



**The Highland
Council
Comhairle na
Gàidhealtachd**

**Highland Council Education, Culture and Sport
Service**

**Procedures and Guidance for
Conducting**

All off-site excursions

Slàinte & Sàbhailteachd airson Cuirtean Làraich Uile

Foreword

Off-Site Excursions play an important role re the delivery of the [Curriculum for Excellence through Outdoor Learning](#).

The Curriculum for Excellence recognises that learning is embedded in experience. By taking learning outdoors we remove the barriers that the traditional classroom can put up between young people and first-hand, real-life experiences. Outdoor learning is hands-on and direct, and the knowledge that pupils gain from it is real, first-hand and unforgettable, be it through a visit to another establishment, a trip to the local park, an adventurous activity or a trip to a foreign country.

Our Service, Education Culture and Sport, greatly values these opportunities created by its staff to enrich the educational and life experiences of children and young people within the Highlands

Off site excursions present the leader with a vehicle to further enthuse, excite and educate their charges.

In the delivery of Off Site Excursions, as it has in all situations, the Council has obligations to meet the requirements of the Equality Act. As a public body it is our duty to promote and encourage equal opportunities in addition to tackling unlawful discrimination.

Operating outwith the premises of normal work, (where the hazards are well known and the risks are managed to an acceptable level), presents each leader with the need to assess the safety of the excursion with regard to the health of;

1. The participants
2. Other supervisors
3. The general public

It is a legal requirement that a 'risk assessment' is carried out.

This basically means that the leader has to be aware of the hazards associated with the excursion (that they are responsible for controlling) and manage the risk of these hazards affecting the group and the general public.

There are generic, excursion and dynamic risk assessments associated with all excursions.

This document will assist all those involved with off-site excursions to fulfil their responsibilities.

Contents

Foreword	2
Contents	3
Use of this document	6
Introduction	7
How often do I need to record our visits in EVOLVE?	8
How often do I need to create/review a new excursion risk assessment form?	8
What activities are regarded as Adventurous Activities?	9
1 Responsibilities for Excursions	12
Legal framework	12
Approval for excursions	13
Flow Chart	14
Head of Establishment	15
Group leader	15
Teachers	15
Adult volunteers	15
Responsibilities of participants	16
Parents	16
2 Planning excursions	17
Risk assessment	17
Excursion/site specific risk assessments	20
Exploratory visit	26
Other considerations	26
Financial planning	27
Charging for excursions	27
Children with additional needs	27
Participants with additional support needs	29
First aid	29
Highland Council's policy and guidance	30
Providing an Adventurous Activity and First Aid	30
General	30
Planning the excursion	31
3 Supervision	33
Ratios	33
Parents/Volunteers	33
Vetting suitability - Disclosure Scotland	34
Supervisors' responsibilities	34
Competences if leading an adventure activity	34
Head counts	35
Remote supervision (unaccompanied but remotely supervised)	35
Unsupervised excursions (unaccompanied and unsupervised)	36
4 Preparing participants for excursions	38
General	38
Participation	38
Equal opportunities	38
Information to participants	38
Preparing participants for remote supervision	40
Transport and participants	40

	Participants with medical needs	41
	Participants with additional support needs	42
5	Communicating with Parents.....	43
	Information to Parents	44
	Parental consent.....	45
	Medical consent.....	46
	Other consent.....	46
	Early return	46
	Participants' contact with parents	46
6	Planning Transport	47
	General cross reference	47
	Legislation	47
	Supervision on transport.....	47
	Vetting non-staff drivers.....	49
	Hiring coaches and buses	49
	Additional information relevant to coach trips	49
	Licences and Permits	50
	Establishment minibus driver.....	50
	Maintenance and checks of establishment minibuses	51
	Private cars.....	51
	Further Information re transport.....	52
7	Insurance.....	53
	General.....	53
	Additional Insurance	53
	Insurance cover for excursions.....	54
	Cancellations	54
	Transport.....	54
8	Types of excursion	55
	Home Stays (Exchange Visits)	55
	Vetting Highland Host Accommodation	55
	Vetting reciprocal host accommodation.....	57
	Adventure activities using licensed providers	57
	Adventure activities using non-licensed providers	58
	Establishment-led adventure activities	58
	Employment of providers of adventure activities	58
	Remote supervision during adventurous activities.....	58
	Coastal excursions	58
	Swimming in the sea or other natural waters.....	58
	Swimming and paddling pools.....	59
	Farm excursions	60
	Field studies	60
	Residential excursions.....	60
9	Excursions abroad.....	62
	General.....	62
	Organising your own excursion	62
	Organising your own transport.....	62
	Using a Tour Operator	63
	Operators based abroad.....	63
	Planning and preparation	63
	Staffing the excursion	64

Preparing participants for excursions abroad	64
Briefing meeting for parents	64
Vaccinations	65
Insurance.....	65
Foreign legislation	65
Language abilities.....	65
Visas/passports	65
Nationality.....	65
Looked after children	66
Emergency Medical Facilities	66
Paperwork	66
Emergencies.....	68
Contacts at home	68
Travel by air.....	68
Exchange excursions in the UK or abroad	68
10 Emergency Procedures	70
School Trips.....	70
Accident Reporting and Investigation	71
Response to an Emergency during Office Hours.....	72
Response to an Emergency out with Office Hours	73
11 Further Reading	74
12 Example forms for Educational Excursions	78
An example of an excursion checklist.....	80
Heads of Establishments' checklist for excursions	81
Group Leader's checklist for excursions - general	82
Group Leader's checklist for excursions – day or part day.....	83
Checklist for children and young people attending excursions.....	84
Consent form/Checklist for Parents of children and young people attending excursions.....	85
An example of a school excursion consent form	86
An example of a parental consent form for an extended excursion	87
An example of a Health & Medical consent form.....	88
An example of the instructions, provided by a parent, for the long and or short term administration of medicines.	89
An example of an Allergy Information request	90
An example letter following receipt of an incomplete health & medical consent form.....	91
An example of a pupil and parent agreement - for a school excursion to Russia.....	92
Sample letter for the host family (Home Stays)	93
Sample pledge for a host family (Home Stays).....	94
An example of Contingency Planning for a local school excursion	95
An example of a contingency plan for a local school excursion.....	96
An example of a contingency plan for an extended excursion	98
An example of how to deal with an emergency on an extended excursion ..	99
An example of an excursion Evaluation Form	101

Use of this document

This document has been designed with hyperlinks to enable the reader to quickly move to useful documents on the web or within this document for further information.

Each heading in the list of contents will take you directly to the section of the document you are interested in by placing your mouse over the words and clicking.

Likewise throughout the document there are hyperlinks which are coloured blue, by clicking the word you will be taken to another page in this document or to a web page.

Make sure you have the 'Web' toolbar on your screen, so you can navigate from the 'hyperlinked' page back to where you were previously in the document.

Highland Council is hopeful that you will not need to print off this whole document for a number of reasons;

1. To save cost re the use of paper
2. To save on printing costs
3. To save on distribution costs
4. To ease the process of updating the document

If you need to print this document;

1. Limit what you print to the section you are interested in
2. Set the printer so it prints on both sides of the paper
3. Change the printer settings to 'low print / draft' quality

Highland Council intends to keep this document up to date, especially the links to other sources of information on the web.

If you print off this document you will reduce your chances of working with a current document, and of course you will not be able to access the links easily.

It is best if you keep a link to this document in your 'Favourites', which will then take you directly to where it is stored.

If you save a copy to your computer, you will not have an up to date copy eventually.

It is important that during the use of these procedures and guidelines any non functioning links and out of date guidance from your perspective is reported to outdoor.ed@highland.gov.uk

Introduction

1. A good deal of educational and experiential benefit can be derived from taking part in off site excursions. Such excursions present the opportunity to undergo experiences not available in the classroom/establishment. Excursions help to develop investigative skills and longer excursions in particular encourage greater independence. This document is designed to help Heads of Establishments, group leaders and others to ensure that participants stay safe and healthy on educational excursions;
 - a. The guidance uses the terms “**establishments**”, “**participants**” and “**Heads of Establishments**” instead of “**schools**”, “**pupils**” and “**headteachers**”
 - b. The term ‘**excursions**’ is used hereafter to mean all activities which take place outwith all Highland Council establishments
 - c. The term ‘**leaders**’ is used hereafter to mean all staff, school teachers, lecturers, youth and social workers etc. involved in taking or supervising excursions
 - d. References to **leaders** could include instructors, administrative staff and support staff
 - e. References to **parents** are used hereafter to mean parents, carers or guardians
 - f. The term ‘**base**’ is used to mean school, youth centre or any other establishment from which an off site excursion is organised.
2. Most excursions take place without incident and it is clear that leaders are already demonstrating a high level of safety awareness. Following a number of tragic incidents involving schoolchildren in the last few years, e.g. [Glenridding](#), there is a growing concern amongst leaders and parents about further ensuring the safety of children, students and young people on excursions. This document has been produced in response to that concern. The potential hazards referred to should not discourage leaders. No amount of planning can guarantee that an excursion will be totally incident free, but good planning and attention to safety measures can reduce the number of accidents and help to lessen the seriousness of those that do happen. The management of health and safety on excursions is part of the overall Highland Council policy on health and safety. This document sets out principles, rather than trying to cover every eventuality, leaving it to leaders’ professional and local judgement how to apply those principles.
3. This document provides guidance and sets out procedures which leaders are required to follow in relation to the management and organisation of excursions. It should not be taken as an authoritative interpretation of the law. That is for the Courts.
4. All ‘Off Site Excursions’ should be recorded and authorised prior to taking place. Highland Council uses a web based recording system called EVOLVE to achieve the above. Please log onto www.highland-council-excursions.org.uk to create a ‘visit’ form,
5. There are several ‘Example Forms’ provided in chapter 12. Currently, these are not standard forms that you must use. You are free to create your own or copy the example forms. These example forms are not available as downloads.
6. To help in identifying whether or not the activities proposed as part of your

excursion are regarded as 'Adventurous Activities' and therefore should be recorded as such when creating a visit form in EVOLVE, please [consult this page](#).

7. Further information about Adventurous Activities can be found in [Highland Council's Outdoor Education Safety Document](#).
8. The guidance and procedures within this document are based on several other publications which include;
 - a. [Health and Safety of Pupils on Educational Excursions \(HASPEV\)](#)
 - b. [HASPEV update April 2006](#)
 - c. [Health and Safety on Educational Excursions](#), the Scottish version of the above
 - d. [Health and Safety: Responsibilities and Powers](#)

How often do I need to record our visits in EVOLVE?

1. Once a year for regular excursions such as
 - a. Going from the school to the local village hall just down the road
2. Once a term for seasonal fixtures such as
 - a. Traveling to different football grounds to play interschool matches
3. Once a term for an educational programme such as
 - a. An Outdoor Education day provided once a week by a school
4. For each trip for all other situations
5. If you are in doubt, please discuss your proposed excursion with the Outdoor Education Service outdoor.ed@highland.gov.uk

How often do I need to create/review a new excursion risk assessment form?

1. A new excursion risk assessment should be compiled and uploaded to each EVOLVE visit form you are creating.
2. An existing excursion risk assessment that has been uploaded to an EVOLVE visit form, created for a full term of activity e.g. regular football team excursions on a Saturday should be reviewed when any of the following occur,
 - a. When a new participant joins the team
 - b. When something happened that was not foreseen and warrants being added to the excursion risk assessment
 - c. At the end of the period it was designed for / prior to being used as an updated version next term
 - d. When a new member of staff / volunteer joins the supervisory team
 - e. Etc

Excursion Documentation Timelines

Type of Excursion	Initial Approvals	Final Approval From	Last Submission Date to the Final Approver
All Foreign 'Home Stay' Excursions	1. Head T 2. Area Manager	Head of Service	20 working days prior to the start of the trip
All Foreign 'Home Stay' Excursions including Adventurous Activities	1. Head T 2. Outdoor Ed 3. Area Manager	Head of Service	20 working days prior to the start of the trip
All UK 'Home Stay' Excursions including Adventurous Activities	1. Head T 2. Outdoor Ed 3. Area Manager	Head of Service	20 working days prior to the start of the trip
All UK 'Home Stay' Excursions	1. Head T 2. Area Manager	Head of Service	20 working days prior to the start of the trip
Residential Excursions Abroad	1. Head T	Area Manager	20 working days prior to the start of the trip
Residential Excursions Abroad including Adventurous Activities	1. Head T 2. Outdoor Ed	Area Manager,	20 working days prior to the start of the trip
UK Residential Excursions		Head of Establishment	10 working days prior to the start of the trip
UK Residential Excursions including Adventurous Activities	1. Outdoor Ed	Head of Establishment	10 working days prior to the start of the trip
All non-residential Off-site Excursions including Adventurous Activities	1. Outdoor Ed	Head of Establishment	10 working days prior to the start of the trip
All other Off-site Excursions		Head of Establishment	At the discretion of the Head of Establishment

What activities are regarded as Adventurous Activities?

Please refer to the table below; if the activity your are proposing is not listed below, but you still think it might be regarded as an adventurous activity, please contact the Outdoor Education Service to discuss. outdoor.ed@highland.gov.uk

Climbing		
Abseiling	Ariel Runway Improvised Tyrolean Traverses	Bridge Swings
Canyoning		
Coasteering	Adventure Swimming	
Gorge Scrambling	Adventure Walking Gorge Descending River Running Stream Walks	Ghyll Scrambling Gorge Walking Rock Hopping
Ice Climbing		
Rock Climbing	Bouldering Bridgeering Weaselling	Bridge Exercises Rock Hopping
Sea Level Traversing	Coastal Scrambling Rock Hopping	Coastal Traversing
Tyrolean Traverse	River/Gorge Crossings	
Trekking		
Camping		
Hill Walking & Mountaineering	Field work Navigation Exercises Snowshoeing	Mountain Scrambling Scrambling Unaccompanied Expeditions
Off-Road Cycling	Mountain Biking	
Orienteering		
Pony Trekking	Riding Courses	Trail Riding
Ski Touring	Nordic Skiing	
Snow Boarding		
Caving		
Caving	Weaselling	
Mine Exploration		
Pot Holing		
Watersports		
Bell Boating		
Dragon Boating		
Hydro-Speed	Hydroboarding	
Improvised Rafting	Inner Tubing	Rafted Open Canoes
Kayaking	Inflatables Sit on Tops Surf Kayaking	Rubber Boating Sit upon Kayaks Wave Skis
Kite Surfing		
Open Canoeing	Canoe Catamarans Inflatables Sit on Tops War Canoeing	Improvised Canoe Sailing Rafted Canoes Voyager Canoes
Paddle Surfing	Wave Skiing	

Rafting	Paddle Rafting	River Rafting
Rowing		
Sailing	Catamarans Dinghy Sailing Open Day Boats	Cruising under Sail Offshore Cruising Wildlife Cruises/excursions
White Water Rafting	Sit upon inflatable rafts	
Windsurfing		

1 Responsibilities for Excursions

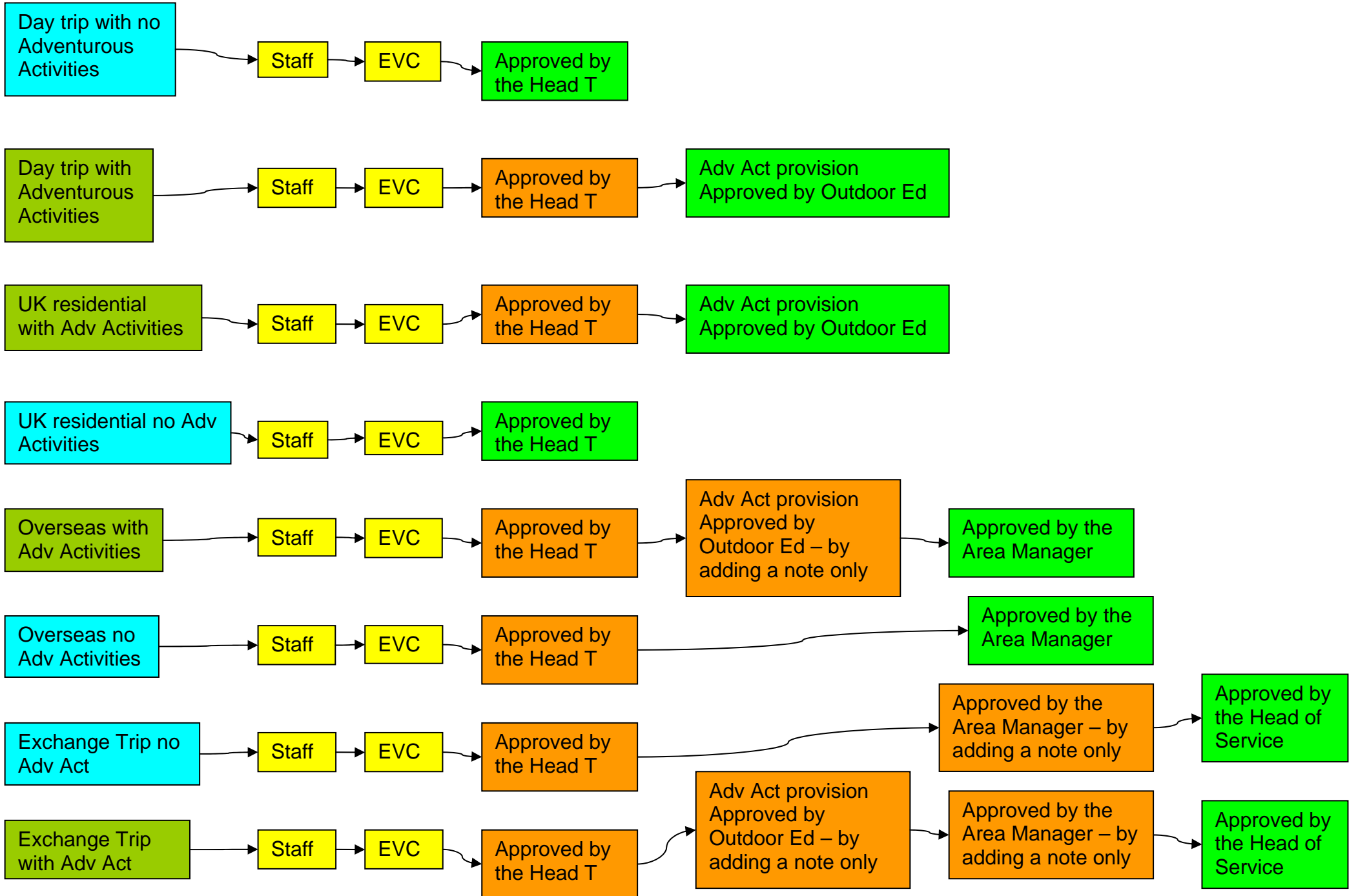
Legal framework

1. Under [Health and Safety at Work legislation](#), employers are responsible for the health, safety and welfare at work of their employees. Employers are also under a duty to ensure, so far as is reasonably practicable, the health and safety of anyone else on the premises or anyone who may be affected by their activities. This includes participants in off-site excursions.
2. **The employer in all excursions covered by this document is 'The Highland Council.'**
3. The Management of Health and Safety at Work Regulations 1999 (the Management Regulations) generally make more explicit what employers are required to do to manage health and safety under the Health and Safety at Work Act., for example;
 - a. assess the hazards associated with planned activities
 - b. introduce measures to manage these hazards and reduce the risks
 - c. tell their employees about these measures
 - d. also under Health and Safety legislation employees must
 - i. take reasonable care of their own and others' health and safety
 - ii. co-operate with their employers over safety matters
 - iii. carry out activities in accordance with training and instructions
 - iv. inform the employer of any serious risks
4. These duties apply to all excursions. Leaders and other staff in charge of participants also have a duty of care to act as any reasonably prudent parent would do in the same circumstances.
5. The Equality Act came into force in Oct 2010, a key document for educators to refer to is - [Equality Act guidance for education providers: Schools](#)

Approval for excursions

1. Although the employer is ultimately responsible for health and safety, decisions about excursions are usually delegated to the Head of Establishment. The Head of Establishment's agreement must be obtained before an excursion takes place. Where any doubt or difficulty arises, e.g. in the case of potentially adventurous activities, the matter should be referred to the Area Manager who will provide advice and support as appropriate to the situation.
2. The guidance and procedures in this document are designed to provide all Heads of Establishment with the tools to fulfil their role in following Health and Safety laws, regulations and duties, and as such they must have a written procedure for arranging all off site excursions which leaders must follow. This will include procedures for the approval of each different type of excursion, as outlined in the flow chart below.
3. **In the case of any excursion involving [home-stays](#) (including reciprocal excursions), the approval of the Service Director must be sought.**
4. Highland Council has the following main roles;
 - a. provide general advice and guidance on excursions through Area Managers
 - b. provide written guidelines for Heads of Establishments and leaders including advice and training on risk assessment e.g.
 - i. Health and Safety Executive's '[Five Steps to Risk Assessment](#)'
 - ii. Highland Council '[Guidance notes on Risk Assessment](#)'
 - iii. Highland Council '[Policy on Risk Assessment](#)'
 - iv. Highland Council '[Worked Example of an Excursion Risk Assessment](#)'
 - c. provide technical advice if required,
 - d. approve detailed proposals for certain types of excursion e.g. home-stays, potentially adventurous activities
 - e. provide 24 hour emergency telephone contact for the duration of the excursion, this will be the head of establishment or his/her nominee
 - f. ensure that training needs have been addressed and a training needs analysis has been carried out by a competent person taking into consideration all staff and participants involved in the excursion
 - g. provide access, if required, to named staff for advice; e.g.
 - i. Outdoor Education Officer, George Reid or Nancy Chambers outdoor.ed@highland.gov.uk
 - ii. Health and Safety Advisor andrew.mactaggart@highland.gov.uk
 - iii. Additional Support Needs Team Bernadette.cairns@highland.gov.uk
 - iv. Equalities Officer rosemary.mackinnon@highland.gov.uk
 - h. provide advice on, and make arrangements for, insurance cover (Ailsa Mackay – Insurance & Risk Manager Tel;01463 702414 Ailsa.Mackay@highland.gov.uk)
 - i. to assist with the process of obtaining Disclosure Scotland checks where required.

