



## **EDUCATIONAL EXCURSIONS AND OFF-SITE ACTIVITIES**

### **A Code of Practice**



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## **PART 1 - OUTLINE**

**Please Note: Procedure Manual 4/01 'Outdoor Learning & Adventurous Activities will be issued following approval from the Education Committee.**

### **1.1 AIMS**

This document seeks to provide guidance and standards to all East Dunbartonshire Council (EDC) staff involved in providing off site educational excursions and activities to young people and children within the authority. It is the intention to encourage trips and activities to go ahead whilst ensuring that suitable planning and competences are in place, which will support both staff and the young people involved. It draws on a wide range of good practice and guidance that are current within Scotland and the UK. This document focuses on off site activities and excursions and is complemented by the updated procedure manual 4/01 'Outdoor Learning & Adventurous Activities - A Code of practice'.

### **1.2 RATIONALE FOR EDUCATIONAL EXCURSIONS AND OUTDOOR ACTIVITIES**

Throughout the UK there have been a number of recent manifestoes launched<sup>1</sup> which pull together a wide spectrum of partners, including government agencies, environmental bodies, teachers, youth workers and outdoor practitioners. These are part of a welcome resurgence in the promotion of providing young people with opportunities for learning outside the classroom. The Scottish Government has stated that 'It is clear, from national and international research, that outdoor learning can contribute significantly to the education and personal development of children and young people and enable them to embrace the challenges of the future<sup>2</sup>.

There has long been a range of recognisable values and outcomes that can be successfully achieved through lifelong, experiential outdoor learning but it has at times been difficult to always fit these aims into timetables and curriculum pressures. Within the context of Integrated Children's Services, and specifically Education, the new Curriculum for Excellence provides an exciting and recognisable framework in which to deliver these activities that should be utilised by stakeholders and practitioners across the Authority. Further reading into the theory, research and delivery of outdoor learning is included in Section 8.

### **1.3 OPPORTUNITY FOR ALL**

It is important that all educational excursions or activities are accessible and suitable for all who may wish to participate, irrespective of their medical needs, physical ability, gender, ethnic origin, religious or social background.

Since 2005, there has been a strengthening of the rights for fair inclusion as defined under the Disability Discrimination Act. There are a wide range of suitable venues or providers that have the skills and facilities to allow access for all. Leaders need to consider the suitability of the providers or venues they wish to use at a very early stage in their planning.

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<sup>1</sup> For example; *Out of Classroom Learning 2006*, *Out of Classroom Learning Manifesto. 2006* and in Scotland '*Taking Learning Outdoors ~ partnerships for excellence*' 2007

<sup>2</sup> *Taking Learning Outdoors ~ partnerships for excellence* - Learning and Teaching Scotland and Scottish Government 2007

## **1.4 LEGAL BACKGROUND**

There are various Acts and Regulations that place requirements and standards upon those providing excursions or activities for young people. Since 1974, with the introduction of the Health and Safety at Work Act, it has been a requirement for all employers to ensure, 'so far as reasonably practicable', the health, safety and welfare of those it employs and anyone who may be affected by their activities. It is the statements within sections 2 and 3 of the Act which provide a duty of care to both staff and the young people with whom we work.

The introduction of the Management of Health and Safety at Work Act 1999 brought, under regulation 3, the requirement for risk assessments. Other regulations cover the care and provision of any work equipment, personal protective clothing, vehicle or insurance requirements.

Following the tragic 1994 accident in Lyme Bay, Dorset, where four young people drowned canoeing, the Young Persons Activity Act was brought in to regulate the outdoor industry. The Adventurous Activities Licensing Authority (AALA) was created to check and license outdoor activity providers to standards laid down by the Health and Safety Executive (HSE). It became a requirement for anyone wishing to deliver certain activities, for those under 18, to hold a license, having proved to the inspectorate that they had in place robust safety management systems, risk assessments and competent staff. School staff delivering activities to their own young people and certain youth clubs was given an exemption from having a licence, though they are still bound to comply with current health and safety law.

There have been various documents produced over the years by the Government and individual Councils relating to educational trips and adventurous activities. In 2004, a new Good Practice Guidance was produced by the Scottish Government (SG) entitled 'Health and Safety on Educational Excursions' and it was shortly followed by three supplements; 'Standards for Adventure', 'Roles and Responsibilities' and 'Guidance for Group Leaders'.

These guidelines have drawn on Scottish Government documents, Health and Safety regulations, East Dunbartonshire's own policies and other nationally recognised documents; all of which are listed in Section 8.

Whilst the legal and regulatory aspect of running excursions can initially appear daunting, it must be remembered that each year millions of young people successfully participate in excursions or activities. Despite some high profile incidents, the vast majority of these excursions take place safely, with the young people and the leaders involved gaining significantly from the experiences they have had.

## 1.5 TERMINOLOGY

The following section sets out the meaning of titles and descriptions within this document.

- **Head of Service:**  
The senior manager who heads up the teams or units within that sector. For example, the Head of Education.
- **Head of Establishment:**  
In a school this would be the Head Teacher. In other departments it would be the manager or person in charge with direct day to day control of the unit or team.
- **Group Leader:**  
One staff member who has overall practical responsibility for the group and excursion during the planning and the delivery stage. (They are normally an EDC employee but, with agreement of the Head of Service, they may be a competent non-employee who is able to work to the EDC standards).
- **Supervisors:**  
Other leaders who assist the Group Leader with the excursion. They may be directly responsible for a part of the overall group at times, but remain under the control of the Group Leader. It can be appropriate to utilise young people as supervisors depending upon their age and skills. Some pupils have had specific leadership training or hold sporting qualifications and can be excellent role models to younger students. Careful consideration must be given to the age and development of the group they are assisting with. See section 4.1 on Supervision for more guidance.
- **Instructor:**  
A leader who has specific competences to teach a particular activity or a defined skill. For example, a canoeing instructor would lead the activity session and be expected to provide a well-run, safe, appropriate session; which may include travel arrangements to and from the venue, first aid skills, environmental awareness and group control. The Group Leader and supervisors would support and delegate to the instructor, where appropriate, but would retain overall responsibility for the group's welfare. In some settings, it may well be that a staff member is the instructor and the Group Leader/Supervisor; e.g. a youth leader qualified to teach skiing.
- **Volunteers:**  
Parents or other suitable leaders who provide limited supervisory assistance on the excursion.
- **Leadership Team:**  
This group comprises of the Group Leader, other supervisors, volunteers & other leaders involved in the delivery and management of the activity or excursions. It may be made up of exclusively school staff or could include the instructors at an activity centre. Whilst there will be differing levels of responsibility within the team, the whole group must work together to ensure safe and high quality outcomes for the young people.
- **Parents:**  
Includes guardians or carers where the latter term is more appropriate.

- **Young People:**  
 The participants or group members, normally under 18, for whom the excursion or activity is being provided. Young people who are over 16 years of age have broader legal rights and, where they have the appropriate capacity and development, a higher expectation of personal responsibility can be assumed. While Heads of Establishments can apportion a degree of flexibility in relation to this age group in general the rules and guidance given in this code of practice should apply. In relation to consent for young people over 16 see the section 4.2 on Consent & Communicating with Parents.
- **Excursions' and 'Off-Site Activities:**  
 Any off-site activity taking place away from the establishment base. This includes day trips, sporting fixtures, cultural events, residential visits in the UK or abroad, pupil exchanges, expeditions of all types and conferences.  
 Work experience is not included in the procedure as this is dealt with through the Work Experience procedure, although many of the references in this document may be useful to staff.
- **Educational Support Officer - Educational Visits and Outdoor Activities (ESO):**  
 The Authority has, as per Scottish Government guidance, an officer who can provide advice and support to staff organising educational excursions and activities. The officer can be contacted at Southbank House.
- **Adventurous Activities:**  
 Activities that contain an obvious recognised element of challenge or risk that is integral to taking part in that activity. For example, rock climbing has commonly accepted levels of risk that are part of the activity, which include overcoming possible fears and the controlling of hazards. Sometimes it can be the environment in which an activity takes place that defines it as adventurous. For example, walking in the local park would not normally be perceived as adventurous but remote trekking in the Scottish Highlands certainly would be. See section 6 for additional information on providing these types of activities. The EDC procedure manual 4/01 '**Outdoor Learning & Adventurous Activities - A Code of Practice**' details the standards that are required to run a range of outdoor activities.
- **NGB Awards:**  
 These are awards run by the National Governing Body (NGB) of that activity or sport, which provide recognised statements of a person's competence. Many of these schemes are recognised by the Health and Safety Executive. A list of appropriate awards for adventurous activities is contained in the procedure manual 4/01 '**Outdoor Learning & Adventurous Activities - A Code of Practice**'.
- **Remote or Indirect Supervision:**  
 These are times on an excursion or activity where young people are not under the direct control of a leader and have the freedom to operate independently. The level of remote supervision will depend upon the age and capabilities of the group members and the situation they are in. For example they may be given freedom to explore a theme park in small groups only checking in with the supervisors every few hours.



## **PART 2 - ORGANISATION**

### **2.1 ROLES AND RESPONSIBILITIES**

The following descriptions give guidance on what would be reasonably be expected of those involved with the planning and delivery of excursions. It is recommended to check other Council documents to understand roles within a wider context, specifically the Council's Health and Safety policies and Child Protection policy.

- **Head of Service:**

- To ensure that the Council's procedures are being followed and successful outcomes are achieved.
- To countersign high profile or high risk activities, ensuring that they have been planned appropriately.
- To monitor, on a yearly basis, a selection of excursions within their service in order to ensure compliance with Council standards and to provide opportunities to promote good practice and recognise success.
- To provide service support and training, as appropriate.
- To certain high risk activities or excursions.

- **Head of Establishment:**

The Head of Establishment has overall responsibility for the activities or excursions within their establishment. They have to give approval, for what goes ahead and to where, forwarding high risk activities to be countersigned by their Head of Service. They need to be satisfied that sufficient controls and plans are in place to ensure compliance with these standards and any other relevant EDC procedures.

In some establishments, it is reasonable to delegate the organisation and supervision of all excursions to a senior member of staff. Although this can allow for more time to be spent assisting and monitoring the excursions, the overall accountability for the outcome, approval and ownership cannot be delegated, as defined in the **Corporate Risk Management Strategy**.

They must:

- Ensure that a suitably competent Group Leader, as per the Group Leader requirements, has been selected for the specific excursion or activity: this may include a deputy, where appropriate.
- Be satisfied that the activity and venue is suitable for all those who may be taking part, including any staff.
- Ensure that those involved have understood and followed all relevant Council procedures.
- Provide support and resources to enable the Group Leader to plan and manage the trip sufficiently. This may include additional training.
- Ensure that the Group Leader and other supervisors or volunteers are fully aware of what the visit involves, including any significant risks, and their own responsibilities. This would include knowledge of any medical or support needs within the group that would be necessary for them to know in order to carry out their roles.

- Ensure that a risk assessment has been undertaken and that any control measures are in place.
- Ensure that adequate First Aid provision is in place.
- Ensure that parents have been correctly informed about the trip and that consent has been given.
- Ensure that the young people have been suitably prepared for the excursion, including any pre-excursion training.
- Monitor and review excursions to ensure that successful outcomes are achieved, that good practice is promoted, that success is acknowledged and that any lessons learnt are documented.

- **Group Leader:**

As the staff member who has responsibility for the main planning of the excursion and for the group whilst on an excursion or activity, their competence is vital. The Group Leader must:

- Have suitable skills and experience to deal with the particular excursion or activity planned. This may be through sufficient previous experience, recognised training courses or NGB awards.
- Be able to control and lead the particular age and ability range of the group that is participating.
- Have a clear understanding of their roles and responsibilities and be able to implement the relevant Authority guidelines and policies.
- Obtain the appropriate approval from the Head of Establishment before the excursion or activity takes place.
- Ensure that they have enough information to be satisfied that the activity is suitable for all those who may be taking part, including any group supervisors or volunteers.
- Be able to implant child protection procedures.
- Have provided sufficient information to both parents and participants to enable them to make informed decisions about taking part, having clear understanding of their own responsibilities.
- Consider stopping or changing any activity where they have reasonable concerns for the safety or welfare of those involved and have plans for alternatives activities in place.
- Ensure that sufficient information regarding participants, including their emergency contact details, is left with the base contact.
- Ensure that they and any group supervisors have the base contact details, details of the emergency procedures and the know how to activate them. The Group Leader should also have details of the group to hand.
- Report back to the Head of Establishment on return from the excursion or activity.

