or other local information necessary, and are staff able to access this information and act upon it appropriately if necessary?
33. If undertaking water-margin activities, has a copy of 'Group Safety at Water-Margins' been made available to all supervising staff in advance of the visit?
34. A mobile phone is recommended for all visits. Are you aware of the reception in the area you are visiting?
35. Will the group need waterproof clothing, boots or other equipment? If so, are procedures in place for checking the suitability of equipment?
36. Does any specialist equipment conform to the standards recommended by responsible agencies?
37. Have all financial matters been dealt with appropriately?
38. Has the visit been approved via EVOLVE, and in line with the School's policy?
39. If residential, overseas, or involving adventurous activities, has the visit been commented on by the EVC?

During the visit: -

40. Do all staff have a list of participants/groups? + emergency contact details and an Emergency Card (Visit Leader) if out of the establishment's normal hours?
41. Does the School office have a list of the names of all participants, including adults? and if out of hours, does the home contact have these details and an Emergency Card (Home Contact)?
42. Do staff have sufficient funds to allow for any contingencies?
43. Do staff have any relevant literature, work sheets, clipboards, etc?
44. Do staff have other items, eg. first aid kit, + sick bags, litter sack, etc., if needed?
45. Are participant numbers being checked at appropriate times?
46. Has the group been warned of potential hazards in advance? If necessary, have specific arrangements been made to supervise these areas particularly carefully?
47. Are participants aware of the procedure in areas where there is traffic? (eg. if walking, is it pairs, crocodile, groups? - may participants run? - are participants aware of the procedure at road crossings? etc.)
48. Has a clear recall system been arranged if the group is working away from you? Do participants understand this and will they be able to respond effectively?
49. If a rendezvous for the group has been arranged after a period of time, does each participant and member of staff know exactly where and when to meet?
50. Do participants know what action they should take if they become separated from the group?
51. Is on-going risk assessment being conducted, and if necessary the programme adapted to suit changed or changing circumstances (Plan B)?

At the end of the visit: -

52. Are appropriate arrangements in force for the dismissal of participants?
53. Has the Visit Leader reported back to the Educational Visits Coordinator?
54. Has the group been de-briefed and any relevant follow-up work completed?
55. Have all loose ends been tied up, e.g. paperwork, finance, thank you letters, etc?
56. Has the visit been evaluated, and if appropriate have notes been made of points to be considered for future visits?
57. Have all staff and helpers involved in the visit been thanked for their input



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