Flow Chart



Head of Establishment

1. Heads of Establishments must ensure that **excursions comply with regulations** and guidelines provided by the Council's health and safety policy.
2. Heads of Establishments must ensure that **the group leader is competent** to monitor the hazards and manage the risks (dynamic risk assessment) throughout the excursion.
3. Heads of Establishments should be clear about their role if taking part in the excursion as a group member/supervisor. They must follow the instructions of the group leader who will have sole charge of the excursion.
4. A [checklist](#) is provided in section 12, to assist Heads of Establishments with the process of fulfilling their duties in overseeing off site excursions.

Group leader

1. The group leader must have responsibility for the supervision and conduct of the excursion and must have regard to the overall health and safety of the group. The group leader must have been appointed or approved by the head of establishment.
2. A [checklist](#) is provided in section 12, to leaders with the process of fulfilling their duties in supervising off site excursions.

Teachers

1. Teachers on establishment led excursions act in their capacities as employees of the Council, whether the excursion takes place within normal hours or outside those hours.
2. Teachers must do their best to ensure the health and safety of everyone in the group and act as any reasonable parent would do in the same circumstances.
3. They must;
 - a. follow the instructions of the group leader and help with control and discipline
 - b. consider stopping the excursion or the activity, notifying the group leader, if they think the risk to the health or safety of the participants in their charge is unacceptable.

Adult volunteers

1. Adults on the excursion should be clear about their roles and responsibilities during the excursion.
2. Adults acting as supervisors must;
 - a. do their best to ensure the health and safety of everyone in the group
 - b. not be left in sole charge of participants except where it has been previously agreed as part of the risk assessment

- c. follow the instructions of the group leader and help with control and discipline
- d. speak to the group leader if concerned about the health or safety of participants at any time during the excursion.

Responsibilities of participants

1. The group leader should make it clear to every participant that they must at all times;
 - a. not take unnecessary risks
 - b. follow the instructions of the leader and other supervisors including those at the venue of the excursion
 - c. dress and behave sensibly and responsibly
 - d. if abroad be sensitive to local codes and customs
 - e. look out for anything that might hurt or threaten themselves or anyone in the group and tell the group leader or supervisor about it
2. Any participants whose behaviour may be considered to be a danger to themselves or to the group may be stopped from going on the excursion. The curricular aims of an excursion for such participants should be fulfilled in other ways wherever possible.

Parents

1. Parents must be able to make an informed decision on whether their child should go on the excursion. The group leader must ensure that parents are given sufficient information in writing (or in other media as appropriate) and are invited to any briefing and feedback sessions.
2. The group leader must also inform parents how they can help prepare their child for the excursion by, for example, reinforcing the code of conduct for the excursion. Parents should also be asked to agree the arrangements for sending a participant home early and, if necessary, who will meet the cost.
3. Special arrangements may be necessary for parents for whom English is a second language.
4. Parents must;
 - a. provide the group leader with emergency contact number(s)
 - b. sign the [consent form](#), there is an example in section 12
 - c. give the group leader known information about their child's emotional, psychological and physical health which might be relevant to the excursion (usually by means of the consent form)
5. Please refer to Section 5 [Communicating with Parents](#).

2 Planning excursions

1. Whether the excursion is to a local park, museum or swimming pool, or includes a residential stay in the UK or abroad, it is essential that formal planning takes place. This involves considering the dangers and difficulties which may arise and making plans to reduce them. In practice, the head of establishment - who is responsible for planning excursions - will often delegate the detailed planning to the organiser of the excursion or the group leader. Heads of Establishment must satisfy themselves that the person planning the excursion is competent to do so and has the necessary relevant experience. They must also provide appropriate support.

Risk assessment

1. To view Highland Councils 'Policy on Risk Assessment', click [here](#)
2. To view Highland Councils 'Guidance Notes on Risk Assessment, click [here](#)
3. In practice, risk assessments, which employers are legally required to carry out, are usually undertaken by the group leader. An assessment should be completed well before the excursion and should be approved by the head of establishment.
4. The risk assessment is an integral part of good planning. It is often the case that the circumstances of a particular excursion will not change from year to year and therefore it is possible to establish a bank of model risk management strategies and practical procedures.
5. Group leaders must carry out risk assessments based on;
 - a. the particular group
 - b. local circumstances
 - c. staff competencies
6. Heads of Establishment should review the appropriateness of model risk management strategies and procedures prior to their use. Specialised information for some excursions may be necessary, however, and Heads of Establishments must ensure that the person assessing the risks is competent and trained to do so. Training can be arranged by contacting Andrew MacTaggart the Health and Safety Advisor by email at Andrew.Mactaggart@highland.gov.uk
7. Safety must always be the prime consideration. A formal assessment of the hazards that could be met on an excursion should have the aim of managing the associated risks.
8. Group members must not be placed in situations which expose them to an unacceptable level of risk. If the risks cannot be managed within reason, then the excursion, as it stands, must not take place.
9. The '[5 Steps to Risk Assessment](#)' as produced by the HSE are as follows
 - a. identify the hazards
 - b. decide who might be harmed and how
 - c. evaluate the risks and decide whether the existing precautions are adequate or whether more should be done
 - d. record your findings and implement them
 - e. review your assessment and update if necessary

10. Staff compiling an excursion risk assessment should record their findings on the Highland Council [risk assessment form](#). The completed excursion risk assessment should be uploaded to the EVOLVE visit form. All staff on the excursion should have agreed that collectively they have identified the significant hazards and that the control measures are appropriate.
11. Frequent excursions to local venues such as swimming pools may not need an excursion risk assessment every time. Nevertheless, it is essential not to become complacent.
12. **Generic risk assessments** of the risks associated with excursions should be made at regular intervals (at least annually), and careful monitoring should take place. Some [generic risk assessments for adventurous activities](#) are available on the Off Site Excursion web pages. Other generic risk assessments are often available from governing bodies of sport. Where no generic risk assessment exists, one will have to be made prior to the excursion.
13. Where you are using an external provider, you are advised not to ask for a copy of their risk assessments as per the guidance provided by the [Adventure Activities Licensing Authority](#)
 - a. From; Collective Interpretation 1.19 Selecting and Vetting Adventure Activity Providers
 - i. The purpose will NOT generally be to:
 - ii. tell the provider how to operate. For example, instructing the provider to use the client's operating procedures may disrupt and detract from an existing safe and successful operation
 - iii. transfer responsibility from the provider onto the client. For example, requesting copies of operating procedures or risk assessments may be interpreted as accepting them, with a corresponding liability if something goes wrong. It is good practice to seek details of their safety management practices. The Licensing Authority believes that seeking details does not mean requesting copies. Obtaining assurances that they exist and discussing relevant aspects would, we believe, satisfy this.
 - b. From; Collective Interpretation 1.17 - A Risk Management Summary
 - i. The Licensing Authority believes that seeking details does not necessarily mean requesting copies. Obtaining assurances that they exist would, we believe, satisfy this. Moreover, we believe is unnecessary in most cases, and positively ill-advised in others, to actually request copies.
 - ii. For licensable activities we believe there is no need to request details of safety management systems for licensable activities offered by a licensed provider. Page 9/10 paragraph 20 of the same HSPV Supplement 1 states "centres licensed under the licensing regulations can be considered safe in the leading, instructing and equipping of the activities stipulated on the licence" and goes on "LEA's have no need to risk assess that part of any visit."
 - iii. But;
 - iv. **The Licensing Authority will NOT generally consider, for example,**
 1. Sleeping Accommodation
 2. Eating Arrangements
 3. Fire Safety
 4. Night Security
 5. Vehicle Safety
 6. Etc.
 - v. It is the responsibility of the client to satisfy themselves on these and similar issues.
14. The group leader and other supervisors must monitor the risks throughout the excursion (**dynamic risk assessment**) and take appropriate action as necessary. Dynamic risk assessments are not written down.
15. The group leader must take the following factors into consideration when assessing the risks for any excursion;

- a. the type of excursion/activity and the level at which it is being undertaken
- b. the location, routes and modes of transport
- c. the competence, experience and qualifications of supervisory staff
- d. the ratios of supervisory staff to participants
- e. the group members' age, competence, fitness and temperament
- f. the suitability of the activity
- g. the special educational or medical needs of participants
- h. the quality and suitability of available equipment
- i. seasonal conditions, weather and timing
- j. emergency procedures
- k. how to cope when a participant becomes unable or unwilling to continue
- l. the need to monitor the risks throughout the excursion

Excursion/site specific risk assessments

In the Scottish Executives [‘Health and Safety on Educational Excursions’](#) we are guided toward making sure all Off Site Excursions are adequately risk assessed.

The excursion risk assessment should not be the sole task of one individual, indeed one member of staff might agree to start the process, but all the staff going on the excursion should agree that the **significant hazards** have been identified and that appropriate control measures are in place. Many see this process as a valuable planning exercise. Hence the excursion risk assessment is ‘compiled by’ a group of staff that are all going on the trip.

With regards risk assessments the HSE provide the following advice in their publication [‘5 steps to risk assessment’](#)

- “...focus on the **risks that really matter** in your workplace – the ones with the potential to cause real harm”

And within their publication the [‘Adventure Activity Licensing Regulations L77’](#)

- 14. The scope of the risk assessment should be sufficient to identify the significant (**non-trivial**) risks arising from the activity.

Creating an excursion risk assessment should not normally be a lengthy exercise, it is not the place for listing ‘situations’ that might arise that would be inconvenient or embarrassing for the adults responsible for the group.

Below are the topics to be considered for each excursion, which are considered as ‘variables’.

Medical needs of pupils

Behaviour of participants

Weather etc

Crossing roads, railways, rivers etc

Group management decisions

These must always appear in your ‘Excursion Risk Assessments’. Where no hazard is presented by a topic, leave the title in the 1st column, type below it ‘no hazard’ and then complete the rest of the row noting that no control measures are req’d.

In addition to these standard topics, site/excursion specific hazards should be added where they are not covered in a generic risk assessment that has been provided by Highland Council e.g. [Generic Risk Assessments for Adventurous Activities](#) or [Generic Risk Assessments for Team Sports](#).

There is no need to take information from the generic risk assessments and add it to your excursion risk assessment. For completeness you can upload a generic risk assessment to the visit form you create in [EVOLVE](#).

It is important to review the 'Excursion Risk Assessment' when changes to the excursion/series of excursions take place, for example if new participants join in the group, adjust the RA where req'd, e.g. the new participants might have behavioural needs that require the control measures to indicate a change in the ratio of staff to participants.

On the next page there is a worked example of an excursion risk assessment.

All staff should use this as a template for their own excursion risk assessment, by using 'File' 'Save As' and then deleting information under the topics that is not relevant and adding what is. Please do not use old templates.

It is better to have one row for each hazard as it makes it easier to keep the relevant information and numbers all in a line, more rows can easily be added by going to the toolbar at the top of the screen, select 'Table' 'Insert' 'Rows Above' or 'Rows Below'

The topic guidance notes in colour on the next page can be removed from your finished excursion risk assessment by using 'Table' 'Delete' 'Rows' if you so wish.

George Reid
Outdoor Education Officer
Dec 2010

Service: ECS	Description of the Off Site Excursion: Whole year group going to the Zoo		Compiled by: G Reid, E Whymper, R Smith			
HC Area: CSER	<h2 style="color: red;">Excursion Risk Assessment (Day trip)</h2>				Date/s of trip: Dec 12th 2010	
Name of Establishment: Everest High School	Click here for Highland Council's guidance notes re risk assessments. For training call Employee Development on 01463 703057	All RA's should be reviewed/updated when changes are made to the excursion, e.g. to group, staff, transport, ratios etc.			Date completed: 12 th Nov 2010	
STEP 1	STEP 2	STEP 3	STEP 4		STEP 5	
List potential Hazards here:	List groups of people at risk from hazards. Including those most vulnerable:	List existing control measures or note where information may be found:	Calculate the residual risk taking the presence and effectiveness of existing measures into account: Severity x Likelihood = Risk Rating		List further control measures necessary to reduce risk to an acceptable level <i>and</i> date of their proposed introduction:	
<p>Medical needs of pupils. Control measures include ensuring the group leader is aware of the known health problems of the group and the local authority policy on the administration of medicines to participants; sufficient medication is provided; there are sufficient adults competent in dealing with the medical problems in the group; and there are contingency measures in place for the group to be adequately supervised if an adult has to accompany a child to hospital</p>						
Medical <ul style="list-style-type: none"> Asthma attack 	2 Participants	<ul style="list-style-type: none"> R Smith will visually check that the individuals concerned have their inhalers prior to getting onto the bus 	2	1	2	
Medical <ul style="list-style-type: none"> Severe allergic reaction to peanuts 	1 Leader (RS)	<ul style="list-style-type: none"> A reminder to all parents was included in the parental consent letter that no peanuts, peanut butter etc should be taken as part of anybody's snack food / 	3	1	3	

		<p>packed lunch</p> <ul style="list-style-type: none"> • RS carries his 'epi' pen at all times and E Whympen can assist if required as he has been trained how to administer an 'epi' pen. 				
<p>Behaviour of participants. Control measures include a code of rules and behaviour, agreed as far as practicable with participants; rules for supervision (including model behaviour and example set by adults); and competence of supervisors to ensure disciplinary standards</p>						
<p>Behaviour</p> <ul style="list-style-type: none"> • Damage to other people's property • Inappropriate items given to the animals 	Public and wildlife	<ul style="list-style-type: none"> • The pupil with the potential to be disruptive and cause damage will be supervised on a 1:1 basis by GR • A general code of conduct has been discussed with the pupils during a 'responsible citizens' session 	1	1	1	
<p>Weather etc. Control measures include obtaining local intelligence of tides; potential for flooding or flash floods; likelihood of sudden weather changes in mountains; streams that can change from benign to torrents in a short time etc; planning the itinerary to take the possibility of change into account; suitable clothing; ensure participants understand the risks and the reasons for the control measures, and having a plan B pre-assessed in case plan A has become too hazardous</p>						
<p>Weather</p> <ul style="list-style-type: none"> • Mild hypothermia 	Participants and leaders	<ul style="list-style-type: none"> • All to be reminded to take a wind and waterproof jacket as well as warm clothing • A check prior to leaving will be made to see that the necessary clothing is taken by the leaders <ul style="list-style-type: none"> ○ RS group 1 ○ GR group 2 ○ EW group 3 	1	2	2	

Crossing roads, railways, rivers etc. Control measures include local intelligence; information on where the controlled or otherwise less dangerous crossing places are; ensuring appropriate levels of supervision and that participants are aware of, and comply with, rules						
Crossing Roads <ul style="list-style-type: none"> Being run over by a vehicle - A number of very busy roads have to be negotiated when walking to one of the venues 	Participants, leaders and third parties	<ul style="list-style-type: none"> The least hazardous route has been selected All participants have been made aware of the Highway Code and the Tales of the Road We will divide into sub groups when walking from the train station to the bus stop <ul style="list-style-type: none"> RS group 1 GR group 2 EW group 3 	3	1	3	
Group management decisions. Control measures include establishing meeting and collecting points; code of rules and behaviour agreements; cultural considerations such as dress codes, holy days; induction requirements for support staff etc.						
Group Management <ul style="list-style-type: none"> Losing a member of the group 	Pupils	<ul style="list-style-type: none"> Each member of staff has been allocated a group of pupils and will generally operate in these sub groups Meeting places have been identified for pupils to regroup at Times of when to regroup will be clearly given to the pupils During 'free time' pupils will be told to remain in groups of 3 	1	1	1	
Additional Topics. This is the place to add significant hazards that are not covered by the headings above or are not included in any of the generic risk assessments.						

Severe Illness <ul style="list-style-type: none"> • Contracting E Coli 	Pupils and staff	<ul style="list-style-type: none"> • Staff and pupils will be reminded to wash their hands prior to eating. 	2	1	2	
Animal Bite <ul style="list-style-type: none"> • Infection from a bite 	Pupils	<ul style="list-style-type: none"> • All pupils will be reminded not to push their fingers or hands through enclosure fences 	2	1	2	

Exploratory visit

1. In most cases, an exploratory visit should be made by any person who is to;
 - a. lead a group abroad
 - b. on a residential excursion
 - c. instruct or lead the group in an outdoor activity in a location that is not familiar to them.
2. Exceptions to this might include excursions undertaken under the auspices of a reputable tour operator (following consultation between the Head of Establishment, the Group Leader and the authority's main contact).
3. The purposes of an exploratory visit are to;
 - a. ensure at first hand that the venue is suitable to meet the aims and objectives of the excursion
 - b. obtain advice from the manager of the venue
 - c. assess potential hazards and the levels of associated risk
 - d. ensure that the venue can cater for the needs of all participants and supervisors in the group
4. In the last resort if an exploratory visit is not feasible then the group leader will need to consider how to complete an adequate assessment of the risks. A minimum measure would be to;
 - a. obtain specific information by letter from the venue
 - b. obtain information from other users who have recently undertaken the same off-site excursion (including their Risk Assessments)
 - c. obtain information from local organisations such as tourist boards.
5. Detailed advice on particular categories of excursions which carry specific risks is provided in Sections 8 [Types of Excursion](#) and 9 [Excursions Abroad](#).
6. Many excursions will be to the same location each year. As some factors will change from year to year, it is prudent to re-assess the risks each time, even where the excursion is led by the same group leader. It may be useful to evaluate each completed excursion and keep a record.