- **Supervisors or Deputies:**

Supervisors are able to assist and take instruction from the Group Leader when planning and leading the excursion or activity. They may lead a part of the group whilst under the direction of the Group Leader or where they have the required skills. Supervisors must be able to:

- Support the Group Leader in the tasks where they have competence or sufficient experience.
- Understand their role within the leadership team and have sufficient understanding of Council policy to allow them to perform their roles.
- Deputise or coordinate the group in the event that the Group Leader is unavailable or unable to contribute.

- **Volunteers:**

- Should be able to support the Group Leader and supervisors whilst on the excursion to ensure its successful outcome.
- Must follow all directions and guidance from the Group Leader or supervisors.

- **Group Members:**

Individual group members are expected to:

- Follow the instructions given by the Group Leader, other supervisors and instructors who are involved in the activity or excursion.
- Behave and dress sensibly, with respect to local customs or practices.
- Inform the supporting staff of anything that may hurt or threaten them or anyone else within the group.
- Not to take any unnecessary risks themselves.

## 2.2 APPROVAL FOR EXCURSIONS

All educational excursions and activities must be approved by the Head of Establishment. Category 4 activities must also have supporting approval from the relevant Head of Service.

The following matrix categorises the excursions into four sections and demonstrates the process and forms involved.

Category	Activities	Approval and notification
Category 1	<ul style="list-style-type: none"> <li>▪ <u>Curricular</u> activities which take place off site but in the local proximity of the school. E.g. timetabled football practices on a pitch across from the school.</li> </ul>	<ol style="list-style-type: none"> <li>1. Use form <b>EV 1</b>. (see note 1)</li> <li>2. Approval by Head of Establishment.</li> <li>3. Parental Consent is only needed if the young people are working on their own initiative without a teacher or staff member in close proximity (See note 2)</li> </ol>
Category 2	<ul style="list-style-type: none"> <li>▪ Team travel &amp; away games and all <u>extra curricular</u> activities, during or out with school hours.</li> <li>▪ Day excursions or off site activities away from the locality of the school that include hazards normally encountered in daily life. For example, visits to museums, theatres, country parks. (See notes 3+4)</li> </ul>	<ol style="list-style-type: none"> <li>1. Use form <b>EV1</b> (see note 1 &amp; 2)</li> <li>2. Approval by Head of Establishment.</li> <li>3. Parental Consent.</li> </ol>
Category 3	<ul style="list-style-type: none"> <li>▪ All UK residential and overnight visits.</li> <li>▪ All non adventurous overseas visits and exchanges (See note 4).</li> <li>▪ All Adventurous Activities led by EDC approved &amp; AALA licensed outdoor providers (See note 4).</li> </ul>	<ol style="list-style-type: none"> <li>1. Use form <b>EV2A &amp; B</b></li> <li>2. Approval by Head of Establishment.</li> <li>3. Parental Consent.</li> <li>4. Schools must send a copy of <b>EV2 B</b> to Southbank House at least 4 weeks in advance. (See note 5)</li> </ol>
Category 4	<ul style="list-style-type: none"> <li>▪ Overseas expeditions, trekking and Adventurous Activities (See notes 4 &amp; 5).</li> <li>▪ All Adventurous Activities led by EDC staff or volunteers (See notes 4 &amp; 5).</li> <li>▪ Duke of Edinburgh Expeditions (See note 6).</li> </ul>	<ol style="list-style-type: none"> <li>1. Use form <b>EV2 (A &amp; B)</b>.</li> <li>2. Approval by Head of Establishment.</li> <li>3. Parental Consent.</li> <li>4. Schools must send a copy of <b>EV2 B</b> to the Head of Service for their notification, at least 6 weeks in advance. (see note 6)</li> </ol>

**Note 1:**

The Head will need to sign form EV1 for these regular off site activities but a term, block of sessions or a particular site can be assessed and approved on the one form. For example, a school may regularly use a playing field across the road from the school. Its use can be approved and assessed once using form EV1, which can then be kept on file.

**Note 2:**

The establishment can obtain permission from parents for a block of activities or games if they are of a similar nature. For example, a number of sports fixtures. The information letter should contain details regarding the planned venues, transport arrangements, staff involved and emergency contact details. It should also state how changes to fixture or venues will be communicated to parents. This could be via additional letters, the school, website or notice boards. See section 4.2 **Communicating with Parents** and 5.1 **Transport & Travel**.

**Note 3:**

The Head of establishment will need to decide which venues fall into the 'locality' of the school and if parental consent is needed for a specific excursion or whether a block consent can be taken. The use of transport can be a useful indicator but this is not always the case. The spirit of providing sufficient information to parents should be followed rather than drawing a distinct 'locality' line round the establishment.

The Head of establishment can decide to make limited use of combined information and consent letters for local, low risk, regular excursions as set out in the section 4.2 **Communicating with Parents**.

**Note 4:**

EDC has a list of approved providers of adventurous activities. This can be accessed by contacting the ESO. For educational staff with GLOW accounts details can be accessed by logging onto the EDC 'Educational Excursions and Off Site Activities' GLOW group.

Adventurous Activities led by AALA licensed companies have been checked by the inspectors and we are able to pass on a level of responsibility to the organising company who will maintain their safety standards of the activities as per their licence. A list of licensed providers can be checked via the AALA website.

**Note 5:**

Within EDC we need to ensure that high risk activities are run in accordance with our own activity procedures and our AALA licence (Adventurous Activities Licensing Authority). Notification of all Adventurous activities delivered by EDC staff, Duke of Edinburgh expeditions and overseas expeditions must therefore be sent to the appropriate Head of Service. They may liaise with the ESO as necessary to ensure that the activity or excursion is run in accordance with EDC policy.

**Note 6:**

To allow the education department to monitor the outdoor activities, residential and overseas trips that are taking place, schools must:

- Send a copy of form EV2 B to ISS Business Support – A in Southbank House, for **category 3** excursions and activities.
- Send a copy of form EV2 B to the Head of Service, for **category 4** excursions and activities.

## **2.3 EXTERNAL PROVIDERS AND EDUCATIONAL TOUR COMPANIES**

The Group Leader should take steps to ensure that any provider or venue they use is reputable and that they can cater for the group's needs. This will involve requesting some information from suppliers and, whilst the Group Leader is not expected to be an expert in the running of venues or activities, they are expected to seek reasonable assurances and evidence of competence. Advice regarding the use of any venue or provider can be obtained from the Educational Visits Officer (ESO).

For example, there must be evidence of the following or written management statements to same effect:

- Liability insurance of at least £5m.
- Management statements that suitable risk management and emergency planning systems in place.
- Fire and hygiene precautions.
- Child protection and staff vetting policies, where appropriate.
- First aid provision.
- Licences to operate or memberships of relevant trade or governing bodies, where appropriate.
- Financial security or 'Bonding', where appropriate.

Some providers provide safety statements or risk management summaries about themselves that are an efficient method of checking their suitability. The use of any venue or provider is based upon the assessment of the provision they provide and, taking account of the responses they provide, the risks associated with their facility. It will be up to the Head of Establishment to be fully satisfied that any venue or provider is suitable to use.

Obtaining a risk assessment from a provider is not a requirement before a visit, although evidence of risk management from a provider is useful to assess their suitability. The provider is responsible for managing the risk of the activity they deliver and the Group Leader should concentrate on assessing the suitability of the excursion or activity for their group members.

The Group Leader must always remain vigilant that the stated standards of provider remain whilst on the excursion. Post visit monitoring is an important part of the safety chain in this respect as it allows the Council to reassess any providers where issues are highlighted on evaluation forms.

A number of outdoor centres and tour companies have already been audited by the Educational Visits Officer who should be contacted if using one of these providers. If an establishment wishes to use a new provider, then with sufficient notice, the ESO can assist with the checking of a provider or venue.

## **2.4 REVIEWING AND MONITORING**

Reviewing is the process by which leaders and group members can examine the outcomes and processes of excursions and see if the original aims were met. It allows for examples of good practice to be highlighted and passed onto others. Conversely, it will allow for discussion of any incidents or problems that have arisen. By monitoring reports over a period of time patterns can be observed, highlighting minor problems which can be explored by senior staff or the Educational Visits Officer before a more serious situation develops.

After each excursion the Group Leader should report back to the Head of Establishment, to highlight the outcomes of the trip and any issues to consider for future excursions. A pro-forma for reviews is included within Section 7, **Forms**.

The Internal Audit Team or the Educational Visits Officer will periodically select certain trips to monitor the outcomes and check that Council procedures have been followed.

## **2.5 A SUGGESTED PLANNING FLOWCHART**

See below.

## 2.5 A SUGGESTED PLANNING FLOWCHART

- Group Leader appointed and begins initial planning.
- Decide which scope of Approval the trip fits into.
- Advice sought on providers or activity, if necessary.
- Initial consent given by Head of Establishment agreeing, in principle, to excursion.



- Group Leader meets with other staff involved to plan trip in more detail.
- Initial Information sent out to pupils and parents regarding plans.
- Site visit, if possible, and provisionally book suitable provider if using one.
- Use a Risk Assessment to inform the planning.
- Organise Transport, Financial arrangements, First Aid and Medical Requirements, Contingency and Emergency plans
- Seek full approval for trip sought from Head of Establishment and Service, as necessary.



- Send any further information to pupils and parents; possible meeting with provider for parents and pupils if an expedition or residential stay is planned
- Consent forms collated and checked for any unknown issues that may need to be assessed.
- Check if any new information received would affect your Risk Assessment or planning.
- Keep Head of Establishment and the leadership team updated with any new information.



- Ensure that a complete list of actual attendees and staff is left with designated base contact.
- Go on the trip or activity.



- Review outcomes from excursion or activity.
- Pass review sheet to Head of Establishment to allow for monitoring of trips.

- See section 1.5 on **Terminology** and section 2.1 on **Roles and Responsibilities**
- See section 1.3 **Opportunity for All**
- See section 2.2 **Approval** for Excursions
- Contact **Educational Support Officer**
- See section 7 and use form **EV2 Part A** for category 3 & 4 excursions.
  
- See section 4.1 for advice on **'Supervision**
- See section 2.3 if using **External providers**
- See section 3 for **Risk Assessments**
- Section 4 for **Planning and Arrangements**
- Section 5 for **Transport**
- Section 4.2 for **Information to Parents** and 4.3 **Preparing young People**
- Use form **EV1** for category 1 & 2 excursions
- Use form **EV2 Part B** for category 3 & 4 excursions
  
- See Section 7 for **Consent Forms**
- See also sections 4.2 **Communicating with Parents** and 4.3
  
- See sections 4.5 **First aid and Medical requirements**
  
- Section 4.9 for **Contingency and Emergency Planning**
- See section 3.4 for **Dynamic Risk Assessments**
  
- See section 2.4 for **Reviewing and Monitoring** and section 7



## **PART 3 - THE ASSESSMENT & MANAGEMENT OF RISK**

### **3.1 GENERAL PRINCIPLES**

There is a legal requirement, under the 'Management of Health and Safety at Work Act 1999, to assess and manage the risk of the activities that we are leading or taking part in. The Council's Health and Safety Policies set out the requirements for Risk Assessment within EDC.

Heads of establishment must be satisfied that the Group Leader has made a suitable assessment of the significant risks and that any subsequent control measures are put in place for each trip, taking account of the specific activity, group members, venue and environmental conditions.

The HSE booklet titled the 'Five Steps to Risk Assessment' sets out the principles of Risk Assessment using the following five steps:

1. Identify the hazards.
2. Decide who might be harmed.
3. Evaluate the risks and decide on precautions.
4. Record your findings and implement them.
5. Review your assessment and update, if necessary.

When preparing an assessment remember that:

- A *hazard* is anything that may cause harm, such as chemicals, fire, the weather or an exposed path on the hill.
- The *risk* is the likelihood of somebody being harmed by the hazard and is combined with an indication of how serious the injury could be. It can be represented numerically or simply categorised as High, Medium or Low.

Establishments can put regular activities or blocks of similar activity together onto one risk assessments, if the group members and scenarios are similar. For example a block of after school clubs could use the same assessments, as can generic activities that may form part of other lessons, such as cycling. More complicated residential visits, adventurous activities or irregular yearly excursions should be assessed independently. A new assessment should be considered at any time if there are significant changes between excursions or changes in the staffing or group members.

### **3.2 GENERIC ASSESSMENTS**

These are likely to apply to an activity wherever or whenever it takes place or to a venue used by a wide range of groups. The Authority provides Generic Assessments for a range of commonly undertaken activities by establishments. For example, a Generic Assessment of visits to an outdoor centre, a leisure centre or the use of public transport.

There is a number of Generic Assessments to assist Group Leaders which cover a range of common trips. These are available through the Educational Visits Officer (ESO) and the educational excursions Glow group. These forms can be used by establishments as the basis for their own specific assessments.

Any new activity or provider should be assessed and at least 4 weeks notice should be given to the ESO if a new Generic Assessment is to be created.

### **3.3 SPECIFIC ASSESSMENTS - ACTIVITY, GROUP OR VENUE**

These will differ between groups and specific venues and are usually carried out by the Group Leader, in conjunction with the relevant member of the leadership team. They will take account of any significant hazards that relate to the specific trip being undertaken by the group and should complement, not conflict, with any relevant EDC Generic Assessment. For example, one member of the group may have additional support needs or the particular venue may be based on the side of a loch which was not highlighted in the generic outdoor centre assessment. The ESO can assist Group Leaders with this level of assessment but will not have the detailed knowledge of the group or some of the venues being used.

The head of establishment is responsible for ensuring that the Group Leader has assessed the excursion or activity for their specific group and added any additions or amendments to the Generic Assessment.

The Group Leader should assess how the group members will be able to participate in the activity or excursion taking account of any relevant incidents on previous excursions or in the school, their behaviour and personal development, additional support or welfare needs and their interaction with other pupils. The head of establishment should assess the leadership teams' competence and the suitability of the activities for those attending.

It is not always necessary to complete a new form for each trip if the significant hazards are the same, such as the regular use of transport or a repeat visit to a local library. These regular or repeat visits can be assessed once and minor changes reviewed by the leadership team before the excursion.

The group leader must ensure that all members of the leadership team are aware of the contents or involved in the creation of the risk assessment. All leaders and supervisors must be aware of any significant hazards and the control measures that should be followed to reduce the risks.

### **3.4 DYNAMIC OR 'ON GOING' ASSESSMENTS**

Risk assessment is an on going process and the leadership team needs to take account of developments due to changes in the weather, itinerary or incidents. Judgements will be made as the need arises with the Group Leader drawing upon their experience and in-depth knowledge of the group to help in that process, supported by their knowledge of the Generic and specific Risk Assessments. These dynamic processes are not normally written down but should inform any changes to the existing formal assessments.

There should be a post excursion debrief or, if on a residential excursion, an evening review to take stock of the day and make any necessary changes to the ongoing programme. Any significant incidents or alterations should be recorded by the Group leader. A sample daily record sheet is included in section 7.

The Group Leader is always in overall responsibility of their group. This would include challenging an activity instructor where the Group Leader's knowledge of the group is superior, or intervening to change a plan, including stopping an activity if they feel that it is becoming too hazardous.

### **3.5 REVIEWING AND MONITORING**

It is vital that any significant changes 'on the ground' are used to update the written risk assessment. The ESO should be informed of significant issues arising on excursions or activities to allow any review to the EDC Generic Assessments.

### **3.6 EXPLORATORY VISITS**

Whenever possible, the Group Leader should undertake an exploratory planning visit. This will allow them to gain first hand knowledge of the site or activity and help them with the risk assessment and planning.

If it is not possible to visit the venue then the head of establishment must be satisfied that sufficient information has been gathered by alternative means to allow for suitable preparation. This might include speaking to colleagues who have been to the venue, the use of local guides and specialists or on site checking of the facilities once the group has arrived but whilst they are initially confined to one area or resting up.

### **3.7 INVOLVING PARTICIPANTS**

One of the beneficial aspects of outdoor learning is the opportunity to enable participants to develop their own understanding of risk and the experience of dealing with hazards.

Depending upon age and progression, group members should be introduced to the basic principles of risk assessment and control. Care should be taken not to cause undue alarm and Group Leaders should be aware that any involvement in the assessment process does not remove their overall duty of care towards the group members.

## **PART 4 - PLANNING AND ARRANGEMENTS**

### **4.1 SUPERVISION**

Appropriate supervision is one of the most important factors in terms of the safety and welfare of the group. The actual level of supervision should be decided by examining the minimum requirements set out below and a risk assessment of the excursion or activity for that particular group.

Ratios will be reduced due to age, medical conditions, behavioural or support needs, level of staff experience, venue type, or location. It may, for example, become 1:4 or even 1:1 in certain circumstances. The ratios may need to be significantly lower in certain services and Heads of Service may introduce permanent, lower minimum ratios within their own service through consultation with relevant staff, the ESO and the Director of Community Services. For example, a ratio of 1:2 has traditionally existed on Nursery class excursions but the Care Commission guidance gives no exact ratio and instead expects judgements based upon sensible risk assessment.

It will be up to the head of establishment to be satisfied that any staff, leaders or volunteers helping on the trip have the suitable experience or competence to be counted as part of the stated leader ratios or whether they are simply additional help.

The head of establishment must be satisfied, through planning and risk assessment, that the overall supervision is appropriate for the sex, age, additional support needs and type of activity or excursion. For example, it may be acceptable that there are only single sex leaders from the establishment on a primary school trip to an Outdoor Centre but it is unlikely that a single sex leadership team would be appropriate for a mixed sex Secondary school skiing trip. It is common that during a visit to an Outdoor Centre the overnight duty instructor may be included as a supervisor, if they are deemed suitable by the Head of Establishment and following discussion with the provider.

The ratios are lower on specific activities such as swimming, canoeing or hill walking, but this is often catered for by the fact that the main group is often put into smaller activity teams for the duration of the activity times. Refer to the procedure 4/01 **Outdoor Learning & Adventurous Activities** or the PE guidelines for these activities.

When taking part in outdoor activities adult staff or volunteers may be included in the session ratio by the activity provider and the Group Leader should confirm this with the provider. For example, when canoeing a ratio of 1.8 may, during the time on the water, be made up of the total number of participants not just the ratio of young people to the instructor.

- **Matrix of Ratios:**

<b>Category</b>	<b>Summary of Excursions or Activities</b>	<b><u>Minimum</u> Ratio of Leaders to Young People</b>
1	<ul style="list-style-type: none"> <li>▪ Curricular activities which take place off site but in proximity of the school.</li> <li>▪ E.g. programmed football practices on pitch across from the school or regular trips, to local leisure centre for lessons.</li> </ul>	Normal class sizes for an on site activity (see note 1 below)
2	<ul style="list-style-type: none"> <li>▪ Extra curricular organised team games and travel during or out with school hours.</li> </ul>	1: 20
	<ul style="list-style-type: none"> <li>▪ Day excursions or off site activities that only include hazards normally encountered in daily life. For example, visits to museums, theatres, local parks</li> </ul>	1: 12
3	<ul style="list-style-type: none"> <li>▪ All UK residential visits</li> </ul>	1: 12 (see note 2 below)
4	<ul style="list-style-type: none"> <li>▪ All trips abroad</li> </ul>	1:10

**Note 1:**

It is common for schools to use a local playing field or leisure facility to provide part of their PE Curriculum. It is this regular curricular situation that this ratio relates to, not the casual use of off site facilities. The head of establishment must be satisfied that the staff accompanying the pupils can suitably manage them at all times in the facility and the travel to and from it. It should be remembered that the staff at EDC facilities are colleagues who are suitably trained, vetted and follow EDC policies. This may not be the same situation in non EDC venues and advice can be taken from the Educational Visits Officer before using other facilities.

**Note 2:**

It is possible to temporally extend the ratio of a residential group over this number up to 1:20 if travelling on a straightforward coach journey to a residential centre where additional, and suitable staff, will be immediately available to assist with the group. For example, leaving the school grounds to travel directly to an outdoor centre where the group will be met by the centre staff bringing the ratio back to 1:12. Any company coach driver would not normally be included in this ratio as their primary responsibility would be towards their vehicle and driving

- **Young People as Leaders or Volunteers:**

It can be appropriate to utilise young people as supervisors, depending upon their age and skills. Some pupils have had specific leadership training or hold sporting qualifications and can be excellent role models to younger students. Careful consideration must be given to the age and development of the group they are assisting with. For example, an upper secondary school pupil could be an appropriate assistant during a sporting session with lower school pupil from their own school but could not be expected to be a leader for their peers during an overseas skiing trip.

The Group Leader must remain in overall control and retain responsibility for any young people who are assisting them.

- **Supervision at all Times:**

The head of establishment and Group Leader will need to ensure that there is sufficient supervision at all times during the excursion or activity. There should be contingency plans to allow for the unforeseen loss of key staff and the unplanned removal of group members, which could leave the remainder of the group insufficiently catered for

There should be a clear handover of responsibility between leaders, particularly if using instructors to run activity sessions, so not to leave young people unsupervised through miscommunication between establishment staff and activity provider staff.

All 'free time', meals and bed times will need to have adequate supervision. It will be up to the Head of Establishment and Group Leader to assess if it is suitable to include any providers or centre staff in the supervision ratios.

Leaders should be aware that they may be called upon to deal with incident at any time and whilst leaders need to be allowed 'down time' they must be aware of their high degree responsibility during all times of the excursion.

- **Welfare and Additional Support Needs:**

The head of establishment must be satisfied that there is sufficient support from leaders within the leadership team to monitor, assist and support all participants with any personnel welfare need and additional support needs.

- **Alcohol:**

Pupils under 18, the legal age for consuming alcohol in the UK, are not allowed to consume alcohol whilst on any school trip, whether the excursion takes place in the in the UK or abroad. Pupils under 18 who do consume alcohol may be subject to the normal disciplinary procedures of the school.

Whilst some countries set lower ages for the legal consumption of alcohol, schools must follow the UK regulations at all times. The same educational standards apply to the use of drugs, where schools must follow UK law on drug use, not the standards of the country being visited.

Leaders and volunteers should not consume alcohol in front of pupils whilst on school trips.

It is accepted that leaders and volunteers may wish to consume alcohol in their free time, when away from the pupils. Leaders must be aware though of their responsibilities towards the pupils, as the 'responsible adult' at all times. Leaders may be required to undertake their duties, at any time during the trip. This may involve providing pastoral care, assistance in emergencies or to act as drivers of any mini buses or private cars that are being used as part of the excursion.

- **Head Counts:**

Accurate head counts are a very simple and obvious, but sometimes omitted, way of checking that all the group members have been accounted for. Several accidents in the UK have occurred, during activities involving young people, where a reliable head count may have averted the fatal outcomes.

It is recommended to head count just before the group leaves the establishment, and at various stages throughout the excursion or activity. Any time where a transfer of transport occurs or changes in activity and venues are common opportunities for accidental separation.

- **Identification:**

It may be it can be useful and appropriate for group members to wear some form of identification such as coloured hats, schools sweaters or school badges.

Whilst this can assist when doing 'head counts' for example, the Group Leaders should assess how this may affect child protection issues and that the level of personnel identification, such as names, is appropriate to the context of the activity. See section 4.6 **Protection of Children** for more details.

- **Remote or Indirect Supervision:**

This takes place when supervisors allow young people to have varying amounts of time which is not directly supervised by the leadership team. For example, during a visit to a theme park the young people may be allowed to walk around the park in small groups and will have to 'check in' to a member of staff at a pre- determined time.

The level of remote supervision should be decided upon after risk assessment of the groups' age, development, the environment they are in or activity they are taking part in

The young people must know how to contact the leaders at any point and be given very clear behavioural rules and be aware of any 'no-go' areas. Help cards, as highlighted in section 4.3, can be useful and one of the leadership team should carry a work mobile phone at all times as a suitable contact number.

The Group Leader and Head of Establishment must carefully assess the suitability of this type of supervision based upon the group and location. The amount of supervision given should be proportional to the risks associated with the environment and the group members' abilities. Parents must be informed as to the extent of the remote supervision.