Other considerations

1. Other factors which should form part of the planning stage include;
 - a. the facilities/equipment the group will need to take on the excursion
 - b. the facilities/equipment to be provided at the venue
 - c. staff training needs
 - d. the designation of someone to record the details of the excursion and to carry accident forms etc
 - e. transport arrangements
 - f. insurance arrangements
 - g. information to the provider
 - h. communication arrangements
 - i. supervision ratios
 - j. contingency measures for enforced change of plan or late return
 - k. information to parents
 - l. preparing participants
 - m. emergency arrangements
 - n. arrangements for sending participants home early.
2. Further information and helpful checklists relating to these issues are provided in subsequent sections.

Financial planning

1. The group leader must ensure that parents have early written information about the costs of the excursion, how much will come from establishment funds, and how much each parent will be charged or asked to contribute. Parents should be given enough time to prepare financially for the excursion.
2. The head of establishment must ensure that banking arrangements are in place to separate the excursion's receipts within the establishment's funds.
3. The head of establishment/group leader should reach a pre-agreement with parents on whether any funds left surplus after the excursion will be returned to parents or retained for another excursion.

Charging for excursions

1. Because of legislation excursions which form part of a school curriculum must be free of cost to participants. This means that Heads of Establishments may not impose a charge on parents for any such excursion.
2. Heads of Establishment may however charge parents for;
 - a. board and lodging on any residential excursions
 - b. the full costs or a contribution, when any excursion is deemed to be an 'optional extra'.
3. Heads of Establishments should use discretion in deciding when charges should be abated in respect of any pupil or participants.
4. An optional extra: does not form part of the normal curriculum; is not part of a syllabus towards a national qualification; is not in scope of the statutory requirements relating to religious education.
5. A skiing holiday during a school vacation would be an optional extra.
6. Heads of Establishments should obtain the parents' agreement to meet the costs of an optional extra excursion before it is planned in detail.

Children with additional needs

1. The Disability Discrimination Act (DDA) makes it unlawful to discriminate against disabled people in their access to education. In addition, part 4 of the DDA outlines the specific duties on schools that prevent them from discriminating, without justification, against disabled pupils and prospective pupils, in all aspects of school life.
2. The DDA defines a disabled person as a person with "a physical or mental impairment which has a substantial and long- term adverse effect on his ability to carry out normal day-to-day activities."
3. It is important to remember that the principle behind this legislation is that wherever possible disabled people should have the same opportunities as non-disabled people in their access to all the different parts of school education.
4. Every aspect of school life is covered by the duties and therefore, schools and local education authorities must not discriminate:
 - a. in relation to admissions
 - b. in relation to education and associated services
 - c. by excluding a pupil
5. The DDA sets out the main disability duties discrimination duties that schools and local education authorities must adhere to

- a. The duty not to treat disabled people less favourably
 - b. The reasonable adjustments duty, which requires them to take reasonable steps to avoid putting, disabled pupils at a substantial disadvantage.
6. It is also worth noting that the reasonable adjustment duty does not require the responsible body to provide auxiliary aids and services or to make alterations to the physical features of the school.
7. It is the responsibility of head teachers/lead officers to identify what reasonable adjustments can be made to ensure the full participation of pupils with disabilities in school trips, excursions and events.
8. Further guidance can be found in Highland Council's [Equal Opportunities Policy](#).
9. The Highland Council Accessibility Strategy 2006-09 notes particular commitments under Section 2.3 Curricular access (page 11) and Curriculum accessibility (page 14).
10. The Disability Rights Commission '[Guide for schools \(Disability Discrimination Act 1995\) Scotland](#)' explains to teachers in Scotland what the Disability Discrimination Act (DDA) is, how to challenge any discrimination against disabled students in education under the DDA and what to do to prevent discrimination.
11. The Disability Rights Commission '[Guide for parents \(Disability Discrimination Act 1995\) Scotland](#)' explains to parents in Scotland how, if your child has a disability and has been discriminated against in education, you may be able to challenge this under the Disability Discrimination Act (DDA).
12. If a member of school staff has any concerns relating to the full and equal participation of pupils and whether this may be covered by the disability duties please refer to the Disability Rights Commission guidance. Advice can also be sought from the Council's [Equal Opportunities Officer](#)
13. For further information refer to the [Equalities and Human Rights Commission](#)
14. Additional safety measures to those already in place in establishments may be necessary to support participants with additional needs during excursions.
15. Arrangements for taking medication and ensuring sufficient supplies for residential excursions may be required.
16. All supervisors of groups must be aware of a participant's medical needs and any medical emergency procedures. [Consent forms](#) held by all leaders, containing details of each participant's needs and any other relevant information provided by parents, is one way of achieving this. If appropriate, a volunteer should be trained in administering medication, if they have not already been so trained, and should take responsibility in a medical emergency. If the participant's safety cannot be guaranteed, it may be appropriate to ask the parent or a care assistant to accompany a particular participant.
17. The group leader should discuss the participant's individual needs with the parents.
18. Parents should be asked to supply;
 - a. details of medical conditions
 - b. emergency contact numbers
 - c. the child's GP's name, address and phone number
 - d. information on whether the participant has spent a night away from home before and their ability to cope effectively
 - e. written details of any medication required (including instructions on dosage/times) and parental permission to administer
 - f. parental permission if the participant needs to administer their own medication or agreement for a volunteer to administer
 - g. information on any allergies/phobias
 - h. information on any special dietary requirements

- i. information on any toileting difficulties, special equipment or aids to daily living
 - j. special transport needs for participants who require help with mobility.
19. Enquiries should be made at an early stage about access and facilities for securing wheelchairs on transport and at residential centres etc, if appropriate. If ramps are not going to be available in certain places, the organiser may wish to arrange to take portable ramps. The group leader should at an early stage assess whether manual handling skills will be needed and, if so, whether training should be sought.
 20. All supervisors involved with the excursion should be given the opportunity to talk through any concerns they may have about their ability to support the participant. Extra help should be requested at the planning stage, if necessary, e.g. a care assistant.
 21. If supervisors are concerned about whether they can provide for a participant's safety or the safety of other participants on a trip because of a medical condition, they should seek general medical advice and may need to seek further advice and information from the participant's own doctor or parents.
 22. The group leader should check that the insurance policy covers staff and participants with pre-existing medical needs and conditions at the planning stage.

Participants with additional support needs

1. Please refer to the previous section '[Children with Additional Needs](#)' for guidance re equality issues including the Disability Discrimination Act.
2. Establishments should already be familiar with the nature of a participant's additional support needs. Any limitations or problems the participant may have should be taken into account at the planning stage and when carrying out the risk assessment. Off-site excursions may pose additional difficulties for a participant with ASN and the behaviour of some participants may prove challenging.
3. The following factors should be taken into consideration;
 - a. is the participant capable of taking part in and benefiting from the activity?
 - b. can the activity be adapted to enable the participant to participate at a suitable level?
 - c. will additional/different resources be necessary?
 - d. is the participant able to understand and follow instructions?
 - e. will additional supervision be necessary?
 - f. the necessity to ensure compliance with Disability Discrimination legislation.
4. It may be helpful to the participant if one of the supervisors already knows them well and appreciates their needs fully. The group leader should discuss the excursion with the parents of participants with ASN to ensure that suitable arrangements have been put in place to ensure their safety.

First aid

When leading an off-site excursion you will potentially have less support at hand when it comes to dealing with an incident.

If the incident takes place out of doors, the environment will more than likely be against you.

Therefore it is prudent to review your experience and where necessary attend further first aid training.

For further information please refer to our [First Aid](#) web page.

Highland Council's policy and guidance

Highland Councils Equal Opportunities Policy can be found on the [Equal Opportunities](#) web page.

To view Highland Councils 'Policy on First Aid', click [here](#)

To view Highland Councils 'Guidance for the Provision of First-Aid and First Aid Training', click [here](#)

For a list of providers of First Aid courses designed for providers of adventurous activities please visit Highland Councils' [Off Site Excursions](#) web site.

Providing an Adventurous Activity and First Aid

To provide most adventure activities, experience and holding a National governing Body award is the norm.

Most NGB's insist that prior to presenting yourself for assessment, and thereafter in the field you must have a current first aid certificate.

For example Mountain Leader Training UK writes the following;

First Aid is an essential skill and the assessment of the Awards requires a current first aid qualification. The minimum requirement is that such a course must involve at least two full days or sixteen hours of instruction and include an element of assessment. Candidates are further expected to undertake such additional elements of first aid training as are consistent with their work in wild and remote country, including emergency assistance and evacuation techniques. It is the responsibility of award holders and/or their employers to evaluate their likely work and the type of situations that they can reasonably expect to encounter and to maintain current appropriate first aid training and qualifications.

General

1. First aid should form part of the risk assessment.
2. Before undertaking any off-site activities the head of establishment or the group leader must assess what level of first aid might be needed.
3. For adventurous activities, excursions abroad or residential excursions it is essential for at least one of the group's adults to be a fully-trained first-aider.
4. All adults in the group should know how to contact the emergency services.
5. The minimum first-aid provision for an extended excursion is;
 - a. a suitably stocked, easily identified and easily available first-aid box
 - b. a suitable person appointed to be in charge of first-aid arrangements.
6. Other considerations when considering first-aid needs should include;
 - a. the numbers in the group and the nature of the activity
 - b. the likely injuries and how effective first aid would be
 - c. the distance to the nearest hospital.
7. First aid should be available and accessible at all times. The Health and Safety Executive recommends the following minimum contents for a travelling first aid kit where no special risk has been identified:
 - a. a leaflet giving general advice on first aid;

- b. six individually wrapped sterile adhesive dressings;
 - c. one large sterile unmedicated wound dressing approximately 18 cm x 18 cm;
 - d. two triangular bandages;
 - e. two safety pins;
 - f. individually wrapped moist cleaning wipes;
 - g. one pair of disposable gloves;
 - h. a resuscitator (for hygienic mouth to mouth resuscitation) would also be useful.
8. All minibuses are required by law to carry a first-aid kit; refer to Section 6 [Planning Transport](#).
9. For further advice on first aid at work visit the [HSE web site](#)

Planning the excursion

1. Outline plan
 - a. Excursion's objectives
 - b. Likely date, duration, venue.
 - c. Participant group, staffing.
 - d. Resources, estimate of costs.
 - e. Proposals for longer excursions may need to be made well in advance, for establishments this may well be before the start of the relevant academic year.
2. General Planning
 - a. Contact venue.
 - b. Is it suitable for the group?
 - c. What are the transport options?
 - d. Who would lead the group and who would help to supervise it?
 - e. Who would pay for the excursion?
 - f. Excursion risk assessment.
 - g. Exploratory visit.
3. Proposal to Head of Establishment
 - a. Details of dates
 - b. Generic and excursion risk assessments - include any unacceptable risks, e.g. medical-related where the establishment should seek general medical advice and may need to seek further advice and information from the participant's own doctor or parents.
 - c. Contingency plan for all emergencies – take advice from the Foreign & Commonwealth Office in advance for travel abroad
 - d. Transport
 - e. Insurance – ensure that detailed information regarding group members and any potential medical or physical impairment problems is communicated in advance to the insurers (commercial and/or through the Council Insurance scheme)
 - f. Costs and payment plan
 - g. Group membership
 - h. Staffing
4. Day or part day excursions
 - a. Well in advance obtain approval and parental consent for planned day excursions
 - b. Inform parents as necessary of other, shorter routine excursions

- c. Brief participants
 - d. Monitor risks
- 5. Residential and abroad
 - a. Obtain parental consents.
 - b. Advise group members on passport and European Health Insurance Card (EHIC) requirements as appropriate
- 6. Final preparation
 - a. Information to and from parents.
 - b. Briefing evening (meet the supervisors).
 - c. Brief participants.
 - d. Deposits/full payments by parents
- 7. After the excursion
 - a. Obtain feedback by sampling opinions from parents, participants and staff

3 Supervision

Ratios

1. It is important to have the appropriate ratio of adult supervisors to participants for any excursion. The factors to take into consideration include:
 - a. sex, age and ability of group
 - b. participants with special educational or medical needs
 - c. for outdoor and adventurous activities refer to the [Highland Council Outdoor Education Safety Document](#)
 - d. experience of adults in off-site supervision
 - e. duration and nature of the journey
 - f. type of any accommodation
 - g. competence of staff, both general and on specific activities
 - h. requirements of the organisation/location to be visited
 - i. competence and behaviour of participants
 - j. first aid cover.
2. Staffing ratios for excursions are difficult to prescribe as they will vary according to the activity, age, group, location and the efficient use of resources, however, a general guide for excursions to local historical sites, museums or for local walks, in normal circumstances, will be;
 - a. 1 adult for every 6 participants up to 8 years of age (in school years P1 to P3)
 - b. nursery classes should have a higher ratio if possible
 - c. 1 adult for every 15 participants for others excursions
 - d. with a minimum of two adults for all excursions
 - e. Residential supervision will require a ratio of 1 member of staff to 10 participants with male and female adults in attendance for mixed gender groups.
3. There should be a minimum of one leader in charge at all times.
4. In addition to the leader in charge there should be enough supervisors to cope effectively with an emergency.
5. When excursions are one or several of the following, the risks may be greater and supervision levels should be set accordingly;
 - a. residential
 - b. visits abroad
 - c. to remote areas
 - d. involve adventurous activities.

Parents/Volunteers

1. Where there is more than one leader/supervisor, a group leader who has authority over the whole group must be appointed.
2. If more than one group is involved an overall group leader should be identified, usually the person with the most experience in leading such excursions.

3. Where a high leader: participant ratio is required, it is not always feasible to use establishment staff alone. Parents/volunteers may be used to supplement the supervision ratio. They should be carefully selected and ideally they should be well known to the establishment and the group. Anyone who has not had a criminal conviction check should never be left in sole charge of participants.
4. Refer to the Highland Council, Education Culture and Sport Service 'Guidance on Managing and Vetting Volunteers' document by clicking [here](#)

Vetting suitability - Disclosure Scotland

1. Any adult who is in substantial and regular contact with children should be subject to an Enhanced Disclosure Check before working with children; this includes volunteers and parent helpers. There are some circumstances in which the group leader may judge that the limited level of contact means a Disclosure Check is not necessary. This would be limited to situations such as:
 - a. an occasional involvement as a helper or driver on a day excursion in which other staff are Disclosure Checked and have received child protection training, and in which the adult will not take sole supervision of children;
 - b. the short-term involvement by an individual or contractor with a group of children during their excursion, where the group continues to be supervised at all times by the group leader and staff who are Disclosure Checked and trained in child protection.
2. Care must be taken to consider suitable supervision for activities such as sports and swimming (e.g. changing rooms), personal assistance for disabled children, and night-time care and safety during residential activities. In circumstances such as these an Enhanced Disclosure Check and child protection training should be considered essential.
3. Education authorities should provide advice on Disclosure Checks for volunteers, or this can be gained direct from Disclosure Scotland <http://www.disclosurescotland.co.uk/> Advance planning is essential to ensure that staff can be Disclosure Checked well in advance of excursions if this will be necessary. Voluntary organisations not already registered with Disclosure Scotland must do so before their staff can apply to be checked.

Supervisors' responsibilities

1. All adult supervisors, including teachers, parent/volunteer helpers, must understand their roles and responsibilities at all times. It may be helpful to put this in writing. In particular, all supervisors should be aware of any participants who may require closer supervision, such as those with special needs or those likely to be disruptive. Leaders retain responsibility for the group at all times.

Competences if leading an adventure activity

1. If the establishment is leading an adventure activity, such as canoeing, the

head of establishment must ensure that the group leader and other supervisors are suitably competent to lead or instruct participants in the activity.

2. According to the Health and Safety Executive there are four ways to demonstrate the competence of leaders;
 - a. Holding the relevant qualification
 - b. Holding an equivalent qualification
 - c. Having received appropriate in-house training
 - d. Being competent through experience.

Head counts

1. Whatever the length and nature of the excursion, regular head counting of participants must take place, particularly before leaving any venue.
2. Supervisors must carry a list of all participants, including adults involved in the excursion at all times.
3. Participants, particularly up to 8 years of age (school years P1 to P3), should be easily identifiable, especially if the excursion is to a densely populated area. Brightly coloured caps, T shirts or, for school groups, a school uniform can help identify group members more easily.
4. Participants should not wear name badges.
5. Some establishments, however, find it useful to provide participants with badges or sticky labels (or their equivalent) displaying the name of the group and emergency contact details.
6. The group leader should establish rendezvous points and tell participants what to do if they become separated from the group – mobile phones may be useful in this context.
7. In many circumstances it can be useful to divide a large group into several smaller ones and to give one member of staff first-line responsibility for participants in each group.

Remote supervision (unaccompanied but remotely supervised)

1. The aim of excursions for older participants may be to encourage independence and investigative skills, and some of the time on excursions, such as trips abroad and field-work may be unaccompanied but remotely supervised. Duke of Edinburgh Award practice and qualifying Expeditions are a good example.
2. The group leader should establish during the planning stage of the excursion whether the participants are competent enough to be given the freedoms associated with being unaccompanied but remotely supervised and should ensure that parents have agreed to this level of supervision.
3. The group leader remains responsible for participants even when not in direct contact with them.
4. Parents must be told, before the excursion, if any form of remote supervision is to take place, a letter seeking parental consent, must include this information
5. See [Preparing participants for remote supervision](#) in Section 4.

6. For remote supervision during adventurous activities, refer to the Highland Council '[Outdoor Education Safety Document](#)'.
7. For [Supervision on transport](#) see Section 6.

Unsupervised excursions (unaccompanied and unsupervised)

1. The general principle is that ECS staff will not organise any unsupervised excursions (in part or in whole) for pupils for whom they or their establishment have a day to day responsibility.
2. Highland Council should not be put in a position where the following criteria apply due to the lack of an experienced member of staff accompanying or being in close proximity to the participants
 - a. Highland Council is unable to provide a direct educational contribution to the excursion
 - b. Highland Council is unable to render direct guidance re safety
 - c. Highland Council is unable to render direct assistance in the event of an incident or accident
 - d. Highland Council is unable to invoke plan 'B'

Exceptional Circumstances

1. Inevitably there will be circumstances when an unsupervised excursion may be deemed to be appropriate by the establishment responsible for the day to day safety of the pupils and in such cases the final section of this note should be referred to in considering who provides the requisite authority. It may be considered that such an excursion would be appropriate in the following circumstances:-
 - a. such an excursion would benefit the participant's personal development
 - b. such an excursion is part of a planned programme of learning to reach an agreed outcome
 - c. the proposed participants are of an age commensurate with the level of self reliance required
 - d. the proposed participants are assessed to have previously displayed appropriate behaviour
 - e. the proposed participants have been fully briefed with regards what to do in the event of delays, missed transport links, no shows with regards scheduled meetings, incidents or accidents etc.
 - f. the proposed participants have been allocated a 24/7 emergency contact support person from the organising establishment and
 - g. the proposed participants have received skills training that is appropriate to the level of self reliance required
2. In such cases where exceptional circumstances are thought to apply careful consideration should be given to the reasons why Highland Council should be organising an unsupervised excursion. In most cases it is likely to be more appropriate for parents to be informed of the opportunity and if they so wished, to organise the excursion themselves.