- **Remote Supervision on Expeditions and Adventurous Activities:**

When taking part in schemes such as the Duke of Edinburgh Award it is normal to have periods of time when the group members are operating independently from any supervisors. This is integral to the ethos of these schemes.

Remote supervision should be gradually introduced by competent staff through the practice period and sufficient time must be allowed to train and monitor the group and to assess if they have enough skills, experience and judgement to be left without direct supervision.

A training structure should be created and a record of the training delivered must be kept for all the young people as they progress through the programme, to ensure that no team member misses out any elements. The amount of training given should be proportional to the risks associated with the environment or group abilities.

The Group Leader must take care to ensure that the young people themselves fully understand the limits of the freedom they are being given and be aware of the significant

hazards they may encounter. They must know how to contact staff and what to do if lost or separated. It may not be suitable for all groups or scenarios and, as a result, leaders will still need to be located at certain hazards, such as at a river crossing to assist or monitor the group.

If there were two small groups involved in such trips, unless they were in very close proximity, then it would not be practical to have one leader supervising them both. Parents must be informed as to the extent of the remote supervision.

See section 4.3 **Preparing Young People** and the EDC procedure manual 4/01 '**Outdoor Learning & Adventurous Activities ~ A Code of Practice**'. Further guidance regarding supervision on expeditions has been produced by the Duke of Edinburgh Award (D. of E.) and the Mountain Leadership Training Board (MLTB) and the Adventurous Activities Licensing Service (AALS).

## **4.2 COMMUNICATING WITH PARENTS**

- **Information for Parents:**

Parents need to be provided with sufficient information to allow them to make informed decisions about giving consent for their child to attend an excursion or take part in an activity. For all residential and high risk adventurous activities parents should be provided with an opportunity to come to the establishment to discuss the planned trip, which may include a talk from a centre manager or tour operator representative.

The information to parents should include:

- Purpose and outcome aims of visit.
- Details of the planned activities and how the significant risks will be managed.
- Dates, including departure and return times, drop off and pick up locations for the excursion.
- Information regarding the staff or other leaders attending, including their roles and competences to lead the trip.
- The travel plans and modes of travel, particularly if the leader's private vehicles are to be used for which clear consent should be given. See section 5 **Transport**.
- The details of costs, insurance cover and any spending money, including safekeeping responsibilities - see sections 4.7 **Insurance** and 4.8 **Finance**.
- The size of the group and level of planned supervision. In particular, any times when remote supervision may take place or when not under the direct supervision of staff, such as staying with host families on exchanges.
- The clothing, personal items and equipment to be taken. This should include items that should not be taken or brought back.
- Expectations of behaviour which may include a signed Code of Conduct, which covers as appropriate, issues such as alcohol, smoking, drugs, sexual behaviour and general group behaviour.
- Any likely sanctions that may be imposed due to poor behaviour or plans, including any costs, for returning young people home if need be.
- The establishment policy on home communication and for the use of phones by participants whilst away, both mobile and land lines.
- Details of how to contact their child, the establishment and Group Leader at all times, in case of emergencies. This may include setting up a 'telephone tree' system amongst parents for communicating information such as safe arrival or non-serious delays.



- On residential visits sufficient information about the type of facility. For example, any significant differences or standards in overseas accommodation or whether the group will be sharing the venue with other users.
- **Parental Consent:**  
Consent is covered by the Age of Legal Capacity (Scotland) Act 1991. This sets out the definitions for types of consent and ages for various consent for those under 18. The group leader will need to ensure that there is consent from the parents for each young person under 16 for each trip or activity, other than some Category 1 excursions.

If young people are over 16 the young person can give consent themselves. It is good practice, where the young person is living at home, to inform the parents of the activity but the young person, where they have sufficient understanding, is legally able to give their own consent. Schools should always ask for consent directly from the parents for pupils in all years, unless the young person is no longer living at home.

For regular Category 1 events, such as sports fixtures or club attendance, consent can be given for all the dates and venues involved in that one year or term via a single letter and consent form. Parents must be informed of any changes if they occur, which could be through an additional letter home, the school or club websites or notice boards.

Schools maintain a secure data base, through the 'click and go' IT system, containing the pupils contacts details and medical information. It is acceptable for schools to send parents a combined letter containing details of day excursions or extra curricular activities and a reduced consent form as they already hold much of the relevant information. For residential excursion and overseas excursions the complete form must be used. The group leader **MUST** have prior access to same relevant information with them that would have been provided on the full consent form and this must be available to them at all times. It is essential that parent still sign the consent letter, which must contain the following responses:

- That the emergency contact details held by the school are up to date.
- That the medical records held by the school are up to date.
- That's their child has not been in contact with infectious diseases in the last 21 days.
- That the parent agrees to the declaration, given on the standard consent form, which includes consent for their child to take part in the excursion and all activities involved.
- Agreement for medical professionals to undertake emergency procedures.
- An acknowledgment of the insurance cover and information sharing requirements.
- For agreement of responsibility for behaviour.

If a parent or an appropriately aged young person does not give consent, the pupil or young person must not go on the excursion and the Head of Establishment should ensure that the learning outcomes are achieved by other means, wherever possible.

It is vital that relevant medical information is shared with staff involved in the trip as required and this will include any of the instructors of the activities or those providing catering.

The educational procedure 6/01 **Data Protection** contains advice and consent forms for the use of images of young people in educational establishments.

- **Data Protection:**

All consent forms, groups lists and personnel information, whether stored on paper or electronically, must be safeguarded appropriately during the excursion and on return destroyed or stored as set out in the EDC **Data Protection Policy, Records Management Policy and Information Classification and Protection Policy**. In educational establishments this is covered in the educational procedure 6/01 **Data Protection**.

Original records must be retained for the period set out in the establishments **Retention Schedule**. Additional copies of personal information must be destroyed once the excursion has finished; for example additional consent forms.

- **Mobile Phones:**

The educational service has provided guidance for establishments regarding the use and access to mobile phones and similar devices. The Group leader should inform parents of the establishments own policy on the use and accessibility of phones on excursions.

Leaders should be aware that mobile phones can be used to spread misinformation about incidents that occur on an excursion. See Section 4.9 **Emergency and Contingency Plans**.

### **4.3 PREPARING YOUNG PEOPLE**

- **General Principles:**

Group members who are involved in the appropriate planning and organisation of their excursion can be better prepared to deal with any hazards or challenges that they may face. This involvement will vary depending upon the young people's development but the Head of Establishment and Group Leader must ensure that every effort has been made to ensure that the activity is suitable for the young people involved.

Whilst participants should be actively encouraged to engage with the activities available, they should not be coerced into a situation they are not happy with.

The young people need to be given sufficient information to allow them to understand the aims of the excursion, the expectations upon them and any significant hazards. This is particularly important if they are giving consent as participants themselves. This should be done in a sensitive manner as not to remove any enthusiasm for the trip or cause undue concern.

If they are not able to fully understand these issues for themselves, then the parents and staff involved should be in agreement that the activities are suitable and that sufficient support and controls are in place for the young person.

Young people should be aware, within the context of the excursion and their ability, of the following:

- The aims and objective of the activity or excursion.
- The behavioural expectations upon them and what sanctions they could expect, such as being sent home early.
- What is the appropriate personal and social conduct?
- What items they may need to bring or what not to bring.
- Any different cultural customs and relevant laws in the country being visited.
- Why certain safety precautions are in place and to be aware of any significant dangers that they should avoid.
- Who are the leaders involved and who is responsible for them at all times, particularly if moving venues and between activities.

- What to do if separated from the group or approached by someone from outside the group.
- Emergency plans.
- **Emergency or Help cards:**  
For some excursion, in particular overseas trips, it can be appropriate to give each member a small 'help card' providing basic contact details such as, the Group Leader's work mobile, hotel details and, if abroad, some basic phrases.
- **Preparing Young People for Remote Supervision:**  
These are times on an excursion where the young people are not under the direct control of a leader and have the freedom to operate independently. The level of remote supervision should be decided upon after risk assessment of the groups' age, development, the environment they are in or activity they are taking part in. For example they may be given freedom to explore a theme park in small groups only checking into the leaders every few hours.

The Group Leader must take care to ensure that the young people themselves fully understand the limits of the freedom they are being given and be aware of the significant hazards they may encounter. They must know how to contact staff and what to do if lost or separated.

On Duke of Edinburgh and similar adventurous expeditions this process should take place over several training periods. This training structure should be recorded and the steps taken by all participants' record to ensure that no team member misses out on training. The amount of training given should be proportional to the risks associated with the environment or group abilities.

See also section 4.1 **Supervision.**

#### **4.4 RESIDENTIAL ACCOMMODATION**

- **General Principles:**  
The Group Leader should ensure that the venue is suitable for the planned activities and the groups' needs. Risk Assessments are available for many of the outdoor centres used by groups and can be helpful to inform a leader's planning. For other venues leaders should examine the Generic Residential Risk Assessment. Whilst Generic Assessments are available from the ESO, the Head of Establishment must ensure that any specific issues relating to their own group are assessed - e.g. the accommodation requirements of pupils with additional support needs.

Young people's behaviour is particularly important on residential visits and Group Leaders should consider using codes of conduct and provide suitable information to parents. This should include planning for the early return home of young people due to personal or behavioural issues.

When looking at booking any accommodation the Group Leader should aim to ensure that the venue provides the following:

- The group members have adjoining rooms, with the Group Leader's quarters in the close proximity of the participants.
- There must be separate male and female sleeping and bathroom facilities for participants and adults.
- The immediate accommodation area should be exclusively for the group's use.

- Ensure there is appropriate heating and ventilation.
  - Ensure that the whole group is aware of the lay-out of the accommodation, its fire precautions and emergency exits.
  - If locks are fitted on the group members' rooms appropriate emergency access should be available to the leaders at all times.
  - There should be adequate drying facilities.
  - There should be adequate space for storing clothes, luggage, equipment etc and for the suitable safe keeping of valuables or medicines.
  - There should be adequate lighting and electrical fitting should be safe.
  - There should be planned provision for participants with additional support needs and those who fall sick.
  - Balconies, if accessible, should be stable and have suitable barriers.
  - Windows must, whilst allowing ventilation, be secure from unauthorised access and have limited openings to prevent accidental falls.
  - The fire alarm must be audible, and where appropriate visual, throughout the accommodation.
  - After arrival at any accommodation a fire drill is carried out as soon as possible.
  - There should be suitable recreational accommodation or facilities for the group.
  - There should be an appropriate number of supervisors on standby duty during the night.
- **Manned Establishments - Hotels, Hostels, Outdoor Centres:**  
Many facilities offer excellent accommodation for groups and have been specially built for the needs of young people. This is usually the case in outdoor or field study centres. When using hotels it is harder to find suitable facilities and issues of exclusive group use and controlled access can be harder to achieve.

The Group Leader should additionally ensure that;

- The manager of the accommodation has been asked for clarification regarding their staff, including temporary workers, in relation to their vetting for working with young people.
  - Security arrangements – where the reception is not staffed 24 hours a day, security arrangements should be in force to stop unauthorised visitors.
  - In-house catering is at a suitable standard and that the venue can cater for the medical, cultural or religious needs of the group.
  - When sharing accommodation with other groups, young people should have very clear boundaries and expectations, with careful consideration given to other guests.
- **Unmanned Facilities - Hostels, Bothies or Mountain Huts and Camping:**  
The use of unmanned bothies, huts or camping can create a real sense of independence and provide an opportunity to spend extended time in the outdoors. Whilst some of the desirable requirements of accommodation provided by, a purpose built outdoor centre for example, will not be easily achievable in these types of accommodation, with careful planning, groups are able to stay successfully at these venues.

It is vital that both participants and parents understand the different level of residual risk between, for example, a self contained outdoor centre and wild camping but that they also appreciate the great experience of 'living outdoors'.

The main principles that must be achieved, regardless of venue, are suitable, separate sleeping and washing facilities, safe cooking and hygiene, suitable emergency exits and plans and security arrangements.

When leaving unmanned facilities Group Leaders must take particular care that venue is left in a clean, safe and secure condition for the next users. Any damage or significant faults must be reported to those responsible for the site at the earliest opportunity.

Some venues will ultimately not be suitable for group use and it is advisable to contact the ESO to get advice on particular venues when planning an excursion. See section 8 for contact details of the Duke of Edinburgh Award scheme and the British Mountaineering Council who have guidance on wild camping.

Leaders and group members must also be aware of their responsibilities under the Scottish Outdoor Access Code. See Section 6.2. **Outdoor Access**

The Group Leader must follow the procedure manual 4/01 '**Outdoor Learning & Adventurous Activities ~ A Code of Practice**' for standards of leadership when trekking and camping.

- **Facilities Abroad:**

Whilst Group Leaders should aim to fulfil all the same requirements for UK accommodation, leaders and parents should be aware that there can be significant differences in building standards overseas.

Group Leaders should only plan to use facilities that have been audited by a reputable tour company or that have been suitably risk assessed by the Group Leader on previous visits. Where this is not possible then very good research must be done before hand and advice taken from the ESO.

Check the Generic Risk Assessments for overseas trips and accommodation. The following are some examples of points to consider:

- It is not always a requirement to have automatic fire systems in many European countries.
- Are emergency exit signs understandable by the young people?
- The tap water may not be drinkable.
- Hostel staff would not have been subject to UK type vetting.
- Access to alcohol.

#### **4.5 FIRST AID AND MEDICAL REQUIREMENTS**

- **General Principles:**

The level of first aid provision should be based upon an assessment of the hazards and risks relating to each individual trip. This will take account of the location, type of activity, age and medical needs of the group. Generally, the longer it takes to get to professional medical assistance, the higher the level of first aid skill that will be required in the leadership team.

It is sensible to obtain professional medical advice if an incident occurs, particularly if there is any doubt over the severity of an injury. A first aider is only in place to provide immediate emergency care until professional medical care can be sought. Parents should be informed of all incidents at the earliest reasonable opportunity. It is important to maintain this communication with parents and the base contact to keep them informed of developments; it is better to have too much contact than too little.

See section 4.9 **Emergency and Contingency plans** for guidance on the use of accident report forms.

- **Requirements on Excursions or Activities:**

On all trips there must, as a minimum, be an adult appointed to be in charge of First Aid and any medical requirements. There should also be access to a suitable First Aid Kit (as per HSE requirements). It is advisable to have details of the nearest medical facilities.

For more remote venues, trips abroad, residential excursions or adventurous activities there must be at least one member of the leadership team, which may include instructors or ancillary adults, who holds a current emergency first aid certificate that is relevant to the environment.

For adventurous activities the instructor must hold a current first aid certificate as required for the NGB award.

For trips that include treks at altitude or in jungle environments the leader or instructor must have additional and relevant first aid training.

- **Medical Conditions and the Administration of Medicines:**

The Group Leader must ensure, at the initial planning stage that the activity, transport and venues are suitable for the staff and young persons who may wish to be involved, taking account of any known medical conditions. For some activities it may be necessary to obtain professional medical advice such as confirmation from the individual's doctor that they are fit to take part. Leaders should check if the insurance company being used requires notice of pre existing conditions before the excursion take place.

Individual participants and their parents should be given the opportunity to talk through any concerns that they may have about the trip or activity and to examine any additional medical support that may be needed.

The appropriate procedure should be followed with regard to the administration of medicines or drugs. A member of the leadership team must be able to manage the needs of the group and training may be required. See the Educational Manual 9/06 **Managing the Healthcare Needs of Pupils: The Administration of Medicines in Schools**.

If the group's needs are not covered through establishment staffing then other suitable support must be in place. This may be through a school nurse, external support staff or the parent.

It is vital that medication is readily available at all times on the trip. It is rarely sufficient to have only verbal assurances from the young people that medication has been packed and it is often best for the leaders to see it for themselves. Spares and prescription details should be taken if possible, and consideration must be given to the safe keeping of medicines.

The Group Leaders should understand each participant's medical needs and a summary of the needs within the group, any emergency action plans and parents contact details should be shared with the leadership team or provider as necessary.

#### **4.6 PROTECTION OF CHILDREN**

- **General Principles:**

Group Leaders should be aware of the Department's Child Protection Policy and of the potential risks to children on the excursions they are leading. All staff involved should be familiar of the need to protect children and to understand the signs of a child that is at risk or has been harmed and to know how to respond appropriately.

Leaders should plan to minimise situations where children are at risk. The leadership team must have control in place to protect young people from, inappropriate contact with adults, other children and young people, inappropriate contact between peers and other situations of abuse or bullying.

For the safety of leaders and young people, all adult supervisors should ensure that they are not alone with a young person whenever possible.

It is also good practice that, clear and open discussions are had with both parents and the young people about the expectations of behaviour, safety rules and contact arrangements, before any trip takes place. These discussions should address, where appropriate, issues such as alcohol, smoking, drugs, sexual relations and the expected sanctions if inappropriate behaviour arises.

- **Vetting of Adults:**

All adult Group Leaders, supervisors or volunteers who work in 'child care' positions or who have unsupervised and regular contact with children must be vetted as per the EDC Child Protection procedures. There are some circumstances where a Head of Establishment may judge the limited level of contact means that a Disclosure check is not necessary. For example, a parent helper on a day excursion in which they are not in sole supervision of children.

The head of establishment should examine the educational procedures **3/36 Promoting Good Practice in Child Protection: The appointment of adults to Voluntary 'childcare' positions within services managed by East Dunbartonshire** for further guidance in this respect.

Care must be taken when planning the supervision of sporting, swimming or similar activities, on residential trips, when giving medical care or support. In these circumstances all adults involved would be expected to have an Enhanced Disclosure.

- **Use of Images:**

Before images (photographs or video) are taken, for internal establishment use, of young people under 12, permission should be sought from the parents. Young people over 12 are able to give consent themselves for internal establishment use. Permission must always be sought for the use of images by external bodies and press use.

The Educational Procedure 6/01 **Data Protection** contains details with regard to this and has consent forms relating to the use of images.

- **Identification:**

On certain trips it can be useful and appropriate to have pupils wear school uniforms or coloured caps as helpful forms of identification of the group members when in busy settings. Whilst this can assist with 'head counts' for example, care should be taken that the level of personnel identification, such as names, is appropriate to the context of the activity and environment.

- **Visits Abroad:**

Heads of Establishment and Group Leaders should be aware of the different laws and regulations that relate to young people when travelling abroad. UK style vetting is not common abroad and Group Leaders should pay additional care, in terms of supervision, when working with adults who have not been vetted.

A good source of additional information for trips to Europe is the publication - 'The Protection of Young People in the Context of International Visits'.

See Section 8 **Further Reading** for details.

#### 4.7 **INSURANCE**

- **General Principles:**

Approved educational excursions or extra curricular activities, run by the Community Services Department or Connect Services, are provided with cover through our EDC Travel Insurance policy. It is important that leaders and parents are aware of the level of cover provided or any exclusions & conditions, which includes certain activities, environments and travelling against medical advice. The Educational Procedure Manual 7/03 **Insurance for Pupils, Teachers & Other Adults taking part in Educational Excursions & Other Activities** provides details of the current Council insurance scheme available for educational establishments.

Excluded activities include caving, multi pitch rock climbing or mountaineering, off shore sailing, racing of any kind other than on foot, certain high level ropes courses. All skiing, the use of lifts or snowboarding must be under the direct supervision of a qualified instructor, unless the participants are on a nursery slopes with the instructors consent.

All activities must be delivered by appropriately qualified leaders and be part of an appropriate risk assessment and management system.

The insurers & the head of education must be informed immediately, or as soon as reasonably possible, of any emergency that may potentially give rise to a claim

All monetary losses must be reported to the local police within 24hrs and all loss or damage to baggage reported to the carrier, tour operator or hotel within 24hrs, in order to make a claim on return from the excursion.

Some external providers offer their own insurance for the expedition or tour and it will be up to the Group Leader, in consultation with the head of establishment and parents, whether to take this optional policy instead of the EDC standard policy. Whilst groups or individuals may wish to take additional cover for certain valuable items or specific activities, it is not possible to claim twice for the same item or incident on alternative policies. Ensure that the insurance offered covers all elements of the excursion, including complete cancellations, transport delays, changes in itinerary.

- **Pre Existing Medical Conditions:**

Participants with pre existing medical conditions, illness or who have been in recent contact with an infectious disease should carefully check the details in the insurance policy they are taking.

It is a requirement of the EDC policy's that participants do not travel against the advice of a qualified medical practitioner (QMP). The insurance company or EDC do not require to view any correspondence from the QMP or participant preceding the trip. Any discussion regarding medical conditions and fitness to travel will only need to be between the participants and their QMP. In the event of a claim, the participant's medical practitioner would be contacted by the insurers to confirm, in writing, that they were satisfied that the individual concerned was fit to travel and take part in the activities undertaken.



The QMP providing advice must not be the insured person, their partner or a member of their immediate family.

Further advice can be sought from the Educational Support Officer or the Council's Corporate Insurance section (0141 578 8000).

#### **4.8 FINANCE**

- **Open and Auditable:**

The Head of Establishment should ensure that all financial dealings follow the relevant sections of the current **EDC Financial Regulations** policy. In Educational establishments this guidance is contained within the procedure 7/02 **Financial Regulations**.

- **Support for Young People:**

For school pupils who are eligible for free school meals the education service will provide a subsidy to schools to support the pupils' attendance on a residential visit to an Outdoor Centre.

The subsidy will be available, once per year, to eligible pupils who attend an Outdoor Centre in any of the following years:

P6 & P7 - maximum of 1 visit per pupil per year

S1 & S2 - maximum of 1 visit per pupil per year

The subsidy available is currently £140 per eligible pupil. Cost above this will need to be met by the parents, Parent Council or the establishment.

For further information contact Education Finance Officer. (0141 578 8719)

- **Added Costs Relating to Young People with Additional Support Needs:**

Establishments must calculate, as early as possible, any additional costs such as extra staffing or adapted transport that will be incurred on the excursions. All the expenses required to run the excursion should be calculated before parents are informed of the costs for their child to participate on the excursion.

Within education, schools would be expected to budget for costs that relate to extra curricular activities. For costs relating to curricular activities schools can approach either the Inclusion Officer or Head of Service for additional support who will consider requests on a case by case basis.

- **Medical and Visa Costs for Overseas Trips:**

Establishments should calculate any charges that leaders or young people, will incur if vaccinations, anti malarial drugs or visas are required. Costs should be met by the establishment, participants or added to the overall charge for the excursion.

- **Bonded Travel:**

All tour operators and travel organisers who offer educational tours or packages must be 'Bonded' operators who have a current licence with one of the appropriate bodies. Bonding bodies carry out checks on the operators and travel organisers they license, have a code of conduct and require a financial guarantee called a 'bond' to be lodged with them. This ensures that if the operator goes out of business you can claim a refund on your trip or claim for new travel costs.

If a tour operator organises air travel on your behalf they must hold an ATOL Bonding licence.

If you book your own accommodation, transport or air travel, these separate elements of the trip will not be Bonded. The EDC excursion insurance provides cover for travel delays but not insolvency.

Bonding Bodies include:

- Association of British Travel Agents (ABTA) - provides Bonding for package tours.
  - Association of Independent Tour Operators (AITO) - provides Bonding for package tours,
  - Air Travel Organisers Licence (ATOL) - provides Bonding for air travel.
  - The Passenger Shipping Association (PSA) - provides Bonding for packages involving cruises or ferries.
  - Some smaller travel firms (less than 500 flight bookings per year) use a 3<sup>rd</sup> party organisation to provide them with Small Business ATOL Bond (Mini ATOL).
- **Contingency Funds:**  
The Head of Establishment should ensure that the Group Leader has the capability to access suitable and sufficient funds to deal with any contingency plans. This may include having to provide, at short notice, overnight accommodation, additional travel costs or meals.

#### **4.9 EMERGENCY AND CONTINGENCY PLANS**

- **General Principles:**  
Good planning is the best protection against accidents occurring. Despite this things can go wrong and it is necessary to have realistic plans in place to deal with these events, which can range from a minor inconvenience to a major accident. Remember that 'an accident is an unplanned or unforeseen event in a series of planned events'

The Council has procedures in place to deal with major incidents and press officers who will deal with the media.