Authorisation

1. Situations where unsupervised excursions take place will vary greatly from
 - a. nipping round to the local post office; to
 - b. travelling abroad
2. Accordingly the appropriate authority will vary as follows:-
 - a. Local to a school – Head of Establishment
 - b. Local to the area – Head of Establishment
 - c. Outwith the area – Area Manager
 - d. Overseas – Head of Service

Use of the EVOLVE system to Record Unsupervised Excursions

1. As with all Off Site Excursions, an EVOLVE visit form should be completed and submitted prior to the excursion taking place.

Excursion Risk Assessments

1. As with all Off Site Excursions, an [excursion risk assessment](#) should be completed collectively by the Highland Council staff organising the excursion. Please refer to the [Worked Example](#) of an excursion risk assessment for guidance.

Duke of Edinburgh Award

1. The above should not be confused with unaccompanied practice and qualifying expeditions that are 'remotely supervised'
2. The responsibilities of an Expedition Supervisor as noted in the Expedition Supervisors' Training Pack on page 28 are;

[Supervision of unaccompanied practice journeys](#)

Where the Supervisor takes on a close monitoring role and intervenes in order to ensure that there is the correct degree and application of training

[Supervision of the qualifying venture](#)

Where the Supervisor and the Assessor work together to facilitate the success of the Team using remote supervision to intervene as little as possible. Contact should only take place to ensure the safety and well being of the young people. This should be at least once a day and the Team should be seen at their campsite each evening.

Insurance

1. The [School Travel Policy](#) will provide cover for participants as stated within its terms and conditions, when the appropriate premium has been paid.
2. Participants taking part in unsupervised excursions will be covered by Highland Councils Civil Liability cover automatically as they are when taking part in remotely supervised D of E Expeditions.

4 Preparing participants for excursions

General

1. Participants who are involved in an excursion's planning and organisation, and who are well prepared, will make more informed decisions and will be less at risk.
2. Providing information and guidance to participants is an important part of preparing for an excursion.
3. Refer to the example [checklist for participants](#)

Participation

1. The group leader should ensure that the participants are capable of undertaking the proposed activity.
2. Participants should be encouraged to take on challenges during adventurous activities but should not be coerced into activities of which they have a genuine fear.
3. Participants, whose behaviour is such that the group leader is concerned for their safety, or for that of others, should be withdrawn from the activity.
4. On residential excursions the group leader should consider whether such participants should be sent home early. Parents and participants should be told in advance of the excursion about the procedures for dealing with misbehaviour, how a participant will be returned home safely and clarifying that the cost will be charged to the parent.

Equal opportunities

1. For general information about Equal Opportunities including HC's Policy, please refer to Highland Council's [Equal Opportunities web page](#).
2. Within this document please refer to the section '[Children with Additional Needs](#)' for guidance re the Disability Discrimination Act.
3. Every effort must be made to ensure that trips, excursions and activities are available and accessible to all who wish to participate, irrespective of special educational or medical needs, ethnic origin, sex, religion etc.
4. All young people should be encouraged to participate in as wide a range of activities as possible.
5. If an excursion is to cater for participants with special needs, a suitable venue should be selected.

Information to participants

1. The group leader should decide how information is provided, but must ensure that the participants understand key safety information. For some participants on overnight excursions it will be their first experience away from home on their own and in the close company of other people.

2. Where possible participants should be involved in planning, implementing and evaluating their own input to the excursion and have opportunities to take different roles within an activity. This should include considering any health and safety issues.
3. Participants should understand;
 - a. the aims and objectives of the excursion/activity
 - b. the background information about the place to be visited
 - c. why safety precautions are in place
 - d. why special safety precautions are in place for anyone with disabilities
 - e. what standard of behaviour is expected from participants
 - f. appropriate and inappropriate personal and social conduct
 - g. who is responsible for the group
 - h. what to do if approached by anyone from outside the group
 - i. rendezvous procedures
 - j. what to do if separated from the group
 - k. emergency procedures
 - l. that the use of mobile phones is recommended especially during extended excursions and group members should be provided with important phone numbers including those of the Group Leader, Depute Group Leader and base contact numbers together with those of the main contact back home
 - m. any potential dangers and how they should act to ensure their own safety and that of others
 - n. basic foreign words where appropriate
 - o. relevant foreign culture and customs (see Section 9 Excursions Abroad)
 - p. what not to bring back either within the UK or from abroad such as drugs, knives etc.
4. Refer to the example form; [information for participants](#)
5. For residential excursions all group members should carry the address and telephone number of the accommodation in case an individual becomes separated. This applies to exchange excursions when participants will also need to know about any ground rules agreed between the group leader and host family.
6. Where excursions involve multiple activities with differing requirements each activity will need to be assessed and separate information provided. Participants should be aware of who is responsible in any instances where the group leader has delegated responsibility to another member of staff or instructor.
7. If at any time there is a change in the planned schedule new activities must be risk assessed and participants and staff provided with the appropriate information.

Preparing participants for remote supervision

1. During any time that remote supervision takes place the group leader must ensure that participants are aware of the ground rules and are adequately equipped to be on their own in a group.
2. The size of each group should also be considered. As a minimum, participants should have the following;
 - a. a mobile telephone
 - b. telephone numbers and emergency contacts if lost
 - c. money; maps and plans and any other information for them to act effectively
 - d. location of local telephones and the appropriate coins or cards;
 - e. a knowledge of how to summon help
 - f. a knowledge of out of bounds areas or activities
 - g. personal identification and a rendezvous point.
3. It is important that participants are told not to go off on their own, are given clear instructions about permitted remote supervised activities and understand and accept the ground rules.
4. Refer to Section 3 [Remote Supervision](#) for further information.
5. For remote supervision during adventurous activities refer to the Highland Council [Outdoor Education Safety document](#).

Transport and participants

1. Participants using transport on an excursion should be made aware of basic safety rules including;
 - a. arrive on time and wait for the transport in a safe place
 - b. do not rush towards the transport when it arrives
 - c. wear your seatbelt and stay seated whilst travelling on transport
 - d. never tamper with any of the vehicle's equipment or driving controls
 - e. bags must not block aisles or cause obstructions
 - f. never attempt to get on or off the moving transport; never lean out of or throw things from the window of the transport
 - g. never get off a vehicle held up by traffic lights or in traffic
 - h. never run about or pass someone on steps or stairs while transport is moving
 - i. never kneel or stand on seats
 - j. never distract or disturb the driver or impede the driver's vision
 - k. stay clear of doors after boarding or leaving the transport
 - l. if a vehicle is towing never stand between it and the trailer
 - m. after leaving the vehicle, always wait for it to move off before crossing the road
 - n. if you have to cross roads to get to the transport in the UK always use the [Green Cross Code](#)
 - o. if you feel unwell tell the group leader or supervisor.
2. The group leader should ensure that participants know what to do if they miss the scheduled departure time.

Participants with medical needs

1. Additional safety measures to those already in place in the establishment may be necessary to support participants with medical needs during excursions. Arrangements for taking medication and ensuring sufficient supplies for residential excursions may be required.
2. All supervisors of groups must be aware of a participant's medical needs and any medical emergency procedures.
3. [Consent forms](#) held by all leaders, containing details of each participant's needs and any other relevant information provided by parents, is one way of achieving this.
4. If appropriate, a volunteer should be trained in administering medication, if they have not already been so trained, and should take responsibility in a medical emergency.
5. If the participant's safety cannot be guaranteed, it may be appropriate to ask the parent or a care assistant to accompany a particular participant.
6. The group leader should discuss the participant's individual needs with the parents.
7. Parents should be asked to supply;
 - a. details of medical conditions
 - b. emergency contact numbers
 - c. the child's GP's name, address and phone number
 - d. information on whether the participant has spent a night away from home before and their ability to cope effectively
 - e. written details of any medication required (including instructions on dosage/times) and parental permission to administer
 - f. parental permission if the participant needs to administer their own medication or agreement for a volunteer to administer
 - g. information on any allergies/phobias
 - h. information on any special dietary requirements
 - i. information on any toileting difficulties, special equipment or aids to daily living
 - j. special transport needs for participants who require help with mobility.
8. Enquiries should be made at an early stage about access and facilities for securing wheelchairs on transport and at residential centres etc, if appropriate.
9. If ramps are not going to be available in certain places, the organiser may wish to arrange to take portable ramps.
10. The group leader should at an early stage assess whether manual handling skills will be needed and, if so, whether training should be sought.
11. All leaders supervising the excursion should be given the opportunity to talk through any concerns they may have about their ability to support the child.
12. Extra help should be requested at the planning stage, if necessary, e.g. a care assistant.
13. If leaders are concerned about whether they can provide for a participant's safety or the safety of other participants on a trip because of a medical

- condition, they should seek general medical advice and may need to seek further advice and information from the participant's own doctor or parents.
14. The group leader should check that the insurance policy covers staff and participants with pre-existing medical needs and conditions at the planning stage.

Participants with additional support needs

1. Establishments will already be familiar with the nature of a participant's additional support needs. Any limitations or problems the participant may have should be taken into account at the planning stage and when carrying out the risk assessment.
2. Off-site excursions may pose additional difficulties for a participant with ASN and the behaviour of some participants may prove challenging.
3. The following factors should be taken into consideration;
 - a. is the participant capable of taking part in and benefiting from the activity?
 - b. can the activity be adapted to enable the participant to participate at a suitable level?
 - c. will additional/different resources be necessary?
 - d. is the participant able to understand and follow instructions?
 - e. will additional supervision be necessary?
 - f. the necessity to ensure compliance with Disability Discrimination legislation.
4. It may be helpful to the participant if one of the supervisors already knows them well and appreciates their needs fully.
5. The group leader should discuss the excursion with the parents of participants with ASN to ensure that suitable arrangements have been put in place to ensure their safety.

5 Communicating with Parents

1. Parents must be informed in writing of any off-site activity or excursion unless it is a regular activity that parents have already been informed of through programme, prospectus (in establishments) or a letter.
2. Seeking annual consent for such routine excursions may be appropriate.
3. What follows is guidance re providing parents with 'informed consent' from the Health and Safety Executive
 - a. 'Glenridding Beck – Conclusions' published by the [Health and Safety Executive](#), for the complete document, click [here](#)
 - i. Children should be actively involved in discussion of the activities and how they can be done safely. Through this they will absorb the principles of being "risk aware" rather than "risk averse". This is an educational issue as well as a safety issue because risk awareness is an essential life skill.
 - ii. One of the characteristics of the Glenridding visits was the lack of involvement of the children in discussion of activities or the risks. Their preparation for the visit was largely a description of the plunge pool that built up an expectation. The tragedy occurred when conditions were too severe for that expectation to be met safely.
 - iii. In contrast there are many other school adventure visits where the children have been involved throughout the planning stage. In some instances the pupils themselves have given the presentation on the proposed activities and safety precautions at the parents meeting. Such a level of involvement has proved highly enriching.
 - iv. Another key aspect of involvement is the "transparency of risk". Parents and their children need to have some appreciation of the risks involved in both the main and alternative activities if they are to give informed consent.
 - v. A parent who has knowingly accepted a risk (for instance that a child might trip on a mountain path and break a limb) when giving consent will have few grounds for complaint against a diligent leader if such an incident occurs.
4. The following two paragraphs are provided by the [Adventure Activities Licensing Authority](#) via their document Collective Interpretation 1.18 - Acknowledgement of Risk.
 - a. "The aim of Acknowledgement of Risk statements is to also inform potential participants so that they can make an informed decision about participation. Moreover, if they do decide to participate they have a much better idea about what they need to do to contribute to their own safety. Evidence suggests this can have a significant affect on decreasing the number of accidents without reducing participation rates."
 - b. "It will be pertinent to remind participants (and their parents where appropriate) that this is not a disclaimer; no one loses any of their legal rights by signing an acknowledgement of risk. The aim is to ensure that only the right people end up on the activity, that no one is confused or

mislead, and that they are aware of what will or may occur as a result of participating. It is important to remember that what may be incredibly obvious to the organisers of the activity may not be obvious to the intending participants.”

Information to Parents

1. Before residential excursions, or when the participants are to travel abroad or engage in adventure activities, parents should be encouraged to attend a briefing meeting where written details of the proposed excursion should also be provided.
2. There should be alternative arrangements for parents who cannot attend or who have difficulty with communication in English.
3. Parents need to be aware that the leaders and other adult supervisors on the excursion will be exercising the same care that a prudent parent would.
4. The following information on matters that might affect participant health and safety should be given to parents;
 - a. dates of the excursion
 - b. excursion's objectives
 - c. times of departure and return - parents must have agreed to meet their child on return
 - d. the location(s) where the participants will be collected and returned
 - e. mode(s) of travel including the name of any travel company
 - f. the size of the group and the level of supervision including any times when remote supervision may take place
 - g. details of accommodation with security and supervisory arrangements on site
 - h. details of provision for special educational or medical needs;
 - i. procedures for participants who become ill
 - j. names of leader, of other staff and of other accompanying adults
 - k. details of the activities planned and of how the assessed risks will be managed
 - l. standards of behaviour expected in respect of, for example, alcohol, sex, smoking and general group discipline including prohibited items. This information may take the form of a code of conduct which both parents and participants should sign; an example is provided [here](#)
 - m. what participants should not take on the excursion or bring back
 - n. details of insurance taken out for the group as a whole in respect of luggage, accident, cancellation, medical cover, any exceptions in the policy and whether parents need to arrange additional cover
 - o. clothing, equipment and money to be taken
 - p. the information to be given by parents and what they will be asked to consent to
 - q. on exchange excursions, the details of the host families; for example, whether they have hosted any groups or participants before
 - r. details on the cost of the excursion, refer to [financial planning](#) and [charging for excursions](#) in section 2

Parental consent

1. Heads of Establishment or group leaders should seek consent for;
 - a. unscheduled excursions involving participants up to 8 years of age (school years P1 to P3) no matter how short the excursion
 - b. adventure activities, parental consent letters should contain Highland Councils [Youth Participation Statement](#)
 - c. excursions abroad
 - d. other residential excursions
 - e. [Remote supervision \(unaccompanied but remotely supervised\)](#)
 - f. [Unsupervised excursions \(unaccompanied and unsupervised\)](#)
2. If parents withhold consent absolutely, the participant should **not** be taken on the excursion.
3. In the case of a school excursion the curricular aims of the excursion should be delivered to the participant in some other way wherever possible.
4. If the parents give a conditional consent the head of establishment will need to consider whether the participant may be taken on the excursion or not.
5. In certain circumstances it may be appropriate to seek and consider the views of the child and seek advice of the Council contact.
6. A parental consent form should be completed for each participant in the group. Refer to the [examples](#) in section 12.
7. Besides conveying the parents' consent it could also form the basis for obtaining details required.
8. If a tour operator is used it may be sensible to ask them what information to obtain.
9. General issues to consider include;
 - a. any allergies/phobias the participant may have
 - b. any medication the participant is taking (if so what the dosage is and who is to administer it)
 - c. whether the participant administers their own medication
 - d. any contagious or infectious diseases suffered within the family during the preceding 4 weeks, and any other recent illnesses suffered by the participant
 - e. the name, address and phone number of the participant's GP
 - f. any special/medical dietary requirements
 - g. whether the participant suffers from travel sickness
 - h. information on any toileting difficulties
 - i. whether the participant has any night time tendencies such as sleepwalking (for residential excursions)
 - j. the participant's ability to swim in the pool or sea and their level of safety awareness
 - k. any other information which the parent thinks should be known
 - l. the parental home and daytime phone numbers and addresses
 - m. an alternative contact, with their phone number and address.
10. The contents of a consent form for a parent to sign will vary according to the type of excursion.

Medical consent

1. This should form part of the parental consent form.
2. Parents should be asked to agree to the participant's receiving emergency treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities.
3. If parents do not agree to this, heads of establishment may decide to withdraw the child from the excursion - given the additional responsibility this would entail for the group leader.
4. Doctors can be expected to carry out necessary emergency treatment without parental consent but it is possible that a surgeon in another country might be reluctant to operate on a participant unless assured that the group leader had parental authorisation to agree to such treatment.

Other consent

1. Parental consent should be obtained specifically for the transporting of participants in a private vehicle on an excursion.

Early return

1. The group leader must tell parents if they will be expected to fund the early return of a pupil whose conduct gives cause for concern on an excursion. A written agreement is necessary.
2. Heads of Establishment must ensure that parents can contact their child via the Base contact and the group leader in the event of a home emergency, and that they have a number to ring for information in the event of an incident during the excursion or a late arrival home.
3. Parents must therefore;
 - a. know the destination details
 - b. be aware of the emergency contact arrangements at home (particularly important during holiday periods when the establishment may be closed) and at all the venues the group will visit
 - c. provide contact numbers for day and night use in an emergency.
4. This is best done by means of the consent form.

Participants' contact with parents

1. Group leaders should arrange for parents to be told by the base contact of the group's safe arrival.
2. One way of doing this is to use a Telephone Answering Service e.g. at schools
3. Establishments other than schools will need to make alternative arrangements.
4. This could be used to confirm safe arrival, give progress information and inform waiting parents of any unforeseen delays.

6 Planning Transport

General cross reference

1. The group leader must give careful thought to planning transport.
2. All establishments should follow Council transport policies. The main factors to consider include;
 - a. passenger safety;
 - b. the competence and training of the driver to drive the proposed vehicle and whether the driver holds the appropriate valid licence;
 - c. number of driving hours required for the journey and length of the driver's day (including non-driving hours);
 - d. capacity and experience of driver to maintain concentration - whether more than one driver is needed to avoid driver fatigue;
 - e. type of journey - will the excursion take place locally or will it include long distance driving i.e. motorways;
 - f. traffic conditions;
 - g. contingency funds and arrangements in case of breakdown/emergency;
 - h. appropriate insurance cover;
 - i. weather;
 - j. journey time and distance;
 - k. stopping points on long journeys for toilet and refreshments;
 - l. supervision.

Legislation

1. The Head of Establishment / Lead Officer should satisfy themselves that all travel arrangements, including the hire of private coaches or buses, are suitable for the nature of the visit.
2. The driver is responsible for the vehicle during the visit.
3. Seat belts: All minibuses and coaches which carry groups of three or more children aged between 3 and 15 years inclusive must be fitted with a seat belt for each child. The seats must be forward or rearward facing and seat restraints must comply with legal requirements. For further information contact the [Department for Transport](#)
4. For further information contact the [Traffic Commissioner for Scotland](#).
5. Refer to the '[Minibus Safety](#)' section on RoSPA's web site.
6. Refer to '[Driving a Minibus](#)' on the Directgov web site.