Effective communication by the Group Leader with the leadership team and establishment is vital, even if an incident does not appear serious, as it removes the opportunity for incorrect information to develop. This is particularly important if group members have access to mobile phones and Group Leaders should report to their establishment the facts of any incident if there is a risk that pupils have been touch with home or friends to report on what may have happened.

- **Contingency plans:**  
Group leader must have plans in place to deal with events such as travel delays, poor weather or staff illness. The detail and level of contingency plans should be assessed through the excursion risk assessment. Additional staffing or resources should be available to ensure that measures are in place to deal with any significant problems.

Some examples of foreseeable events:

- Your planned transport breaks down - how will the group get back? Will there be any parents waiting at the school gates who will need to be informed of the delay? Will there still be staff at the establishment who can assist with the group on arrival?
- If on the day of a hill walk the weather turns bad - is there a different more suitable route that could be used? If the activity was to be cancelled will it be possible to take the group straight home or will an alternative activity be needed to fill the day?

- A young person arrives on an activity without a prescribed medication such as an inhaler or loses it on the day - is there a spare available or can a replacement be obtained locally?
- The Group Leader pulls out at the last minute due to an injury, who will take over the trip and are they competent to do so?

It is possible to have plans in place for all of the above incidents that would reduce the difficulties on the day and prevent a minor incident developing into a major one.

It is important to remember that several major accidents have taken place when there was an unwillingness to change an activity, despite environmental conditions on the day, due to the pressure of 'expectation' created about an activity and having no other options or a plan B.

- **Emergency Procedures:**

On location the Group Leader will normally take charge and they should carry a mobile phone which is suitable for the country of use. They will liaise with the Base Contact and the activity provider or tour operator if one is being used.

All leaders have a responsibility to act as any reasonably prudent parent would and they should not hesitate to act in an emergency or life-saving situation.

If an accident occurs there are four main priorities:

1. Assess the situation.
2. Safeguard the uninjured members of the party.
3. Attend to the casualty.
4. Inform the medical services and others who need to know about the accident.

- **Base Contact:**

Whenever a group is out on an excursion or activity there must be a suitable EDC staff member, who is not on the excursion and contactable at all times, to assist those on the excursion in an emergency or incident.

This Base Contact must have ready access to details of the excursion, including staff & group member details, relevant medical details and an itinerary.

The Base Contact will need to obtain the relevant information regarding the incident from the Group Leader and will need to liaise with the appropriate EDC management, parents and other EDC staff or emergency agencies who may need to be involved.

They will need to have an understanding of the excursion, relevant Council procedures, how to implement them and how to contact any relevant EDC senior management, usually their Head of establishment or Head of Service.

For trips that take place out of regular schools hours or during holidays, the Group Leader should be provided with additional back up emergency numbers in case the initial person cannot be contacted, for whatever reason.

- **Council Procedures:**

Each department or Directorate is responsible for having plans in place for dealing with major incidents. Each school will have also their own emergency plan.

If a serious incident occurs the Group Leader must always contact their Head of Establishment who will, if necessary instigate their Departmental or school emergency

plan. This contact can either be done directly by the Group Leader or through the Base Contact.

See the EDC **Policy and Procedures for Managing Critical incidents and Trauma** for more guidance.

- **Accident Reporting:**

Establishments must always complete an EDC accident report form after all accidents. Even if the venue or provider completes a form for themselves the Group Leader should complete an EDC PER 1 form and pass it on to their head of establishment.

See the current EDC procedure **Accident & Incident Reporting**.

- **Media Contact:**

The Group Leader, group member or base contact should not speak to the media but direct their enquires to the Council Press Officer. This can be done through their Head of Establishment or Head of Service.

- **After a Serious Incident:**

Careful consideration should be given to the effects of a serious incident upon those directly involved and others in the establishment. In some situations, professional help should be sought and a Head of Establishment should liaise with their Head of Service to access such assistance.

After any incident it would be appropriate to conduct a review of the incident and any lessons learned should be incorporated in the relevant procedure manuals, risk assessments and emergency plans. This review may involve key stakeholders and the Council's Health and Safety Officer.

See the EDC **Policy and Procedures for Managing Critical incidents and Trauma** for more guidance.

#### **4.10 CHECKLIST OF ARRANGEMENTS & PLANNING**

The appendixes contain two examples of checklists that aim to assist the Group Leader and Head of Establishment ensure that excursions have been provided with.

- Clear educational outcomes and benefits for those taking part.
- Sufficient health, safety and welfare provision for both the young people and staff.
- Effective planning, leadership and support.

## **PART 5 - TRANSPORT AND TRAVEL**

### **5.1 GENERAL PRINCIPLES**

Heads of Establishments and Group Leaders should be aware that transport is statistically the most hazardous part of any excursion. When planning transport they must be confident that all reasonable control measures are in place to minimise any risks. There are various Regulations and Acts that cover transport and these can initially seem daunting.

Some examples of consideration are:

- Supervision whilst on the transport and areas connected with it.
- Contingency plans for delays or missed connections and the ability to finance any changes.
- Will the driver need to be Disclosure checked?
- **Responsibility for Transport:**  
The establishment should make it clear to the parents' who is responsible for any travel arrangements. See Section 4.2 **Communicating with Parents**. For example, is it up to the parents to independently organise the travel and arrival of their child from the school to an after school sports club, with no action taken if they do not arrive or is the school providing transport and a register of attendee's.

Heads of establishments should be aware of the necessity to pre plan any route taken during an excursion, in consultation with the transport operator, to avoid any potential hazards. E.g. low bridges, particularly where double decked vehicles are in use.

The establishment is only responsible for the travel or transport that it organises and the level of supervision will depend upon the age of the young people and venue being used.

Educational establishments should consider the guidance in the procedure manual 3/28 **Offers to Provide or Arrange Transport to Sports Centres, Swimming Pools etc** in relation to charging.

### **5.2 MOTOR VEHICLES**

Under the 1998 Road Traffic Act, drivers need to ensure that vehicles or trailers are suitable and that the manner in which they are used is not going to cause injury or harm to the users or other road users. Further advice can be obtained from the EDC Fleet section, based at the Hilton depot or through the Department for Transport.

Section 26 of the current EDC **Financial Regulations** contains procedures relating to the hiring, ownership and renting of vehicles.

- **Seatbelts & Additional Restraints:**  
Legislation in September 2006 brought in additional requirements for wearing seatbelts and the use of restraint (Seatbelts, Booster or Child seats) in cars, vans and other vehicles in the UK.

In EDC any vehicles used to transport young people on an activity or excursion must be fitted with seat belts and the appropriate child seat or booster.

East Dunbartonshire has produced a booklet, 'Safe School Travel', aimed at young people, which sets out the responsibilities of passengers.

Under UK law it is the driver's responsibility to ensure seat belts are worn for passengers under 14 and once they are over 14yrs, it is the passengers' own responsibility to wear available seat belts.

All mini buses, private cars or taxis used during an excursion or visit must have 3 point seatbelts fitted to every seat.

All coaches, single decked vehicles or doubled decked vehicles used during an excursion or visit, in the UK or abroad, must at a minimum have lap belts fitted to every seat.

There are situations where it is not possible to obtain vehicles matching these requirements for seatbelts, as in some developing countries. In these environments the head of establishment must be satisfied that, through risk assessment, the vehicles are appropriate to use and the Head of Education must be informed.

Groups using tour operators to arrange transport should be satisfied that the agent has audited and risk assessed the use of any vehicles and that the vehicles match the above requirements for seatbelts

- **Loading and Unloading:**

Take care when loading transport to lift and pack luggage in a manner that does not block any emergency exits, cause bags to fall upon passengers or injure those lifting heavy items.

Ensure that all emergency exits are unlocked when travelling.

Take care when accessing, exiting or loading vehicles. Be aware of using appropriate parking areas, other road users in the area and always exit towards a pavement where possible.

- **Long Journeys:**

Plan journeys to allow for both drivers and passengers to have sufficient rest and comfort breaks.

All PCV drivers must comply with the hours set by their Passenger Carrying Vehicles Licence.

- **Mini Buses:**

For leaders to be able to drive any mini bus they must have been tested and approved through the EDC Fleet section based at the Hilton depot.

- Drivers who obtained a full car licence before 1 January 1997 may drive a mini bus if they have on their current licence the **D1** entitlement. Having the code **D1 (101)** removes the right to drive for the purpose of '**hire and reward**' but the holder can drive as a volunteer.

- Drivers who obtained their full car licence after 1 January 1997 can drive only a mini bus as a volunteer, for a non commercial body, on the conditions that the vehicle is under a gross weight of 3500kg and that they have held their licence for more than 2 years. They must receive no payment or consideration other than out of pocket expenses and cannot tow a trailer. To drive in a hire & reward setting they must obtain a full **PCV** (Passenger Carrying Vehicle) category **D1**.

- Drivers who hold the **D1** entitlement may pull a trailer up to 750kg and those with a **D1 E** may tow a trailer over 750kg but under other overall weight limits.

- All mini bus drivers driving outside the UK need to hold the full **D1** entitlement and comply with strict standards with regard to driver's hours.

Mini buses are covered by regulations relating to their use for **'hire and reward'**. This includes the direct payment by passengers to use the transport, payments to drivers or contractual obligations by staff to drive and indirect charges that allow the participants use of the vehicle. Commercial bodies using vehicles for 'hire and reward' must hold a Public Service Vehicle (PSV) operators licence.

Non commercial bodies using vehicles for 'hire and reward' in community or educational settings can be exempted from PSV registration through the use of a Section 19 Permit. Section 19 permits cannot be used outside the UK. School staff and voluntary unpaid drivers are not normally driving in a 'hire & reward' situation. If there is any uncertainty, advice should be sought from EDC Fleet as to the legal situation surrounding 'hire & reward'. EDC Fleet can be contacted at the Hilton Depot on 0141 574 5782.

All mini buses must be hired through the EDC Fleet section to ensure that they meet the safety standards set by the Council and comply with 'hire & reward' regulations.

The EDC **Financial Regulations - Section 26** has details of council procedure for Heads of Establishments with regard to vehicles, whether owned or hired. In educational establishment this policy is titled Educational Procedure Manual 7/02 **Financial Regulations**.

- **Coaches:**

The education service holds a comprehensive list of coach and taxi firms that are approved by Strathclyde Partnership for Transport (SPT) for use on school trips.

All educational establishments must only hire from the operators on this list unless prior permission has been obtained from the Director of Community Services or Head of Service. If the excursion is taking place in an area outside the scope of these firms then the Head of Establishment will need to use a local reputable firm as necessary, after prior consultation with the Head of Service.

If a tour operator is responsible for providing transport then the Head of Establishment must be satisfied that the tour company has sufficient checks in place with regard to the vehicle companies they use. Advice can be taken from the ESO with regard to this issue.

Coaches must be fitted with seatbelts in the UK. All drivers must hold a full PCV certificate. They are bound by additional requirements for driver's hours and on extended journeys there may need to be an additional driver.

- **Taxis:**

As above, always use a reputable, licensed firm when hiring taxis to ensure that quality and safety standards are maintained. Licensed taxis are currently exempt from using booster seat.

Educational establishments must only book firms on the approved SPT transport list, as with coaches, unless the excursion is taking place in an area outside the scope of these firms. In these situations the Group Leader will, in consultation with the Head of Establishment, need to use a local reputable firm.

- **Private Vehicles:**

If the establishment is using private vehicles as part of the provided transport during their work, to carry colleagues or young people, the Head of Establishment should be satisfied the vehicles & the driver comply with legal requirements. This should include insurance cover suitable for business use, including carrying young people or colleagues.

The Head of Establishment should also consider the suitability of the volunteers to transport young people and it may be necessary to consider vetting procedures.

### 5.3 **PUBLIC TRANSPORT**

#### **General Principles:**

When using public transport the main causes of problems can be the busy and often confusing transfer areas and group member behaviour; highlighting the need for adequate supervision and good discipline.

- Clarify the amount of freedom that the group members have to 'roam' around whilst travelling.
- Watch for group members becoming separated and use head counts at regular intervals.
- Store luggage carefully, ideally keeping it within sight.
- Ensure that the group are aware of muster points, emergency exits and procedures.
- Plan to buy tickets prior to arrival as a block booking.
- Be particularly aware of other users in respect of image presented by the group and annoyance factor that can be caused by poor behaviour or weak group control.
- Examine and implement the relevant travel Risk Assessment.

- **Trains and the Underground:**

When using trains arrive with plenty of time to gather the group safely on the platforms. Be particularly wary of platform edges and embarking. Have clear plans for staff and appoint one staff member to lead onto and off the train and one as the last person on and off.

Whilst similar to mainline trains, the underground can be more confusing to negotiate and exceedingly busy. The use of underground trains is only really practical with small groups and as it is easier to become detached as a group. For example, if individuals are separated on a regular train journey a mobile phone can be used to make contact. This is obviously not possible until reaching the station exit when using the underground.

Maps of unfamiliar railway systems can be very helpful for all members and as part of the contingency planning, agree on a location to return to if group members become separated.

- **Buses and Trams:**

Use of public buses and trams is only really practical with small groups. There can be difficulties in buying tickets, sufficient seating and supervision etc. Be aware of group members sitting in widely distributed seats and ensure all group members get on and off safely.



#### **5.4 TRAVEL BY AIR & BOAT**

- **Air Travel:**

When possible, book with companies who are licensed by the Civil Aviation Authority (CAA), or similar well established authorities. Follow the same guidance as for public transport, where appropriate. Allow sufficient time for any transfers or connections to other transport. Remind group members of the need for personal vigilance with belongings to avoid loss and tampering and ensure that they do not carry any banned objects.

Be aware that budget airlines often charge full ticket prices for missed flights or connections and provide only limited support if flights are delayed or cancelled. Ideally book flights through a bonded company ~ see Bonded travel in section 4.8 Finance.

- **Ferries:**

Follow the same guidance as for public transport, where appropriate. Be particularly aware of young people whereabouts and knowledge of emergency plans. Risks include persons overboard and injury in the vehicle deck areas.

If any group member is suspected as missing the Master of the Ship must be informed immediately.

#### **5.5 WALKING**

Appropriate supervision for the group and good discipline are essential for walking groups along paths or roads. Where possible, always use routes with good pavements and place leaders at the front and back of the group. Consider high visibility clothing or flashes if in poorly lit areas, cross at sensible locations using traffic lights, or pedestrian crossings and footbridges where possible; following good practice such as the 'Green Cross Code' when doing so.

#### **5.6 TRAVEL ABROAD**

Transport standards whilst travelling abroad can vary greatly. Any company providing expeditions or educational tours should have assessed the risks for the particular country and have policies and Risk Assessments available for inspection.

Be vigilant when hiring vehicles abroad, particularly in developing countries and, unless absolutely necessary, do not travel on roads or rail at night in these higher risk countries. Seek further advice from the Educational Visits Officer. (ESO)

## **PART 6 - STANDARDS FOR ADVENTURE AND SPECIFIC EXCURSIONS**

### **6.1 ENVIRONMENTAL HAZARDS**

- **Weather:**

Group Leaders need to have plans in place to take account of the variable weather that can affect excursions or activities, particularly when supervising young children. This will involve obtaining reliable forecasts and having alternative plans in place for poor weather conditions. Leaders will sometimes need to have spare clothing or access to shelter to cope with the elements. Group members will need to have appropriate clothing and equipment lists and information given to parents to should highlight any special requirements.

See the procedure manual 4/01 '**Outdoor Learning & Adventurous Activities - A Code of Practice**' for more detailed advice for those working in outdoor environments.

- **Exposure to Strong Sun and Heat Conditions:**

The Group Leader needs to ensure that suitable precautions have been put in place to deal with the effects of the sun and heat. This will include ensuring group members have sun cream, clothing, hats and leaders may need to adjust the programme to alleviate over exposure. The leadership team should be aware of the symptoms of heat and sunstroke and monitor group members with regard to their fluid intake, as necessary. Leaders running trips aboard or engaging in outdoor activities such as skiing or water sports will need to be extra vigilant in this respect.

- **Hypothermia:**

For many everyday excursions the risk of hypothermia is very low but Group Leaders should be aware of its signs and how quickly cold, wet children can begin to be at risk.

It is a much more significant risk for those groups involved in adventurous activities or field studies but Group Leaders should always ensure that group members and the leadership team have clothing to protect them from the elements.

- **E. Coli 0157:**

E. Coli 0157 is strain of the Escherichia Coli bacteria that is a normal inhabitant of the large intestine of mammals and birds. 0157 can cause illnesses ranging from mild diarrhoea through to very severe inflammation of the gut and this can occasionally cause complications such as kidney failure and anaemia. It is most commonly spread to humans via direct or indirect contact with droppings or manure spread on the land and it can survive in the soil or faeces for weeks. It can also be transferred through contaminated water or food. The highest risk is to the very young or older population.

Good hygiene control, hand washing and avoidance of certain pastures are among the necessary steps to take. There is more additional guidance regarding E Coli available from the Scottish Government and specific advice was issued to schools in May 2003.

- **Leptospirosis or Weil's disease:**  
Leptospirosis is transmitted to humans through contact with the urine of rats, cattle, foxes, rodents and other wild animals, usually by contact with contaminated soil or water. The bacteria, enters the body via cuts to the skin, the nose, mouth or other mucous membranes. In most cases, the infection causes a flu-like illness and severe headaches. The severe form of the disease (Weil's disease) causes jaundice and liver damage. Additional care should be taken on adventurous activities and on field trips. Contact the Educational Visits Officer for further advice.
- **Lyme Disease:**  
Lyme disease can be transmitted to people when a tick feeds on an infected animal, then goes on to bite a human. The infection is not transmitted directly from person-to-person, or from other animals. Woodland, heathland or occasionally parkland areas where deer or sheep live, are the most likely places to catch Lyme disease. The risks are higher if you are camping or involved in outdoor activities in these areas, with the highest risk during late spring, early summer or autumn. Most people with Lyme disease then develop a reddish skin rash. The rash spreads out from the site of a bite after 3 to 30 days. Other common symptoms include tiredness, headache, joint pains, and flu-like symptoms and a long course of antibiotics may be needed. Contact the Educational Visits Officer for further advice.
- **Toxicara:**  
Toxocariasis is an infection caused by worms commonly found in the intestines of dogs and cats. Humans become infected by accidentally ingesting worm eggs and by eating food that is contaminated with soil containing the eggs. It can lead to sickness, swelling of the body's organs or central nervous system and in extreme cases lead to reduced vision or blindness. The severity of a Toxocariasis infection depends on the number of worm eggs swallowed and the severity of the reaction to them. Children are most likely to develop Toxocariasis; especially those aged 2-7 years. This is because children are more likely to come into contact with soil or sand that contains puppy or cat faeces and are less likely to follow sensible hand-washing hygiene.

## 6.2 **OUTDOOR ACCESS RIGHTS AND RESPONSIBILITIES**

In Scotland, the Land Reform (Scotland) Act 2003 provides a statutory right of responsible access to most land & inland water in Scotland. The **Scottish Outdoor Access Code** details our rights and responsibilities. The code is based on three key principles:

- Respect the interests of other people
- Care for the environment
- Take responsibility for your own actions

Group Leaders should have an understanding of the main principles before they organise trips. Advice can be sought from the ESO and copies of the code and educational packs can be obtained from Scottish Natural Heritage (SNH). Contact details for SNH can be found in Section 8 **Further Reading**.

Access rights in England and Wales are different and are covered by the Countryside and Rights of Way Act 2000. ([www.defra.gov.uk](http://www.defra.gov.uk))

### **6.3 FARM VISITS & SIMILAR ATTRACTIONS**

When making visits to farms, and similar venues with animals, particular care should be taken with the selection of the venue and its suitability for the individual group members. There can be a range of significant hazards at working farms and these are highlighted on the relevant generic risk assessment. See the Environmental section for details of E.Coli, Lyme disease, Toxicara and Leptospirosis hazards.

The organisation The Royal Highland Education Trust (RHET) produces a booklet containing detailed advice and drawing on a range of sources; '**Guidelines for Farm Visits**'. RHET can also arrange visits to carefully selected farms within the local area which have been audited and prepared to make them suitable for school visits. Contact details for RHET can be found in Section 8 **Further Reading**.

A number of sources of additional guidance exist from the Health and Safety Executive, the NHS Scotland and the Scottish Government which are listed in the appendices.

Group Leaders should see the relevant generic Risk Assessment and complete it for their own trips.

### **6.4 POND DIPPING, CANALS AND ACTIVITIES NEAR WATER**

Group Leaders must ensure that activities in these settings are carefully supervised and formally planned. The group should have a clearly defined activity area and all leaders should understand their own responsibilities.

It is not normally necessary to have qualified lifeguards present if the group is not entering the water for swimming but the Group Leader should be satisfied that if someone fell in could they affect a safe rescue.

All sea or natural water swimming is covered in the procedure manual 4/01 '**Outdoor Learning & Adventurous Activities - A Code of Practice**'.

Points to plan for include:

- The weather.
- General surroundings - Accessibility and type of terrain.
- Tidal conditions - including sand bars and steeply shelving beaches.
- What to wear - clothing and footwear.
- A plan B - including agreed criteria for cancelling the activity.
- Group behaviour and level of supervision.
- Group Leaders should examine the relevant Generic Risk Assessment and complete it a specific one for their own trip.

### **6.5 SWIMMING POOLS & BATHING IN NATURAL WATERS**

When using swimming pools the Group Leader must be satisfied that the venue has appropriate life guarding facilities in place. Issues such as safe changing should also be considered.

The generic consent form specifically asks questions about swimming abilities and parents must always be aware that swimming may take place, even if it is a plan B option.

All sea or natural water swimming is covered in the procedure manual 4/01 '**Outdoor Learning & Adventurous Activities - A Code of Practice**'. Faculties abroad vary in standards and advice should be taken from the ESO.

## **6.6 ADVENTUROUS ACTIVITIES**

Adventurous activities are defined as activities that contain an obviously recognised element of challenge or risk that are integral to taking part in that activity. They have fantastic potential for engaging young people and for personal development, personal achievement and fun. They are also a great opportunity for misadventure, if not delivered correctly.

These activities must always be led and managed by competent staff. For specific staff qualifications and standards for adventurous activities refer to the EDC procedure manual 4/01 '**Outdoor Learning & Adventurous Activities - A Code of Practice**'.

The following adventurous activities are covered, in the UK, by the Adventure Activities Licensing Regulations (2004) - caving, canyoning or gorge walking, trekking by foot, horse riding or cycling, skiing in certain terrain or remote areas and certain water sports, including canoeing, rafting and sailing.

To provide these activities to young people under 18, the operator must hold a licence issued by the Adventurous Activities Licensing Authority (AALA). There are several exemptions to this requirement, catering for voluntary organisations, educational establishments delivering to their own pupils and when the parents accompany the young person. See sections 2.3 **External providers**.

## **6.7 FIELD TRIPS**

Field trips can range from straightforward walks to well known tourist venues such as Loch Lomond to environmental investigations in more remote setting, involving rivers and mountainous terrain. Staff leading these excursions must be competent to lead groups in the areas they visit and must follow the Procedure Manual 4/01 '**Outdoor Learning & Adventurous Activities - A Code of Practice**' where appropriate.

The Educational Procedure Manual 9/08 **Health & Safety in Science Education: A Code of Practice** covers lessons dealing with living organisms and has a section on field work.

Various organisations run field study centres and their suitability as venues can be assessed in the same way as outdoor centres with similar assessment criteria. They are often operationally similar to outdoor centres and some are licensed under the AALA scheme enabling them to offer adventurous activities. See sections 2.3 **External providers** & 6.6 **Adventurous Activities**.

## **6.8 DUKE OF EDINBURGH AWARD AND SIMILAR PROGRAMMES**

The Duke of Edinburgh Award and similar schemes, such as the John Muir Award or the ASDAN scheme, provide recognition of the achievement of the young people who have completed various themed elements, which can include personnel sporting skills, expeditions and community work.

The Duke of Edinburgh Award Officer in EDC works within the Youth Issues team and they can inform Group Leaders of how the scheme operates.

All expeditions must be approved, before they take place, by an appropriate technical adviser appointed by the Awards officer.

Leaders and supervisors of the expedition sections of these awards must refer to the procedure manual 4/01 '**Outdoor Learning & Adventurous Activities - A Code of Practice**', which contains a matrix of the appropriate qualifications for supervisors and standards for managing these sections of the award.