Supervision on transport

1. The level of supervision necessary should be considered as part of the risk assessment for the journey.
2. The group leader is responsible for the party at all times including maintaining good discipline.
3. On any excursion, the driver should not normally be responsible for

- supervision.
4. Driver supervision may be sufficient if a small number of older children are being taken on a short journey.
 5. All group members should be made aware of the position of the emergency door and first-aid and anti-fire equipment on transport.
 6. The group leader should also be aware of alternative routes or means of travel in the event of delay or cancellation.
 7. Factors that the group leader should consider when planning supervision on transport include;
 - a. the level of supervision that will be necessary on double-decker buses e.g. one supervisor on each deck should be appropriate in normal circumstances
 - b. safety when crossing roads as part of the journey - the group leader should ensure that participants know how to observe the safety rules set out in;
 - i. the [Highway Code](#) and
 - ii. the [Green Cross Code](#)
 - iii. and those pertaining to travel abroad.
 - c. pedestrian crossings and traffic lights or footbridges should be used to cross roads, whenever possible
 - d. safety on buses, trains, ferries and boats - the group leader should make clear to participants how much or little freedom they have to 'roam'.
 8. Misbehaviour is a main cause of accidents to children on such means of transport, appropriate supervision and discipline should be maintained at all times.
 9. Participants should also be made aware of what to do in an emergency and where emergency procedures are displayed.
 10. Booking transport - the group leader should arrange for seats to be reserved well in advance to ensure that the party can travel together.
 11. Consider the safety of participants while waiting at pick-up and drop-off points and when getting on or off transport, particularly when using UK vehicles abroad.
 12. Participants should be made aware of safety rules and expected standards of behaviour. Refer to [transport and participants](#) in Section 4.
 13. Safety while on stops or rests during the journey - group leaders should plan with the driver sufficient stops at suitable areas to ensure the safety of all group members including the driver.
 14. Drivers of buses and coaches must comply with legislation covering maximum periods of driving and minimum rest periods.
 15. Safety of the group in the event of an accident or breakdown - the group should remain under the direct supervision of the group leader or other staff wherever possible.
 16. Head counts, by the group leader or another delegated member of staff or supervisor, should always be carried out when the group is getting off or onto transport.
 17. The driver has the responsibility for checking that all seat belts are worn

- correctly and fastened.
18. Consider whether a visible and easily recognisable article of clothing should be worn in common by participants.
 19. Participants should be made aware that they are not allowed access to the driving area at any time.
 20. Group members should be made aware that travel sickness tablets should only be administered to a participant with previous authorisation from the parents.

Vetting non-staff drivers

1. Refer to [vetting suitability](#) in Section 3.

Hiring coaches and buses

1. The group leader is responsible for ensuring that coaches and buses are hired from a reputable company.
2. Professional operators of buses and coaches are legally required to be licensed.
3. Establishments using operators to transport participants should ensure that the operators have the appropriate public service vehicle (PSV) operators' licence, for example by asking for the Operator's Licence number when seeking a price.
4. "A Practical guide to Safe School Trips" produced by the Scottish School Board Association, gives a few notes re [VOSA](#) and drivers hours. Quoting from the above; "When hiring a vehicle, particularly for long journeys, always ask for an itinerary that includes driver rest periods and where the appropriate driver changes. VOSA will again be happy to confirm the practicality of such journeys should you have any concerns."
5. All coaches and buses must have the Operator's Licence disc (same size as a tax disc) displayed in the windscreen when in use.
6. When booking transport, the group leader should ensure that seat belts are available for participants. **Vehicles not equipped with appropriate seat restraints must not be used.**
7. If any of the group uses a wheelchair, the group leader should ensure that transport used has appropriate access and securing facilities. Sufficient advance notice should always be given to the coach company in such circumstances.

Additional information relevant to coach trips

The School Travel Forum <http://www.schooltravelforum.com> is a site which contains some interesting information.

A Practical Guide to Safe School Trips by the Scottish School Board Association notes that the IBT Travel group, <http://www.ibtski.com/> based in Prestwick is a company that provides 'complete travel solutions'. It also provides information re

contacting the 'Confederation of Passenger Transport' <http://www.cpt-uk.org/> based in Edinburgh.

CoachMarque, a quality standard for Coach Operators can be read about on this web site <http://www.coachmarque.org.uk/>

Licences and Permits

1. Establishment minibuses may be driven in normal circumstances in the UK by Highland Council approved drivers.
2. Heads of Establishments should be aware that special circumstances apply if the minibus is to be driven outside the UK and contact should be made at an early stage in the planning process with the Council's insurance and risk manager and Tech services.
3. Drivers of any vehicle must ensure that they have the correct entitlement on their licence.

Establishment minibus driver

1. Although the head of establishment is ultimately responsible for the minibus, the driver is responsible for the vehicle during the excursion.
2. The minibus driver must be qualified to drive a minibus and have a valid driving licence free from major convictions- see [Licences and permits](#) above.
3. It is essential for all those who may drive the establishment minibus to receive training in minibus driving and the management of passengers.
4. The MiDAS ([Minibus Driver Awareness Scheme](#)) training programme is widely recognised and strongly recommended.
5. PSV Drivers' hours regulations, though not statutory in this case, should be observed as a matter of good practice. *Refer to Highland Council Minibus Code of Practice – available to all establishments from Area Education Offices.*
6. The minibus driver must;
 - a. observe council guidance
 - b. not consume any alcohol while in charge of a vehicle used for an educational excursion
 - c. not drive when taking medication or undergoing treatment that might affect their ability or judgement
 - d. be aware of speed limits which are not the same as for cars
 - e. ensure that all passengers have unobstructed access to two exits (therefore no luggage blocking aisles)
 - f. know what to do in an emergency
 - g. know how to use fire fighting and first-aid equipment
 - h. avoid driving for long periods and ensure that rests are taken when needed
 - i. clarify and comply with transport regulations and the requirements of the vehicle's insurance cover
 - j. take into consideration the effects of the working day

- k. have regular medical checks e.g. eyesight.

Maintenance and checks of establishment minibuses

1. The head of establishment is responsible for the minibus.
2. However, a head of establishment may delegate to a willing member of staff responsibility for carrying out regular checks and ensuring that the minibus is maintained.
3. This member of staff should report to the head of establishment, who is responsible, along with other staff, for ensuring the safety of participants on organised journeys.
4. The person responsible for maintaining the minibus must;
 - a. check the vehicle's condition on a weekly basis
 - b. ensure proper servicing by a reputable garage
 - c. maintain the record-of-use book with the service history, insurance and other relevant documents
 - d. ensure that any staff driving the minibus are competent and have undertaken suitable training to do so
 - e. always be informed before other staff use the minibus
 - f. ensure that drivers of the minibus are aware that the vehicle should always be logged in and out.
5. For organising your own transport for [excursions abroad](#) refer to section 9.

Private cars

1. Staff who drive participants in their own car must ensure
 - a. their passengers' safety
 - b. that the vehicle is roadworthy
 - c. that they have appropriate licence and insurance cover for carrying the passengers.
2. For Highland Council staff, this will entail ensuring appropriate licence and comprehensive insurance cover for use on their employer's business.
3. Volunteers will normally be covered under Social, Domestic and Pleasure but must check the position with their insurers.
4. The Group Leader must ensure that this action has been taken.
5. All drivers must be vetted satisfactorily before they are permitted to drive participants in their car.
6. Refer to [vetting suitability](#) in Section 3.
7. The driver is responsible for making sure that passengers have a seat belt and use it at all times.
8. Vehicles without seat belts for all passengers must not be used.
9. New regulations governing the use of child car seats will come into force on 18 September 2006.
10. These new regulations will affect the transportation of children in cars, but not minibuses at present. A passages from the [Think Road Safety](#) Web Site is

copied below

- a. 'In buses and coaches (including minibuses) from 18 September 2006, seated passengers aged 14 years and above will have to use seat belts where they are fitted. Regulations requiring children 3 years to 13 years to use seat belts (or child restraints if they are available) in these vehicles will be brought forward as soon as practicable. The regulations will not include any obligation for anyone to provide child restraints in these vehicles. Bus and coach (including minibus) operators need to notify their passengers that seat belt wearing is compulsory.'
11. Heads of Establishment or group leaders who wish to use parents, volunteers or other participants to help transport passengers in their own cars, must ensure that they are aware of their legal responsibility for the safety of the passengers in their cars.
12. Parents' agreement should be sought (on the consent form) for their children to be carried in other parents' cars.
13. It is advisable that parents, volunteers or staff members driving participants are not put in a position where they are alone with a participant.
14. The group leader should arrange a central dropping point for all participants rather than individual home drops unless there is no reasonable and safe alternative.

Further Information re transport

Contact Willie MacPherson in TECS william.macpherson@highland.gov.uk

7 Insurance

General

1. The group leader must ensure, well before the group departs, that adequate insurance arrangements are in place.
2. The policy details for the following can be found in the 'Public Folders' section in Microsoft Outlook or in the 'HC Intranet' on the [Education Culture and Sport homepage](#).
3. Highland Council's insurance provides worldwide cover for excursions
4. The following policies are continually in place and no application or fee is required to obtain cover.
 - a. Public Liability Policy
 - b. Personal Accident Policy
 - c. 'All Risks' Policy
 - d. Employers Liability Policy
5. Highland Council's Public Liability Policy covers Staff whilst undertaking approved duties and when involved in after school activities. Volunteers and pupils are likewise covered.
6. Highland Council's Personal Accident Policy provides cover for accidents of employment and also covers staff, volunteer tutors and pupils when taking part in extra curricular activities, for example;
 - a. After school football & shinty matches
 - b. After school mountain bike clubs
7. Highland Council's 'All Risks' policy provides cover for sports equipment and trailers. Sports equipment includes, equipment associated with adventurous activities e.g. canoes, bikes, tents, stoves, skis etc.
8. Highland Council's Employers Liability Policy provides cover to indemnify the council against legal liability arising from claims for injury to employees.
9. Employee's personal effects and vehicles are not covered by the council's insurance policies.

Additional Insurance

1. Additional insurance for Education Staff, Volunteers and pupils through the [School Travel Insurance Policy](#) is available by application and payment of a premium, the additional areas of cover are;
 - a. Cancellation and other expenses
 - b. Medical and associated expenses
 - c. Personal effects and Money
2. The excursion organiser should inform parents of which responsibilities the establishment accepts and the scope of any insurance cover the establishment is to arrange e.g. School Travel Policy
3. It is advisable to make copies of the insurance schedule available to parents as early as possible in the booking process.

Insurance cover for excursions

1. Insurance provided by Highland Council provides cover whilst engaged in competitions e.g.
 - a. Cross country running
 - b. Orienteering
 - c. Cycling and mountain biking
 - d. Sailing
 - e. Canoesport
 - f. Climbing
 - g. Skiing
 - h. Etc
2. Competitions involving any power craft on water, land or in the air are excluded.
3. The excursion organiser should scrutinise carefully the list of exclusions in any policy. If there is any doubt about the cover the insurer should be asked for clarification.
4. Additional cover may be necessary for participants with medical conditions.
5. **It is essential that insurers are made aware of such information.** The excursion organiser should check this with the insurance company before departure, providing full details, including written medical advice, where appropriate.

Cancellations

1. The excursion organiser should forward any cancellations to the insurer/operator as soon as possible, in writing, if a replacement is not available.
2. Delay in notification may incur charges.

Transport

1. Taking the establishment minibus abroad may require extra insurance; contact the transport manager for further details.
2. The excursion organiser should check that the driver of the minibus abroad is appropriately insured and that their driving licence is valid for the countries to be visited or passed through en route.
3. Staff, other adults or participants using their own cars to carry passengers on excursions should ensure;
 - a. The vehicle is taxed
 - b. The driver has an appropriate license
 - c. The driver has appropriate insurance

8 Types of excursion

Home Stays (Exchange Visits)

1. The aim of this guidance is to ensure that the 'proposer' (school/youth club/community group etc.) of a 'home stay' exchange visit, often a Secondary School, has taken steps to minimise any Health & Safety and Child Protection issues.
2. The guidance seeks to create a clear system that can be replicated by the exchange partner, whether in this country or elsewhere.
3. The guidance seeks to re-assure the 'proposer' and parents of children involved that all practical steps have been taken to ensure the health, safety and welfare needs of the participants.
4. Staff following the proposed policy and procedure will be complying with the expectations of the Highland Council and hence be fully supported by the Council.
5. The measures outlined in the guidance are achievable and appropriate for Highland Council staff to follow so that guests coming from elsewhere can be assured they will be accommodated safely.
6. It is realised that hosts in other counties might not consider it necessary to replicate our guidance in full, but from Highland Council's perspective it would be good if they could, desirable, but not essential.
 - a. With reference to the Vetting Host Accommodation paragraph below, paragraph 3 d i "*(The Highland Council expectation is that group leaders would liaise with the host group leader to establish whether it is practical to carry out the necessary checks).*"
 - b. Section 3 d ii notes; "If the host establishment or placing agency does not have appropriate measures in place for carrying out checks to ensure the health, safety and welfare of exchange or home stay participants, the group leader should seek further assurances and/or reconsider whether the visits should take place. **The Highland Council expectation is that in all cases parents should be advised accordingly as to what checking procedures had been carried out.**"
7. In the case where a foreign host does not carry out checks identical to Highland Council's, the above passage indicates that seeking a written note of what checks have been done, by the foreign host, would potentially be acceptable.
8. This information would then be passed onto the parents of children in Highland, so that they could provide informed consent if they thought the checks were adequate.
9. Overall, the spirit of the policy is that we will ensure that what systems for checks are in place abroad are complied with, and tell parents when they do not directly compare with our systems, so that parents can make an informed choice.

Vetting Highland Host Accommodation

1. The establishment (school/youth group/community group) informs all parents of the decision to engage in an exchange visit that relies upon families volunteering to accommodate a child sent by the exchange partner.
2. The above letter will contain;
 - a. Dates of the exchange
 - b. Location of the exchange
 - c. Target year group/s
 - d. Maximum no. of participants sought
 - e. A request for parents to notify the establishment if they are interested in becoming involved with the exchange.
3. Upon receipt of noted interest, the establishment provides the following additional information by letter.
 - a. Highland Council values your offer to accommodate a young person from e.g. France, prior to the acceptance of this offer we would like to arrange a visit to your home to provide you with the opportunity to discuss the exchange in more detail and for 'your establishment e.g. Grantown Grammar School' to verify that the health, safety and welfare of the incoming participant during their stay with you will be satisfactory.
 - b. Highland Council is guided by the Scottish Executive document, Health and Safety on Education Excursions (HASEE). The following 2 passages are from that document.
 - c. Wherever possible, the group leader should undertake an exploratory visit to:
 - i. ensure at first hand that the venue is suitable to meet the aims and objectives of the excursion;
 - ii. assess potential areas and levels of risk;
 - iii. ensure that the venue can cater for the needs of the staff and participants in the group;
4. As a minimum the following accommodation has to be provided;
 - a. The young person should only be sharing a room with a person of the same sex.
 - i. Ideally, if there is to be room sharing, their should not be a large age gap between the children or young people concerned;
 - b. The young person should have his/her own bed (even if this is a fold up or temporary guest bed);
 - c. Access to night time bathroom facilities should not be via an adult's bedroom;
 - d. Access to a bedroom or other room used by adults or people of the opposite sex should not be via the young person's bedroom;
 - e. The child or young person should be provided with privacy for dressing or undressing.
5. After a successful exploratory visit on behalf of the exchange partner to the hosts' house in this country, a letter, including a pledge similar to the one below can be sent to the host family.
6. It should be made clear to all parents of children involved that all practical steps to ensure the health, safety and welfare of participants had been taken

but that the Highland Council could not guarantee to have personal knowledge of each host family, for this we are reliant upon the rigour of checks by our host organisers.

7. Please refer to the [‘Sample Pledge For Host Family’](#)
8. Please refer to the [‘Sample Letter For the Host Family’](#)

Vetting reciprocal host accommodation

1. Exchange or home stay visits can be arranged through agencies, in which case the agency should have some responsibility for vetting the host families (***The Highland Council expectation is that any agency contracted to organise such a trip would be expected to take responsibility for vetting host families and that we would need to be re-assured that this had been attended to.*** Group leaders making their own arrangements need to be clear about procedures in the relevant country for vetting the suitability of host families including criminal background checks insofar as these are available (***The Highland Council expectation is that group leaders would liaise with the host group leader to establish whether it is practical to carry out the necessary checks.***).
2. In some circumstances it is not possible for the group leaders involved in exchange visits between 2 distant establishments to undertake an exploratory visit, therefore an agreement between the exchange partners to carry out the following with regard to their proposed hosts is essential.
 - a. As a minimum the following accommodation has to be provided;
 - i. The young person should only be sharing a room with a person of the same sex.
 - ii. Ideally, if there is to be room sharing, there should not be a large age gap between the children or young people concerned;
 - iii. The young person should have his/her own bed (even if this is a fold up or temporary guest bed);
 - iv. Access to night time bathroom facilities should not be via an adult’s bedroom;
 - v. Access to a bedroom or other room used by adults or people of the opposite sex should not be via the young person’s bedroom;
 - vi. The child or young person should be provided with privacy for dressing or undressing.
3. Please refer to the ‘Sample Pledge For Host Family’
4. Please refer to the ‘Sample Letter For the Host Family’
5. If the host establishment or placing agency does not have appropriate measures in place for carrying out checks to ensure the health, safety and welfare of exchange or home stay participants, the group leader should seek further assurances and/or reconsider whether the visits should take place. ***The Highland Council expectation is that in all cases parents should be advised accordingly as to what checking procedures had been carried out.***

Adventure activities using licensed providers

Adventure activities using non-licensed providers

Establishment-led adventure activities

Employment of providers of adventure activities

Remote supervision during adventurous activities

1. For all of the above, refer to the Highland Council [‘Outdoor Education Safety Document’](#)
2. All parental consent letters should contain Highland Council’s [Youth Participation Statement](#) which is;
“Parents, carers and young participants should be aware that adventurous activity can result in accidents, and on rare occasions, some of these can be serious”

Coastal excursions

1. Group leaders and other staff will be aware that many of the incidents affecting participants have occurred by or in the sea.
2. There are dangers on the coast quite apart from those incurred in [swimming](#).
3. The group leader must bear the following points in mind when assessing the risks of a coastal activity;
 - a. Tides, rip tides, quicksand and sandbanks exposed at low tide are potential hazards
 - b. Timings and exit routes should be checked
 - c. Ensure group members are aware of warning signs and flags
 - d. Establish a base on the beach to which members of the group may return if separated
 - e. Look out for hazards such as glass, barbed wire and sewage outflows etc
4. Some of a group’s time on a beach may be recreational; therefore group leaders must consider which areas of the terrain are out of bounds.
5. Cliff tops can be highly dangerous for participants even during daylight. The group must keep to the path at all times.
6. Coastal paths should be subject to risk assessment before any use.
7. The local [coastguard](#), harbour master, lifeguard or tourist information office can provide information and advice on the nature and location of hazards.
8. Refer to [‘Group Safety at Water Margins’](#) produced by the CCPR.

Swimming in the sea or other natural waters

1. Recreational swimming and paddling in the sea or other natural waters are potentially dangerous activities for any group.
2. As with all activities, the group leader should have reviewed the generic, & if it exists, the site specific risk assessment prior to the excursion

3. Following on from the above the leader has to prepare an excursion risk assessment, where the hazards of swimming are fully reviewed and the control measures are very clear about the management of swimming in the field.
4. In the field the leader is responsible for 'dynamic risk assessments' and prior to any swimming taking place this must be done. There will be value in sharing this process with the group participants so that they can become aware of how to identify hazards and decide upon control measures.
5. If swimming is to take place, the whole event should be managed, the leader should be a strong confident swimmer who is prepared to enter the water if the need arises prior to or during swimming.
6. Managing swimming might involve
 - a. Moving from the first appealing location to a more suitable one
 - b. The leader going in the water to check the location out
 - c. Limiting the area to be used
 - d. Controlling the numbers of people in the water at one time
 - e. Having a throw line available

Swimming and paddling pools

1. If considering the use of a swimming (including paddling) pool not used before or monitoring the hazards of a regularly used pool it is necessary to observe and check the following;
 - a. Is there constant pool supervision by a sufficient number of qualified lifeguards?
 - i. Where there is no lifeguard the group leader must stay at the poolside at a raised location
 - ii. In such circumstances, the group leader, or a designated member of staff, must have a relevant life saving award and be accompanied by an appropriate number of supervisors
 - b. Have the participants been instructed how to behave in and around the water?
 - c. Is the water temperature appropriate?
 - d. Is the water clear?
 - e. Are there signs clearly indicating the depth?
 - f. Is there a shallow end and is the water there shallow enough?
 - g. Does the pool cater for participants with disabilities?
 - h. Does the deep end allow for safe diving?
 - i. Is there a poolside telephone?
 - j. Are there, a resuscitator and other pieces of first-aid and rescue equipment, and is there someone trained to use them?
 - k. Is there a changing room for each sex?
 - l. Does the pool cater for any particular religious or cultural factors?
 - m. Are the changing and showering facilities safe and hygienic?
 - n. Can clothes be stored securely?
2. Parental consent does not absolve the group leader's responsibility to check the level of a participant's swimming ability.

3. Refer to '[Water and Leisure Safety](#)' on the RoSPA web site.

Farm excursions

1. Farms can be dangerous even for the people who work on them. Taking children to a farm should be carefully planned.
2. The risks to be assessed should include;
 - a. those arising from the misuse of farm machinery
 - b. and the hazards associated with [E coli 0157](#) food poisoning and other infections.
3. The group leader must check;
 - a. that the farm is well-managed
 - b. that it has a good reputation for safety standards and animal welfare
 - c. that it maintains good washing facilities
 - d. that it has clean grounds and public areas
 - e. the above by making an exploratory visit.
4. There are some basic safety rules, never let participants;
 - a. place their faces against the animals
 - b. put their hands in their own mouths after feeding the animals
 - c. eat until they have washed their hands
 - d. sample any animal foodstuffs
 - e. drink from farm taps (other than in designated public facilities)
 - f. ride on tractors or other machines
 - g. play in the farm area.

Field studies

1. Field studies associated with a range of subjects including geography, biology, geology and history may take participants to industrial sites and other urban areas as well as into the countryside and to the coast (see above, [Coastal excursions](#)).
2. The scope of field studies means that the group leaders, who will usually be subject specialists, must also be competent to lead and instruct their participants within urban and non-urban environments at minimal risk.

Residential excursions

1. The minimum ratio is **1 member of staff to every 10 participants**.
2. Issues for the group leader to consider include the following;
 - a. The group should ideally have adjoining rooms with leaders accommodation next to the participants
 - b. The leader should obtain a floor plan of the rooms reserved for the group's use in advance
 - c. There must be at least one leader from each sex for mixed groups
 - d. There must be separate male and female sleeping/bathroom facilities for participants and adults
 - e. The immediate accommodation area should ideally be exclusively for

- the group's use
- f. Ensure there is appropriate and safe heating and ventilation
 - g. Ensure that the whole group is aware of the lay-out of the accommodation;
 - i. its fire precautions/exits (are instructions in English or otherwise clear?)
 - ii. its regulations and routine
 - iii. and that everyone can identify key personnel
 - h. Security arrangements - where the reception is not staffed 24 hours a day, security arrangements must be in force to stop unauthorised visitors
 - i. Locks on doors must work in the group's rooms but appropriate access should be available to leaders at all times
 - j. There must be drying facilities
 - k. There must be adequate space for storing clothes, luggage, equipment etc, and for the safe keeping of valuables
 - l. There must be adequate lighting - it is essential to bring a torch
 - m. There should be provision for participants with special needs and those who fall sick
 - n. Balconies must be stable, windows secure, and electrical connections safe
 - o. Where possible participants should not be lodged in ground floor rooms
 - p. The fire alarm must be audible throughout the accommodation
 - q. There should ideally be recreational accommodation/ facilities for the group
 - r. The hotel/hostel should be able to meet any particular cultural or religious needs of the group
 - s. There should be an appropriate number of group supervisors on standby duty during the night.
3. Before booking a hostel/hotel abroad, the group leader must confirm it has fire exits and lifts with inner doors and that it meets local regulations.
 4. After arrival at any accommodation it is advisable to carry out a fire drill as soon as possible.

9 Excursions abroad

General

1. Travelling abroad can be hugely rewarding for children, young people and adults alike, but it is important that careful preparation takes place.
2. Much of the earlier advice in this document applies to excursions abroad, but there are some additional factors that need to be considered, not least because the legislation may be different from that of the UK.
3. Group leaders must comply with the council policy on excursions abroad.
4. British Standard 8848 gives good guidelines for group leaders when they are organising excursions abroad, whether organising their own excursions or using a tour operator. Most are incorporated into the Highland Council Guidelines, for further details please contact the Outdoor Education Service by email outdoor.ed@highland.gov.uk.
5. **Any residential excursion abroad, within Europe, that may be deemed sensitive (because of either the venue, country or region or the planned programme) and all residential trips outwith Europe must be checked and authorised at the initial planning stage with the Area Manager.**

Organising your own excursion

1. A head of establishment or group leader may decide to organise a package abroad without the help of an outside body.
2. Package organisers have responsibilities under the relevant UK and EU legislation and directives.

Organising your own transport

1. Group leaders should ensure that drivers taking groups abroad are familiar with driving the coach or minibus in the countries being visited and those en route.
2. EC regulations require the fitment and use of a tachograph and prescribe maximum limits on driving time and minimum requirements for breaks and rest periods.
3. Groups must not take their minibus abroad unless it is fitted with the appropriate tachograph.
4. These regulations apply for most drivers of passenger vehicles when undertaking an international journey.
5. Different licence requirements would normally apply for driving abroad. The [Transport Commissioner for Scotland](#) can provide advice on the relevant transport legislation.
6. Factors to consider when travelling abroad include;
 - a. the need to be aware that different legislation and regulations may apply for drivers' hours and record-keeping purposes, particularly in non-EU countries
 - b. EU drivers' hours and tachograph regulations normally apply to any vehicle with 9 or more passenger seats on journeys through EU countries and some countries outside the EU. In other countries, drivers must observe the domestic rules of the countries being visited
 - c. special documentation is required for minibuses taken abroad
 - d. all group members must be aware of unfamiliar right-hand drive traffic
 - e. the passenger doors on UK minibuses and coaches may not open on the

kerb side in countries where travel is on the right hand side of the road.
Extra care will be necessary when the group is climbing in and out of the vehicle. Detours may be necessary to ensure safety

- f. carrying capacity and loading requirements
7. Refer to '[Driving in other countries](#)' on the Directgov web site

Using a Tour Operator

1. Before using a tour operator group leaders must ensure it is reputable. Ascertaining this will form part of the risk assessment.
2. BS 8848 provides a rigorous standard for organising and managing visits, fieldwork, expeditions, and adventurous activities, outside the United Kingdom; ask your tour operator if they operate to this standard.
3. The Civil Aviation Authority licenses travel organisers and tour operators selling air seats or packages with an air transport element (Air Travel Organisers Licence or ATOL). The licence is a legal requirement and provides security against a licence holder going out of business.
4. A travel agent does not need to be an ATOL holder if acting only as an agent of an ATOL holder. But if so the group leader must check whether or not the whole package being supplied is covered by ATOL. If it is not, the organiser must show evidence of other forms of security to provide for the refund of advance payments and the costs of repatriation in the event of insolvency.
5. There are seven bonding bodies approved by the Department of Trade and Industry: Association of British Travel Agents (ABTA) Federation of Tour Operators Trust (FTOT) Association of Independent Tour Operators Trust (AITOT) Passenger Shipping Association (PSA) The Confederation of Passenger Transport (CPT) Yacht Charter Association (YCA) The Association of Bonded Travel Organisers Trust (ABTOT).

Operators based abroad

1. Directive 90/314/EEC applies to all states of the European Economic Area (EEA). Group leaders may wish to use a package organiser based abroad in an EEA state. If so, they must check that it satisfies the requirements of the national legislation implementing the Directive. Details may be available from national tourist offices or embassies/consulates.
2. The Directgov web site provides information re [package holidays](#).
3. The School and Group Travel Association (SAGTA) is an independent association with a members' code of good conduct and safety rules. All its members are in ABTA.
4. Alternatively, there are voluntary bodies established to promote school journeys, such as the School Journey Association.
5. Heads of Establishments or group leaders who decide to arrange travel independently may also seek the advice and help of the Foreign and Commonwealth Office's (FCO) Travel Advice Unit. The Unit's purpose is to help intending travellers to avoid trouble abroad. It can provide information on threats to personal safety arising from political unrest, lawlessness, violence etc.

Planning and preparation

1. It is good practice to make an exploratory visit to the location.
2. If this is not possible, the group leader must gather as much information as possible

on the area to be visited or the facilities to be used from;

- a. the provider
- b. the Foreign & Commonwealth Office's Travel Advice Unit
- c. other groups who have used the facilities/been to the area
- d. the local authority/establishments/groups in the area to be visited
- e. national travel offices in the UK
- f. embassies/consulates
- g. travel agents/tour operators
- h. The [Suzy Lamplugh Trust](#), a national charity for personal safety, who have produced guidance, including a book called *World Wise: Your Passport to Safer Travel*, a video of the same title, and information on the Internet
- i. the Internet, books and magazines
- j. local contacts.

Staffing the excursion

1. As a minimum, a ratio of **1 member of staff to 10 participants** must apply.
2. However no group should travel without at least two adults.
3. There must be enough adults in the group to cover in an emergency.
4. Mixed gender groups must have at least one male and one female member of staff.

Preparing participants for excursions abroad

1. Factors to consider for excursions abroad include;
 - a. language - particularly common phrases
 - b. culture e.g.
 - i. body language
 - ii. rules and regulations of behaviour
 - iii. dress codes
 - iv. local customs
 - v. attitudes to gender etc
 - c. drugs, alcohol-usage
 - d. food and drink - group members should be warned of the dangers of drinking tap water in certain countries
 - e. In some countries it is safer to drink bottled water, and care needs to be taken with;
 - i. raw vegetables
 - ii. salads and unpeeled fruit
 - iii. raw shellfish
 - iv. underdone meat or fish
 - v. teeth cleaning and hygiene, etc.
 - f. money - how to carry money and valuables discreetly e.g. money belts, zip armlets
 - g. If larger amounts of money will be needed, it is advisable to take travellers cheques
 - h. how to use phones abroad and the code for phoning home
 - i. what to do in an emergency. See [Emergencies](#) in this section, and Section 10 [Emergency Procedures](#).

Briefing meeting for parents

1. It is particularly important that parents are given the opportunity to meet the leaders

and others who will be taking the participants overseas. See Section 5 [Communicating with Parents](#).

Vaccinations

1. The group leader must find out whether vaccination is necessary and ensure that all members of the group have received it in good time.
2. Check whether the country to be visited requires proof of vaccination.
3. The [Department of Health](#) gives advice on vaccination requirements on their web site.

Insurance

1. The group leader must ensure that the group has comprehensive travel insurance using the Council Scheme. See also Section 7 [Insurance](#).

Foreign legislation

1. The group leader must check relevant legislation, particularly on health and safety e.g. fire regulations.

Language abilities

1. One of the adults with the group should be able to speak and read the language of the visited country. If not, it is strongly recommended that the leader or another adult learns enough of the language to hold a basic conversation and knows what to say in an emergency.
2. If this is not possible, then the services of a local courier should be obtained.
3. It is also advisable that participants have a basic knowledge of the local language before the excursion.

Visas/passports

1. The group leader must ensure that all members of the group have valid passports and visas (if appropriate) in the early stages of planning the trip.
2. A group passport may suffice in certain circumstances.
3. Photocopies of the group's passports should be taken for emergency use by the group leader. Otherwise there can be problems if someone other than the group leader has to accompany a participant back to the UK. A copy of this information should be kept at the base in the UK.

Nationality

1. If the group includes participants whose national or immigration status or entitlement to a British passport is in doubt, it is advisable to make early enquiries of the Home Office's Immigration and Nationality Directorate concerning the requirements of the immigration rules and the right of re-entry.
2. Participants who are not nationals of any EU member state may need a visa to travel from the UK to another member state. However, they may receive visa exemption if they are members of a recognised group.
3. Details and forms are available from the Central Bureau for Educational Excursions and Exchanges.

4. Participants other than EU nationals may require a separate passport and may need to use separate passport control channels from the rest of the group.

Looked after children

1. If a participant is a 'Looked After Child', foster parents will need to ensure that the Social Work Service consents to any proposed trip.
2. If a participant is subject to a supervision requirement, the head of establishment must seek legal advice in relation to journeys and activities abroad **well** in advance.

Emergency Medical Facilities

1. Some of these are available through reciprocal health care arrangements in European Community (EC) countries to EU Nationals.
2. Ensure that each participant has a European Health Insurance Card
3. Photocopies of each EHI Card should be taken on the excursion and a copy held back at Base.
4. It is essential to take a contingency fund as sometimes treatment must be paid for in advance and money has to be claimed back later.

Paperwork

1. The group leader must ensure that they obtain and take with them;
 - a. travel tickets, passports and visas. It is also advisable to carry a separate list of the numbers of any travel documents/passports/EHI Cards, and photocopies of all the group's documents in a sealed waterproof bag
 - b. a copy of the contract with the centre/hotel etc.
 - c. medical papers e.g. EHIC's and significant medical histories
 - d. parental consent forms and permission for group leader to authorise emergency treatment on parental behalf
 - e. the phone numbers and addresses of all emergency contacts
 - f. the names of parents and the addresses and telephone numbers at which they can be contacted (home and workplace)
 - g. copies of a list of group members and their details
 - h. details of insurance arrangements and the company's telephone number
 - i. the name, address and telephone number of the group's accommodation
 - j. location of local hospital/medical services
 - k. the group leader may wish to ask parents for passport size photographs of the participants. It might be useful to have photographs of the adults in the group as well
2. Full details of the excursion must be retained by the base contact while the excursion is in progress, this must include;
 - a. the itinerary and contact telephone number/address of the group
 - b. a list of group members and their details
 - c. contact names, addresses, telephone numbers of the parents and next of kin
 - d. copies of parental consent forms
 - e. copies of travel documents
 - f. insurance documents, medical papers
 - g. a copy of the contract with the centre/hotel etc, if appropriate
 - h. Council emergency 24/7 contact numbers
 - i. a copy of the contingency/emergency plan for the excursion.
3. It is the head of establishment's responsibility to ensure that this information is

available at all times. This is particularly important if the excursion takes place when the establishment is closed.

During the excursion

1. It is advisable for participants to carry a note in the relevant foreign language for use if they get lost, asking the reader to re-unite them with the group at the accommodation/meeting point, or to take them to the police station. They should also carry the group leader's name, home phone number and the Council 24/7 contact details.
2. All group members should carry an appropriate amount of foreign currency at all times e.g. money for telephone (or a phone card).
3. It is important to be able to identify group members readily e.g. uniform, brightly coloured back-pack, cap or item of clothing, badges. However, no-one should display their name clearly on their clothing - this could result in their being isolated from the group by an apparently friendly, personal call.

Emergencies

1. The group leader must ensure that all members of the group know what action to take if there is a problem. This is best anticipated through the production of a contingency plan for the excursion.
2. The group leader and supervisors must know where the nearest British Embassy or Consulate is located and the telephone number. Depending on the age of the participants, it may be appropriate to ensure that they have this information to hand.
3. Group leaders need to be aware that some diseases are more prevalent in some countries than in others and should know what action to take should a member of the group become infected.
4. Many of the health problems of participants on longer excursions are caused by lack of food, of liquid or of sleep. The group leader must take this into account at the planning stage and take measures to prevent these risks.
5. If appropriate, parents should be asked to provide suitably factored sun protection creams and sun hats/glasses.
6. Group members should be advised about the dangers of over-exertion in the heat and of dehydration, which can cause headache, dizziness and nausea.
7. In warm climates it is important to keep fluid levels high, take extra salt and wear loose, lightweight clothing - preferably made of cotton or other natural fibres.

Contacts at home

1. It is advisable to have a contact at home with a valid passport, who could go to the area being visited to provide support to the group in the event of an emergency.

Travel by air

1. Taking a group on an aircraft requires careful planning and preparation.
2. The airline/travel agent will be able to advise on particular requirements.
3. If the group includes any members with disabilities, it is advisable to check that the airline has a wheelchair service and lifting facility etc.
4. The group leader must resist any attempt by the airline to split the group between different aircraft.

Exchange excursions in the UK or abroad

1. The success of an exchange excursion largely depends on good relationships and

- communications with the partner group.
2. Individual group exchanges differ from other excursions abroad in that participants will spend most of their time with host families and are, therefore, not always under the direct supervision of group leaders/staff.
 3. Host families will not be subject to Scots law.
 4. Participants must be aware of the ground rules agreed between the group leader and the host family.
 5. Many of the considerations which apply to residential and day trips also apply here. In addition, the following should be ensured by the group leader;
 - a. a good personal knowledge of the host group and counterpart
 - b. satisfactory 'pairing' arrangements. The partner group should tell the host families of any special, medical or dietary needs of their guests, age and gender
 - c. participant matching should be appropriate
 - d. parents, participants and the host group should be clear about the arrangements for collecting and distributing participants to families, and for transporting participants throughout the excursion
 - e. the head of establishment should retain a list of all the children involved and their family names and addresses
 - f. participants living with host families should have easy access to their group leaders, usually by telephone
 - g. parents should be made aware that their children living with host families will not always be under direct group leader-supervision. The names of host families and their contact details must be provided for all parents.
 6. Please refer to the [Home Stays \(Exchange Visits\)](#) section for further information and details regarding vetting host accommodation.

10 Emergency Procedures

School Trips

The following information is taken directly from the '[School Emergency Initial Response Plan](#)' dated July 2008, a copy of which will be held at every school.

Please refer to your copy or the sample provided on the Off Site Excursions web page for full details.

What follows is given in the way of guidance for the initial response to an emergency during a school trip. This may need to be adapted to suit the situation.

Each adult member of the party should hold a copy of this guidance.

1. Establish the nature and extent of the emergency.
2. Call the appropriate **Emergency Services** (all adults in the group should have previously been briefed on how to contact the emergency services for the country which they are in) and ascertain any additional contact numbers for future calls. Try not to rely solely on mobile phones.
3. Decide who is in charge and **allocate responsibilities** to each adult member of the group.
4. **Make sure all members of the party are accounted for.**
5. Establish the names of any casualties and get immediate **medical attention**. Produce European Health Insurance Card, if appropriate.
6. Ensure, if possible, that a teacher accompanies casualties to hospital with any relevant medical information. If there is only one adult at the site he/she must remain with the uninjured pupils.
7. Ensure that all group members who need to know are aware of the incident.
8. Ensure that remaining pupils are supervised and arrange for a return to base as early as possible.
9. Arrange for an adult to remain at the site of the incident to liaise with the emergency services until the incident is over.
10. Contact **Head or Principal Teacher** acting as school contact and link between the group and **Area ECS Service**. Give full details of the incident, including:
 - a. Name of person making call
 - b. Nature, date, location and time of the incident
 - c. Names of person(s) injured / taken to hospital
 - d. Actions taken so far
 - e. Contact telephone number(s)

11. Ensure the British Embassy / Consulate has been informed if the emergency has occurred abroad.
12. No member of staff or pupil should discuss matters with the media. Refer media enquires to the **Council [Public Relations](#) team.**
13. The party leader should, at the first opportunity, **make notes on the incident**, as should all other staff involved. A record should be made of the names & addresses of any witnesses or people out with the party who were involved.
14. Legal liability must not be discussed.

Accident Reporting and Investigation

To view Highland Councils policy re 'Accident Reporting', click [here](#)

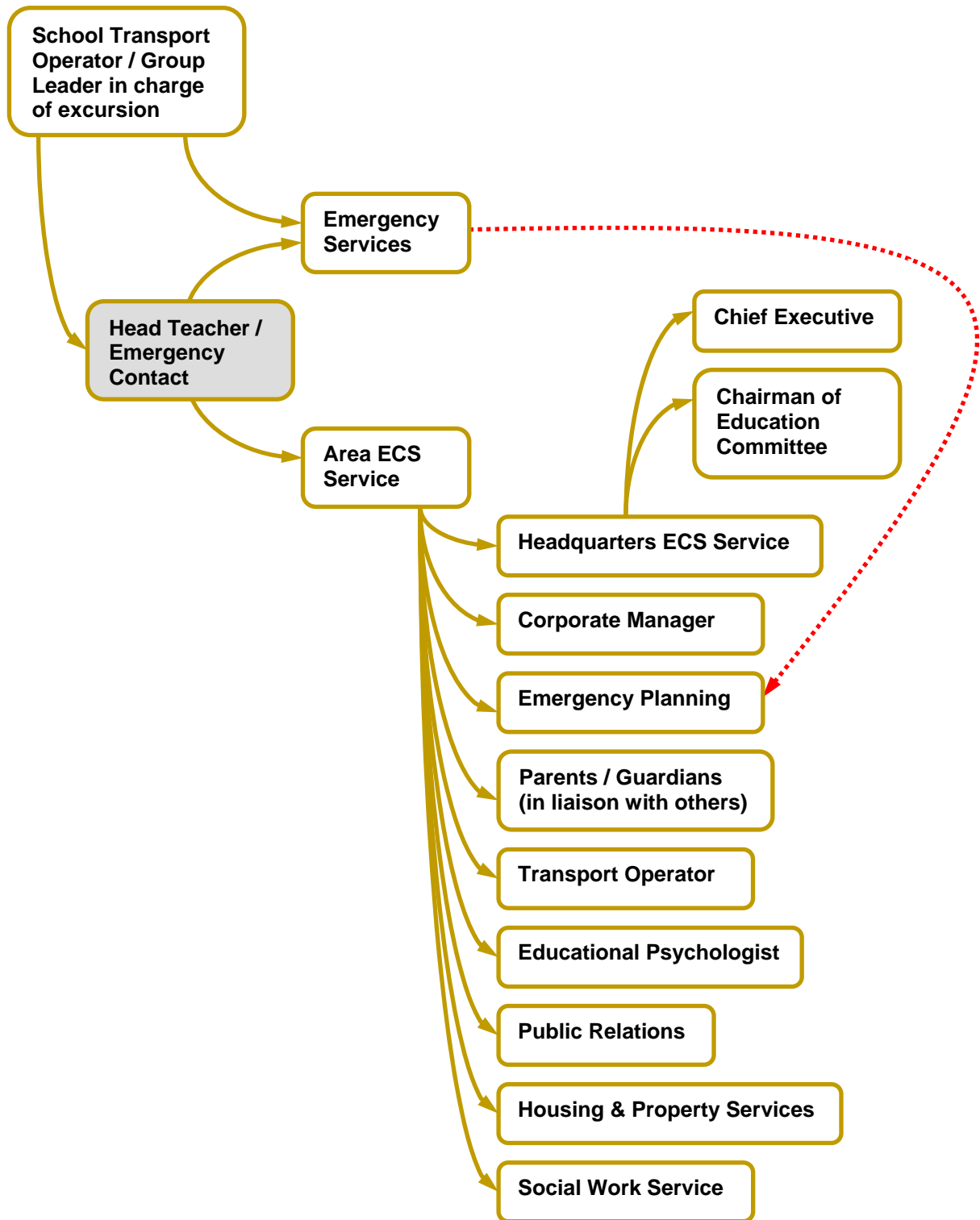
To view Highland Councils 'Guidance Notes for the Reporting of Accidents, Incidents and Occupational Ill Health', click [here](#)

To view a copy of the 'Accident Report Form', click [here](#)

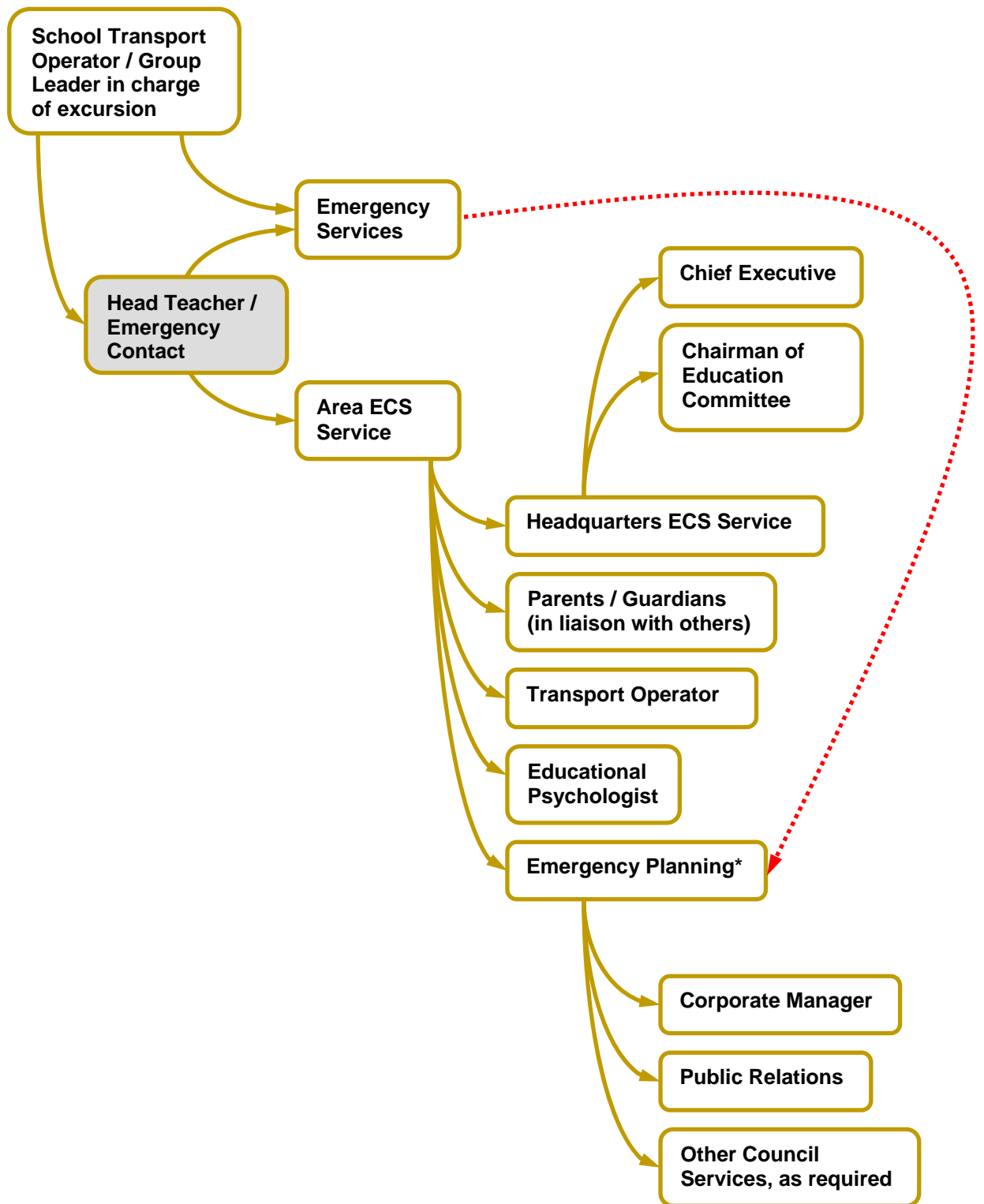
To view a copy of the 'Personal Accident Report Form', click [here](#)

If an incident/accident occurs during the provision of adventurous activities please refer to the [Outdoor Education Safety Document](#) where guidance on reporting and investigating incidents/accidents is provided.

Response to an Emergency during Office Hours



Response to an Emergency out with Office Hours



11 Further Reading

Health and Safety Executive

[Some of the guidance on educational visits](#)

[Information about Adventure Activities Licensing](#)

[Avoiding ill health at open farms](#)

[Five Steps to Risk Assessment](#)

[Managing Health and Safety: Five Steps to Success](#)

[Managing Health and Safety in Swimming Pools](#)

[Reducing Risk Protecting People](#)

[What is RIDDOR?](#)

Others

[The Administration of Medicines in Schools](#) - Scottish Executive Education Department

[For guidance on Farm Visits](#), - Scottish Executive website

[Work Experience](#): Some case studies

[Health Advice for Travellers](#) Department of Health

[Safe Practice in Physical Education](#) - The British Association of Advisers and Lecturers in Physical Education

[Water Safety for children and young people](#) - RoSPA

[Ice Safety](#) - RoSPA

[Safe Supervision for Teaching and Coaching Swimming](#) – British Swimming

[Group Safety at Water Margins](#) - Central Council for Physical Recreation

[Minibus Safety: A Code of Practice](#) - RoSPA and others 2008

[Safe and Responsible Expeditions](#) and [Guidelines for Youth Expeditions](#) - Young Explorers' Trust

[Expedition Handbook](#) – Royal Geographic Society

[The Duke of Edinburgh's Award](#) has its own clear structure, procedures and guidelines

Quality, Safety and Sustainability - Field Study Centres: A Code of Practice - [National Association of Field Studies Officers](#)

[The Waterways Code](#) - British Waterways

[The Suzy Lamplugh Trust](#) has produced a range of guidance on personal safety, including booklets, videos and training courses.

Address details for listed Government publications

The Stationery Office
Scotland Bookshop
71 Lothian Road
Edinburgh
EH3 9AZ
Tel: 0870 606 5566
Fax: 0870 606 5588
www.tso.co.uk

HSE Books
PO Box 1999
Sudbury
Suffolk CO10 6FS
Tel: 01787 881165
Fax: 01787 313995
www.hsebooks.com

HSE priced publications are also available from The Stationery Office and good booksellers.

Government Departments

Scottish Government Education Department
<http://www.scotland.gov.uk/Topics/Education>

Department for Transport
Great Minster House
76 Marsham Street
London SW1P 4DR
Tel: 020 7944 8300
www.dft.gov.uk

The Foreign & Commonwealth Office's Travel
Advice Unit
Consular Directorate
Old Admiralty Building
London SW1A 2PA
Tel: 0870 6060290
(Mon-Fri 9.30 - 16.00 hours)
Travel advice notices and leaflets are available on BBC2 Ceefax pages 470 onwards
and on the internet at www.fco.gov.uk

Health and Safety Executive
Health and Safety Enquiries and contact numbers for Local HSE Offices available
from:

HSE Info line

Tel: 08701 545500

or write to:

HSE Information Centre
Caerphilly Business Park
Caerphilly CF83 3GG

www.hse.gov.uk

Home Office

Immigration and Nationality Directorate

Lunar House

40 Wellesley Road

Croydon CR9 2BY

Tel: 0870 606 7766

www.ind.homeoffice.gov.uk

12 Example forms for Educational Excursions

The following are a range of examples designed to aid the planning, consent, organisation and communication process associated with excursions.

Excursion checklist	An example of an excursion checklist
Head of Establishment's checklist	Heads of Establishments' checklist for excursions
Group Leader's checklists	Group Leader's checklist for excursions - general
	Group Leader's checklist for excursions – day or part day
Participants checklist	Checklist for children and young people attending excursions
Parents checklist	Consent form/Checklist for Parents of children and young people attending excursions
Consent forms	An example of a school excursion consent form
	An example of a parental consent form for an extended excursion
	An example of a Health & Medical consent form
	An example of instructions for long/short term administration of medicines, provided by a parent.
	An example of an Allergy Information request
	An example letter following receipt of an incomplete health & medical consent form
	An example of a pupil and parent agreement - for a school excursion to Russia
	An example of Contingency Planning for a local school excursion
Contingency plans	An example of a contingency plan for a local school excursion
	An example of a contingency plan for an extended excursion
	An example of how to deal with an

	emergency on an extended excursion
Evaluation Form	An example of an excursion Evaluation Form

An example of an excursion checklist

Please complete and return a copy seeking outline permission for an excursion to the head of establishment		
Teacher in Charge		
Purpose of Excursion		
Details of Excursion		
Departure		
Return dates/times		
Destination(s)		
Contact number(s)		
Travel arrangements and routes planned (if appropriate)		
Equalities impact assessment – does the planned excursion require any reasonable adjustments with regard to the DDA, to ensure full participation?		
Permission slips issued & returned? YES NO		
List of participants taking part		
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
Mobile phone number of Teacher in charge		
Staff taking part		
Permission granted	Signed	Date

Heads of Establishments' checklist for excursions

Have I ensured that the following are in place?

- adequate child protection procedures are in place for the excursion
- all travel arrangements comply with Highland Council guidelines
- the risk assessments have been completed, or, in the case of an external provider assurances received that they have been done, and appropriate safety measures are in place
- training needs have been assessed by a competent person and the needs of the staff and participants have been considered
- the group leader has experience in supervising the age groups going on the excursion and will organise the group effectively
- the group leader or another teacher is suitably competent to instruct the activity and is familiar with the location/centre where the activity will take place.
- the group leader has been allowed sufficient time to organise the excursion properly
- non-teacher supervisors on the excursion are appropriate people to supervise children
- the ratio of supervisors to participants is appropriate
- where necessary others within Highland Council have approved the excursion e.g. Outdoor Education and/or AEM /CLLM
- parents have signed consent forms and given all appropriate and necessary information especially that relating to medical or special needs of participants
- any reasonable adjustments with regards the DDA have been made to ensure full participation
- arrangements have been made for the medical needs and additional support needs of all the participants
- adequate first-aid provision will be available
- a detailed itinerary, including pick-up and drop-off points, has been prepared and issued; including arrangements for delays, an early or late return
- there is adequate and relevant insurance cover
- the address and phone number of the excursion's venue is available and I have a contact name
- I or my nominee is the 24/7 contact and the group leader has full contact details
- there is an emergency plan
- the group leader, group supervisors and myself or my nominated 24/7 contact have a copy of the agreed contingency plan and related emergency procedures
- the group leader, group supervisors and myself or my nominated 24/7 contact have the names of all the adults and participants travelling in the group, and the contact details of parents and the teachers' and other supervisors' next of kin, emergency contact details, etc. as well as originals and copies of all relevant forms, EHI Cards, passport numbers, etc for all members of the party
- familiarisation with the laws and customs of the visited country appertaining to children and their supervision has taken place

Group Leader's checklist for excursions - general

Are the following in place before the excursion?

- I have the head teacher's prior agreement (before any off-site excursion takes place)
- I have read Highland Council guidelines and policies in preparing for the excursion
- a deputy party leader has been appointed for extended excursions
- each group supervisor's role has been clearly defined and all tasks have been assigned
- I am suitably competent to lead, discipline and instruct participants involved in the excursion
- I have carried out an exploratory visit and familiar with the location / area where the excursion and its related activities will take place
- I am aware of child protection issues and have ensured all volunteers have been properly vetted
- I have ensure that adequate first-aid provision will be available
- I have undertaken and completed the planning and preparation of the excursion including the briefing of group members and parents; the briefing of participants
- I have undertaken and completed a comprehensive excursion risk assessment
- I have ensured that teachers and other supervisors are fully aware of what the proposed excursion involves; its educational aims and objectives
- I have enough information on the participants proposed for the excursion to assess their suitability
- I am satisfied that reasonable adjustments with regard the DDA have been made to ensure full participation where possible.
- I have ensured the ratio of supervisors to participants is appropriate for the needs of the group
- I will consider stopping the excursion if the risk to the health or safety of the participants is unacceptable and have in place procedures for such an eventuality
- I have ensured that group supervisors have details of the 24/7 contact
- I have ensured that group supervisors and the 24/7 contact have a copy of the contingency plan including details of emergency procedures
- I have ensured that the group's teachers and other supervisors have the details of participants' special educational or medical needs which will be necessary for them to carry out their tasks effectively
- I have sufficient contingency funds to deal with emergencies
- I have and will observe the guidance set out for group leaders in Highland Council's 'Off-Site Excursions' procedures and guidelines
- I am aware, as far as is possible, of the laws and customs relating to children and young people and child protection in the host country, area to be visited
- I have ensured that all members of the group understand and agree to the code of conduct for our excursion

Group Leader's checklist for excursions – day or part day

Have I ensured that the following procedures are in place?

Planning

- Plan a local excursion / day excursion to meet the agreed aims and capabilities of group members
- I am satisfied that reasonable adjustments with regard the DDA have been made to ensure full participation where possible.
- Obtain outline approval for the excursion from the head of establishment
- Make an exploratory visit to the intended area
- Name the Group leader and other party members (staff, volunteers, etc.)
- Use Form No.1 or No.2 to help with the planning
- Costs, moneys involved - liaise with the establishment office to set up appropriate account
- Arrange relevant transport
- Prepare Information sheets with consent forms for participants and parents
- Keep the head of establishment informed on progress to date

Before the excursion

- Prepare a contingency plan to cover any emergencies, including medical
- Check / make First Aid arrangements
- Check / carry out a Risk Assessment for the excursion
- Obtain all necessary consent forms together with necessary medical information
- Inform all other staff in advance (if excursion takes place during the working day)
- Prepare work for classes being covered
- Leave related work for any participants not attending the excursion
- Liaise with the establishment office regarding transport, moneys, arrangements
- Prepare and leave pupil contact list, full itinerary details, name of local contact for excursion, relevant mobile phone numbers, appropriate medical information, etc.
- Inform establishment office of any absent participants from excursion list
- Keep the head of establishment informed on progress to date

During the excursion

- Carry out excursion, maintain discipline
- Constantly monitor any risks throughout the excursion
- Be prepared to stop the excursion immediately should there be any threat to the health and safety of members of the group
- Keep log or notes on excursion
- If delays or changes occur to the planned excursion, inform the 24/7 contact and enact contingency plan for early return/delays/ transport/medical problems

After the excursion

- Liaise with the establishment office over necessary tidy up accounts, transport, etc.
- Review the excursion and amend Risk Assessment as appropriate

Checklist for children and young people attending excursions

Title of Excursion:	Group Leader:
Deputy Leader:	Date and duration of the excursion:
Destination(s):	

For the excursion – do I know the following?

- Why the excursion is taking place?
- Who will be in charge of me during the excursion?
- Where I am going on this excursion?
- What to wear for the excursion?
- What special clothing, footwear, equipment, etc. I may need for the excursion?
- Whose instructions I must follow whilst taking part in the excursion?
- What special safety precautions will be in place for the excursion?
- What to do if I am approached by anyone from outside the group?
- The rendezvous procedures for the excursion
- What to do if I am separated from the group?
- How to contact the Group Leader during the excursion?
- What to do in the event of an emergency during the excursion?
- What instructions I have been given about my conduct and behaviour for the excursion?
- If I have handed in my consent forms for the excursion?

For extended excursions including those abroad – do I know the following?

- Who will be in charge of me when I am travelling during the excursion?
- Who will be in charge of me where I am staying?
- The name and address and telephone number of the place(s) I shall be staying during the excursion?
- How to make contact if help is required? What telephone numbers are required, etc.?
- What to do if I am worried or unhappy about anything while I am staying during the excursion?
- About any necessary security or safety arrangements needed during the excursion?
- About the Fire Safety arrangements for the excursion?
- How to behave where I will be staying?
- The code of conduct for the excursion?
- The arrangements made for the security of my money and valuables

Signed _____ **Pupil** **Date** _____

Consent form/Checklist for Parents of children and young people attending excursions

Title of Excursion :	
Group Leader :	Deputy Leader :
Date and duration of the excursion :	
Destination(s) :	

For the excursion – Have I ensured that?

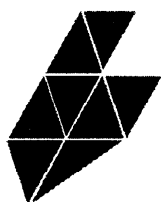
- I understand the purposes of the excursion
- I have completed all necessary & requested documentation for the excursion
- Staff are fully aware of any health / personal problems which might affect my son or daughter during the excursion
- My son / daughter fully understand his / her responsibilities for the excursion?
- My son / daughter fully understands the code of conduct and how they are expected to behave during the excursion
- I know whom to contact if there is an urgent need to get in touch with my son / daughter?
- I have a complete information guide including details of the entire itinerary and timetable for the excursion
- I have a copy of the relevant insurance document for the excursion?
- I know whom to contact if I have any concerns about my son / daughter during the excursion
- My son / daughter is appropriately equipped for the excursion

Signed _____ Parent

Signed _____ Parent

Date _____

An example of a school excursion consent form



**The
Highland
Council**
Comhairle na
Gaidhealtachd

**GLEN URQUHART
HIGH SCHOOL**



**DRUMNADROCHIT,
INVERNESS -SHIRE,
IV63 6XA**

Telephone - 01456 459134
Fax - 01456 459229

Eddie Broadley, Headteacher
Josie Mackenzie, Depute Headteacher

eddie.broadley@highland.gov.uk
josie.mackenzie@highland.gov.uk

Permission Slip for Wednesday 4th. February 2004 Loch Ness Conference 2004

Glen Urquhart High School has been invited to the above conference on Wednesday 4th. February 2004 at Glenmoriston Hall. Fifteen participants have been selected to represent the High School and entertain the gathering through our musicianship.

Participants representing the school should wear **school dress code** for this major event. The participants will travel with Mr Broadley by school minibus leaving at 11.15am and will play for the conference from 12.00noon until 12.30pm. Lunch will be provided for all. Participants will arrive back in school by 2.30pm approx.

Please sign and return the permission slip below. There may be Press coverage of the conference and photos may be taken of participants attending. Please indicate your permission for such photography/publishing of photos below.

If there are any problems please contact Mr Broadley at the school (459134)

Parental permission for the Loch Ness Conference on Wed 4th. Feb 2004

I hereby give my permission for _____ of Class _____ to take part in the Loch Ness Conference at Glenmoriston Hall on Wednesday 4th. February 2004.

I have read and am satisfied arrangements made for the practice.

I give/do not give permission for photos of the above pupil to be published as part of the publicity of the awards ceremony.

Signed _____ Date _____

Please return this permission form to Mr Broadley by Wednesday 4th. February 2004 at 9.05am

Staff permission for the Loch Ness Conference on Wed 4th. Feb 2004

The pupil will be participating from 11.15am until 2.30pm on Wed 4th. Feb - please sign here to give your permission for the pupil to take part and represent the school only if their work is up to date, their homework is up to date and that you are satisfied with their progress to date

Period 3 class _____ Period 4 class _____

Period 5 class _____ Period 6 class _____

An example of a parental consent form for an extended excursion

Title of the proposed excursion;	
Date;	
Details of the proposed excursion;	
Group Leader;	Depute Group Leader;

General details of the proposed excursion given here to include

- Aims and objectives of the proposed excursion;
- Supervision arrangements being made including first aid cover;
- Outline of proposed activities being arranged including any **adventure related activities**;
- Details of participants eligible to participate in the proposed excursion;
- Details of costs involved and the payment plan (with relevant dates) in the proposed excursion;
- Details of insurance cover arrangements being made;
- The need for consent to participate in the proposed excursion including the **consent from both parents**

For trips abroad

- Current **Passport Number**
- **EHI Card** to be supplied to the Group Leader

Reference to completion and return of relevant Health & Medical Forms including those referring to

- Allergies
- tetanus & polio
- the administration of medicines
- etc.

An example of a Health & Medical consent form

Name of Pupil _____

Date of birth _____

Home address _____

Phone No. (Day) _____ (Evening) _____ (Mobile) _____

Own Doctor _____ Address _____

Emergency contact details (in case parental contact is unavailable for any reason)

Name and Address _____

Telephone numbers of Emergency contact _____

N.H.S. Number _____

It would be most helpful if you could furnish us with details of **any** medical condition of which staff should be aware, especially: asthma; diabetes; epilepsy; allergies; travel sickness; sleepwalking, etc.:

Please give details of any **current medication** taken in connection with the above and how and by whom it is administered

Please give details of any special dietary requirements: _____

You should ensure that cover for tetanus and polio is up to date. Please insert below the approximate date of the last immunisation Date: _____

I understand that in the event of my child requiring medical attention, the group leader will make every effort to contact me. In an emergency, however, I give permission for the group leader to authorise any necessary medical treatment including blood transfusion.

Signatures of parent's _____ Date _____

_____ Date _____

Please return to

An example of the instructions, provided by a parent, for the long and or short term administration of medicines.

Name of Pupil
Name of Medicine
Generic name of medicine
Dose / dosage
Time of day to be taken / given
Signature of Parents
Name of GP / Doctor
Address of GP / Doctor
Contact telephone numbers of GP / Doctor
Today's date is

An example of an Allergy Information request



Director of Education;

Your ref:

Our ref:

Date:

Please ask for:

Telephone

Fax

To: Parents of HRYO members going to Germany (Allergy information request)

Dear Parent

HRYO trip to Germany

I note from the Health Form submitted for your son/daughter that he/she suffers from an allergy. Please fill in the details requested below as fully as possible and return the slip to this office so we can be better informed about your son's/daughter's condition and treatment should it be required.

Thank you.

Yours sincerely

Name of group member:

Allergen(s):

Symptoms:

Treatment:

Is an epi-pen carried?

Please return to:as soon as possible.

An example letter following receipt of an incomplete health & medical consent form



Director of Education:

Your ref:

Our ref:

Date:

Please ask for:

Telephone

Fax

To: Parents of members going to Germany, who returned an incomplete health form.

Dear Parent

HRYO trip to Germany - Health Form

Thank you for returning the Health Form for your son/daughter which had to be completed for the trip to Germany. However, on checking through the forms, I notice you have not completed the approximate date of last immunisation for tetanus and polio. This information is essential and I would be grateful if you could let me know the approximate date as soon as possible.

Yours sincerely

An example of a pupil and parent agreement - for a school excursion to Russia

Please read and sign the following agreement for participants participating in the above school excursion.

Please sign and return the agreement below to Mr No later than

Participants

During the school excursion to Russia I will abide by the following code of conduct at all times

I will

- be punctual at all times
- dress appropriately at all times during the school excursion
- observe the advice given about health and safety at all times
- keep working, training, washing and sleeping areas clean and tidy
- maintain my personal hygiene
- not abuse alcohol
- not abuse tobacco nor any other drug or solvent
- not be involved in any form of violent, racist or criminal behaviour
- not use bad language
- keep in a group of at least three or more at all times
- not wander off alone or become deliberately separated from the group at any time
- respect the laws, custom and culture of the areas visited
- take part in all related activities during the excursion consider removing this line
- eat regular meals, especially healthy foods as much as possible
- respect individual differences and opinions at all times
- inform staff of any concerns I may have for the health & safety of myself & other group members
- enjoy myself!

I understand

- that there must be no sexual relationships during the school excursion
- that staff taking are acting 'in loco parentis' and that I will follow all instructions, advice and house rules at all times

Parents

I / we understand that the above agreement must be adhered to during the school excursion and is essential for the benefit of the smooth running and enjoyment of the excursion.

I / we understand that should there be a serious breach of the above agreement, then any necessary and resulting disciplinary action, including the repatriation of my son / daughter will be my / our responsibility.

This may mean a return home for the pupil involved in such a breach of discipline for which I / we understand and accept responsibility for any additional costs arising including the cost of transport home.

Pupils signature	Date
Parents signature/s	Date

Please return the above agreement to No later than

Sample letter for the host family (Home Stays)

Dear Parent/Guardian,

Thank you for agreeing to be a host family for the forthcoming visit of our exchange partners from _____.

In order to ensure that the trip runs smoothly and safely, I would like to outline your responsibilities, as well as the support available to you in the unlikely event of a problem arising.

As a host family the expectation of Highland Council is that you will undertake the same care which would be expected of a reasonably careful parent.

As you are aware we have discussed and agreed a code of conduct for all participants, and this has been accepted by our exchange partner. It has also been stressed to participants that when your family is hosting them they will be subject to your 'house rules'.

Please ensure that your guest is clear about any house rules and that they find them acceptable.

If your visitor proves difficult and is reluctant to accept your house rules or breaches the code of conduct please do not hesitate to contact any of the staff in charge of the exchange. (Phone numbers attached)

It is important to raise awareness of any problem in the early stages in the hope that it can be dealt with before it becomes serious. If however a serious breach of the code of conduct or a similar breach of the 'house rules' arises (e.g. pupils leaving the house on their own without permission) it is essential that we are alerted immediately.

It has been our experience that the home - stay experience is an enjoyable one for both the host and guest. I hope that this will be the case for you but it is important that you feel confident that we will provide support if this is not the case.

I would be grateful if you would complete and return the attached agreement, confirming that you understand and accept your role as a host.

Please contact me if you have any questions or concerns regarding the visit, and I look forward to meeting with you when our guests arrive on _____.

Yours sincerely

Excursion Leader

Sample pledge for a host family (Home Stays)

As a host parent/family I accept my responsibility to undertake the same care as that of a reasonably careful parent. I know of no reason why any member of my household could place a young person at risk by staying in our home.

I undertake to:

- take all necessary steps to ensure a safe and secure home environment for the visiting pupil
- ensure that the agreed code of conduct is observed and that the school is informed of any breaches of this
- inform the school of any problem of health/diet etc. affecting the visiting pupil
- provide suitable sleeping accommodation as witnessed during the visit to our house
- provide meals as indicated in the programme
- inform the school of any activities, such as those listed below, that are being arranged for our guests. Please tick the boxes that apply and add any others that are not covered;

Activity	Tick Box
Canoeing, river kayaking, rafting	
Sea kayaking, surfing, windsurfing	
Sailing, rowing	
Indoor rock climbing, outdoor rock climbing	
Abseiling	
Caving, weaseling	
Gorge walking, canyoning	
Off road cycling	
Skiing	
Hillwalking, scrambling, mountaineering	
Horse riding	
Sub aqua diving	
High ropes course	
Residential trip away from the main home	

Or others as specified;

Signed: _____ Date: _____

An example of Contingency Planning for a local school excursion

Contingency plan for a local school excursion

The aim of the contingency plan is to set out the initial arrangements for dealing efficiently with an incident involving school participants and/or staff occurring on school transport or during a local school excursion.

The principal objectives of such a contingency plan are:

- to clarify the roles of both individuals and participating agencies through defined responsibilities
- to provide an initial response document
- to ensure procedures are in place and remain relevant and appropriate and, therefore, meet the requirements in order to achieve the aim of the plan

Reference should be made to the 'School Emergency Initial Response Plan' as issued by the Emergency Planning Office

A contingency plan for local school excursions should closely follow the advice contained within the above document.

Contents of a contingency plan for a local school excursion (can be adapted as appropriate to the nature and scope of the excursion) should **include** the following written details;

- Title of Excursion
- Name of the Group Leader (who will carry a copy of the contingency plan on the school excursion)
- The Group Leader's mobile phone number
- The name and contact details of the 24/7 contact
- Dates and duration of excursion
- Destination(s) or itinerary detailed (including contact details at each destination)
- Transport or travel arrangements being used:
 - name of company
 - company emergency contact numbers
 - type of vehicle being used
- Routes being used
- Times of the excursion – departure, arrivals, etc
- Copy of the relevant Risk Assessment for the school excursion
- First Aid arrangements made
- Insurance arrangements made
- Group membership details (including the names, addresses, emergency contact details of each member, relevant medical information, etc.)
- Copy of the briefing given to parents/participants/group members
- Details of contingencies for various scenarios including :
 - Transport breakdown or missed
 - Early or late arrival / return
 - Medical injury or emergency relating to a group member
 - Missing pupil/group member
 - Loss or misplacement of funds, cheques or other relevant moneys

An example of a contingency plan for a local school excursion

Title of Excursion	
Group Leader	Mobile phone no.
Contact details of the 24/7 contact	
Date(s) and duration of excursion	
Destination(s) or itinerary (including contact details at destination(s))	
Transport or travel arrangements being used	
Name of company	
Company emergency contact name and numbers	
Type of vehicle being used	
Routes being used	
Departure of Excursion	Expected Arrival time
Copy of the relevant Risk Assessment for the school excursion attached	
First Aid arrangements made	
Insurance arrangements made	
Group membership details (including the names, addresses, emergency contact details of each member, staff, participants, other adults, relevant medical information, etc.) enclosed as a separate list overleaf	
Copy of the Briefing Notes given to participants/group members anticipating problems	
Copy of Consent Information given to parents in advance of the school excursion enclosed	
Details of contingencies; for various scenarios including - what we will do if the following occur?	
Our transport breaks down en route	
Our transport home has been missed	
An early / late arrival or return takes place	
A medical injury or emergency relating to a group member takes place	
There is a missing pupil/group member	
A loss or misplacement of funds, or other relevant moneys takes place	

Other emergencies arise, e.g.

The Group Leader and the 24/7 contact both have a copy of the following for the duration of the school excursion

- **This Contingency plan including contact details of all Group Members**
- **[How to deal with an emergency on a school excursion](#)**

An example of a contingency plan for an extended excursion

The aim of the contingency plan is to set out the initial arrangements for dealing efficiently with an incident involving participants and/or staff occurring whilst being transported or during an extended excursion.

The principal objectives of such a contingency plan are

- to clarify the roles of both individuals and participating agencies through defined responsibilities
- to provide an initial response document
- to ensure procedures are in place and remain relevant and appropriate and, therefore, meet the requirements in order to achieve the aim of the plan

Reference should be made to Highland Council's ['Emergency response plan'](#)

A contingency plan for extended excursions should closely follow the advice contained within the above document.

Contents of a contingency plan for an extended excursion (can be adapted as appropriate to the nature and scope of the excursion) should **include** the following written details

- Title of Excursion
- Name of the Group Leader (who will carry a copy of the contingency plan on the excursion)
- The Group Leader's mobile phone number
- The Depute Group Leader (who will also carry a copy of the contingency plan for the excursion)
- The Depute Group Leader's mobile phone number
- The name and contact details of the 24/7 contact (who has a copy of the contingency plan)
- Dates and duration of excursion
- Destination(s) and detailed Itinerary (including contact details of each place/stop/overnight stay, etc.)
- Transport or travel arrangements being used: name of company, company emergency contact numbers, type of vehicle being used, etc.
- Routes being used
- Timetable for the excursion including dates, times, location
- Copy of the relevant Risk Assessments for the excursion
- First Aid arrangements made
- Insurance arrangements made
- Group membership details (including the names, addresses, emergency contact details of each member, Passport numbers, copies of EHI Cards, relevant medical information, etc.)
- Copy of the briefing information given to parents/participants/group members
- Details of contingencies for various scenarios including
 - Transport breakdown/Transport missed
 - Early arrival or return/Late arrival or return
 - Medical injury or emergency relating to a group member
 - Missing pupil/group member
 - Emergency funding arrangements
 - Loss or misplacement of funds, cheques or other relevant moneys

An example of how to deal with an emergency on an extended excursion

If an accident happens, the main priorities are to:

- assess the situation;
- safeguard the uninjured members of the group;
- attend to the casualty;
- inform the emergency services and everyone who needs to know of the incident

If an emergency occurs on an extended excursion, the main factors to consider include:

- Establish the nature and extent of the emergency as quickly as possible;
- Make sure all members of the party are accounted for
- If there are any injuries, establish their extent and administer appropriate first aid if you have been trained and are capable. Be aware of the consequences that might follow were you to give incorrect treatment. Have regard to your own safety vis-à-vis blood contact.
- Decide who is in charge and allocate responsibilities to each adult member of the group
- Ensure if possible, that an adult accompanies any casualties to hospital. If there is only one adult at the site he/she must remain with the uninjured group members/participants.
- Arrange for an adult to remain at the site of the incident to liaise with the emergency services until the incident is over.
- Contact Emergency Planning International Telephone Code for the UK then 1463 713479
- Give full details of the incident including
- Name of the person making the call
- Name of the establishment
- Nature, date, location and time of the incident
- Number of persons injured/taken to hospital if known
- Actions taken so far
- Contact telephone number(s)
- Ensure that all group members who need to know are aware of the incident and that all group members are following the emergency procedures;
- notify the British Embassy/Consulate if an emergency occurs abroad;
- Inform the 24/7 contact or their nominee. The contact number must be accessible 24/7 at all times during the excursion.
- Details of the incident to pass on to the 24/7 contact should include:
 - Nature, date and time of incident
 - Location of incident
 - Names of casualties and details of their injuries
 - Names of others involved so that parents can be reassured
 - Action taken so far
 - Action yet to be taken (and by whom)
- Notify insurers, especially if medical assistance is required (this may be done by the 24/7 Contact);
- Notify the provider/tour operator (this may be done by the 24/7 contact);
- Confirm telephone numbers for future calls. Mobile phones, though useful, are subject to technical difficulties, and should not replace usual communication procedures;
- Write down accurately and as soon as possible all relevant facts and witness details and preserve any vital evidence; keep a written account of all events, times and contacts after the incident;
- Complete an accident report form as soon as possible. Contact HSE or Council Management representative, if appropriate;

- No-one in the group should speak to the media. Names of those involved in the incident should not be given to the media as this could cause distress to their families. Media enquiries should be referred to a designated media contact in the home area;
- No-one in the group should discuss legal liability with other parties – this should be done through Highland Council’s Press Officer Gordon Fyfe (Tel. no. 01463 702020)
- The main factors for the 24/7 contact to consider include:
 - Ensuring that the group leader is in control of the emergency and establishing if any assistance is required from the establishment or elsewhere;
 - Liaising with the Emergency Planning Officer (01463 713479)
 - Liaising with the Area Education Manager as appropriate
 - The reporting of the incident using appropriate forms, if necessary. Some incidents are reportable under the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1995 (RIDDOR).

An example of an excursion Evaluation Form

Title of Excursion		Reference Number			
Group Leader:		Depute Group Leader:			
Date and duration of the excursion:					
Destination(s):					
Purpose of Excursion:					
Complete the following table as part of the evaluation of the excursion.					
On a scale of 1 to 5, comment on the following aspects (1 is poor, 5 is excellent)					
	1	2	3	4	5
Effectiveness of arrangements made					
Suitability of the planned itinerary					
Satisfaction with overall conduct of participants					
Quality of residential provision (where appropriate)					
Quality of transport used					
Please describe any particularly positive aspects and give details of any difficulties encountered during the above excursion. Reference should be made to parent, staff and pupil evaluations of the excursion.					
Please make written comment on the following aspects of the excursion:					
Is there any necessity to revise the Risk Assessment for this excursion? Give reasons.					
Are there any Health & Safety issues arising from this excursion?					
Have you any other relevant comments?					
Signed			Date		
Please send a copy of this evaluation form to the head of establishment					