Remote supervision is an integral part of these expeditions and both participants and parents must fully appreciate the level of supervision and responsibility placed upon the young person whilst on the expeditions. The amount of supervision and training given should be proportional to the risks associated with the activity, environment or group abilities. See section 4.1.

The training plan and the steps taken by all participants' must be recorded to ensure that no team member misses out on training.

Group Leaders should inform their department HQ of the expeditions they are planning using the appropriate forms, as with any other residential trip.

## **6.9 OVERSEAS TRIPS**

- **General Principles:**

Overseas trips provide an opportunity for young people to experience a culture and environment often very different from their own, enabling a better understanding of cultural differences, the world and their own context within it. There is an increasing trend towards overseas trips as the Scottish Government sets out in the document 'An International Outlook ~ Educating Young Scots about the World' SEED 2001.

The Scottish Government endorses the guidance '**The Protection of Young People in the Context of International Visits**' 2002 and details in relation to this document can be found in the appendices. The EDC Educational Procedure 3/22 **Guidelines for the Management of Incidents of Drug Misuses** in Schools highlights the difference in laws aboard relating to drugs.

The principles in planning a trip abroad are largely the same as a UK residential trip and Group Leaders should use the Generic Overseas Risk Assessment as part of their planning.

- **Foreign Office Travel Advice and Embassies:**

The Group Leader should check with the Foreign and Commonwealth Office (FCO) with regard to any travel advice or warnings about the country they are travelling to or through. Up to date information and a range of useful leaflets are available at [www.fco.gov.uk/travel](http://www.fco.gov.uk/travel) or by calling 0845 850 2829.

The Group Leader must have the details for the British Embassy, High Commission or Consulate of the country that they are visiting.

- **Passports and Visas:**

The Group Leader should ensure all passports are valid for at least 6 months and that the full next of kin details are in all the passports. The Group Leader must leave photocopies of all the passports with the 'base contact' and consider taking a copy with them on the trip; particularly if the young people are carrying their own passport.

Passports which are lost or stolen overseas can be replaced. The Group Leader should report the loss to the local police and the nearest British Embassy, High Commission or Consulate.

Sufficient time should be allowed, which can be as much as several months for large groups or certain countries, for group members to obtain any visas that will be needed for the trip.

Establishments should plan for the costs of visas for leaders. See the section 4.8 **Finance** for further information

- **Collective Passports:**

These can be issued to groups of students and youth organisations who plan to travel together on a trip overseas. There can be between 5 and 50 children and young people on a collective passport. Everyone on the collective passport must be under 18 years old upon return to the United Kingdom and must also be British nationals. The passport is issued to the Group Leader and is invalid if they cannot travel. It is essential that a Deputy Group Leader is appointed and named on the collective passport.

Further information is available at [www.passport.gov.uk/](http://www.passport.gov.uk/) or by calling the 24-hour Passport Advice line on 0870 521 0410.

- **Insurance:**

The Group Leader must ensure that the group have sufficient travel and medical insurance cover for the countries that are being visited and the activities that are to be undertaken. See section 4.7 **Insurance** for details and requirements of the EDC Group travel insurance policy.

Countries have different levels of free emergency medical service available for UK travellers and the Department of Health website ([www.dh.gov.uk](http://www.dh.gov.uk)) is a good source of detailed information for individual countries, including the level of reciprocal rights and the potential medical costs involved.

- **EU Health Cards:**

To gain rights to reduced or free state health care in European countries each group member must carry a European Health Insurance Card (EHIC). This will not cover all medical costs though and the Group Leader must ensure that there is appropriate insurance cover in place. For example, air ambulances or some medication costs are often not covered.

Using the card will remove the excess placed by the insurance company upon claims for medical costs in Europe. The card can be obtained via the internet at [www.ehic.org.uk](http://www.ehic.org.uk), by phone 0845 605 0707 or at the Post Office.

- **Medication & Vaccinations:**

The Group Leader must ensure that any medication is clearly marked and identified, ideally in its original packaging. There must be adequate, accessible supplies for the trip, sometimes with prescription documents and, if possible, spare medications as it may be difficult to obtain replacements abroad. They should ensure that any drugs are legal in the country to be visited and in some cases the group member will need to provide a doctor's letter for customs officials.

Group Leaders should remind group members to ensure that all their standard vaccinations are up-to-date. Group members may need booster shots or new vaccinations if visiting certain countries. Possible vaccinations that may be needed include hepatitis A, diphtheria,

typhoid, hepatitis B, rabies or tuberculosis. Group members should take advice from their GP. An excellent source of up-to-date advice can be found at [www.fitfortravel.nhs.uk](http://www.fitfortravel.nhs.uk).

Establishments should plan for the costs of vaccinations and anti malarial medication for leaders. See the section 4.8 **Finance** for further information

- **Cultural, Legal and Safety Differences:**

The Group Leader must allow for sufficient time to prepare the participants for any significant differences between the UK and the country that they are visiting. This will include:

- Background to the trip and the places they will be visiting.
- Basic foreign words, where appropriate.
- Safety aspects such as traffic rules or water quality.
- Cultural differences relating to clothing or acceptable behaviour.
- Legal differences, such as alcohol or drugs laws.
- Customs regulations for the countries that they are travelling to or through including any possible punishments for carry illegal items.

- **Adventurous Activities and Treks Overseas:**

Activities overseas are not commonly subject to the licensing and qualification schemes that are current in the UK. Heads of establishment will need to be satisfied that any activities are run appropriately and suitable for the participants. Parents should be made aware of any significant differences in standards when compared to delivery in the UK.

It is advisable to use a UK based provider or expedition company who either use their own staff to run the activities or have rigorous safety audits of the local provider.

Group Leaders must refer to the procedure manual 4/01 '**Outdoor Learning & Adventurous Activities - A Code of Practice**', which contains a matrix of the appropriate qualifications for UK leaders or supervisors and the standards for delivering expeditions and activities abroad

The quality and experience of the trek leaders is vital to its success and Group Leaders should not be afraid to ask for a different leader if the one offered is not deemed suitable for any reason. For example, limited country experience, a lack of relevant qualifications or insufficient experience of leading at high altitude.

Establishments should consider the cost of any necessary medication or injection at an early stage of the planning. The costs should be borne by the group as a whole or the establishment

Sufficient time must be spent training the participants to a level where they are ready to embark upon overseas treks.

Further detailed advice should be sought from the ESO for specific trips or providers.



## 6.10 EXCHANGE VISITS

Exchanges can provide additional opportunities to experience first hand, life and cultures in other countries. Whilst many of the planning issues will be same for other overseas excursions there are a number of significant issues, mostly relating to the home stays and host families on exchanges. External providers can assist group leaders manage an exchange visit but many schools have run very successful exchanges, built upon long standing relationships with partner schools overseas.

Hosts and their families needs to be a suitable 'pairing' for the visiting young person with respect to their age, gender or cultural background. The host family must be able to care for the young person and any requirements they have. This may include medical, religious or dietary needs. The host family must be willing, and have the necessary skills, to support any young person in their care with additional support needs.

Host families need to be provided with information detailing the expectations placed upon them and the standards of behaviour that they can expect from their guest during the visit. They should be provided with contact details for emergencies.

The Scottish Government guidance states that. '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'.

Group Leaders should refer to the relevant Generic Risk Assessment and complete a specific assessment for their own exchange.

- **Outings and Free Time with Host Families:**

The host family must be aware of what are suitable activities or outings, including any high risk activities that may not be allowed. Parents should be aware of what activities are planned on any exchange.

- **Vetting of Host Families:**

Exchange or home stay visits can be arranged through agencies, in which case, the agency should have responsibility for vetting the host families. 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 Scottish Government endorses the guidance 'The Protection of Young People in the Context of International Visits' 2002 and details of this can be found in Part 8 **Further Reading**.

## **PART 7 - FORMS AND EXAMPLES**

This section contains a selection of standard EDC Forms that should be used by establishments and examples of other useful documents. To ensure continuity amongst Services if an establishment wishes to change a standard form or generic risk assessment then they should make a request to their respective Head of Service, who will liaise with the Educational Visits Officer.

- **EDC Standard Forms:**

EV1	Approval for Day Excursions,
EV2 Part A	Initial Permission to plan Residential or Overseas Visits, Exchanges or Adventurous Activities
EV2 Part B	Final Approval for Residential, Overseas Visits, Exchanges or Adventurous Activities
EV3	Generic Parental Consent Form
EV4	Group Personnel Injury & Travel Insurance Summary

- **Examples that can be used directly or adapted as appropriate:**

EV5	Planning Guide for Group Leaders
EV6	Example of a Group Leader's basic checklist
EV7	Example of a Group Leader's detailed checklist
EV8	Checklist for Heads of Establishments
EV9	Example of a Residential Daily record sheet
EV10	Example of a checklist for Group Members
EV11	Sample letter for a parent helper or volunteer
EV12	Evaluation Form for a visit or activity

- **Example of a Generic Risk Assessment:**

Example of a Generic Risk Assessment completed for a specific outing.

**APPLICATION FOR DAY EXCURSION OR  
ACTIVITY, INCLUDING BLOCKS OF SPORTS**

1. **Establishment or Team:** \_\_\_\_\_

Activity and locations being visited:  
\_\_\_\_\_

**Aims of outing** (please state the proposed learning outcomes and how the learning links to the key curriculum areas): \_\_\_\_\_

Name of any organising company or provider: \_\_\_\_\_

Date/s: \_\_\_\_\_ Time/s: \_\_\_\_\_

2. **Names, relevant experience, qualifications and specific responsibilities of leader or volunteers in the party:**

Group Leader: \_\_\_\_\_ Mobile: \_\_\_\_\_

Competences: \_\_\_\_\_

Other Leaders: \_\_\_\_\_  
\_\_\_\_\_

Existing knowledge of places to be visited: \_\_\_\_\_

Has a **risk assessment** been carried out: Yes / No

3. **Size and composition of the group:**

Age range: \_\_\_\_\_ M: \_\_\_\_\_ F: \_\_\_\_\_ Leader/participant ratio: \_\_\_\_\_

4. **Transport arrangements:** Include the names of the transport companies to be used: \_\_\_\_\_  
\_\_\_\_\_

5. **Finance:** Proposed financial costs and Insurance arrangements: \_\_\_\_\_  
\_\_\_\_\_

6. Has sufficient **information** been provided for the parents & have **consent forms** been completed? Yes / No

7. **Medical & Welfare:** Names of participants with additional support needs, medication and brief details: (Attach additional information as necessary)  
\_\_\_\_\_  
\_\_\_\_\_

**8. Emergency Base Contact:**

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Work Tel: \_\_\_\_\_ Out of hours contact: \_\_\_\_\_

**9. Group Leader :**

I request your approval for this excursion or activity, details of which are outlined above.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**10. Head of Establishment:**

Having studied this application, including the planning, organisation, staffing, risk management, financial commitment and adherence to EDC policy:

Approval is given / not given

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**APPLICATION FOR INITIAL PERMISSION TO  
 PLAN RESIDENTIAL OR OVERSEAS VISITS,  
 EXCHANGES OR ADVENTUROUS ACTIVITIES**

1. **Establishment:** \_\_\_\_\_

2. Reason for **activity or excursion** and main locations to be visited: \_\_\_\_\_

\_\_\_\_\_

3. Details of any **adventurous activity** planned or hazardous locations to be visited:

\_\_\_\_\_

4. **Departing on:** \_\_\_\_\_ **Returning on:** \_\_\_\_\_

5. **Mode of travel:** \_\_\_\_\_

<b>6. Proposed participating numbers:</b>	Male	Female
(a) Pupils	_____	_____
(b) Supervising Leaders	_____	_____
(c) Volunteers	_____	_____

7. **Type of accommodation:** \_\_\_\_\_

8. **Group Leader:**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Designation: \_\_\_\_\_

9. **Head of Establishment:**

Permission for the proposed educational excursion or activity is granted / not granted, in principle.

Please continue to plan this excursion, keeping me up-to-date with developments and subsequently return to me the completed form EV2B.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## APPLICATION FOR THE APPROVAL OF RESIDENTIAL OR OVERSEAS VISITS, EXCHANGES OR ADVENTUROUS ACTIVITIES

- This application form will provide essential information to the head of establishment, before they decide on the final approval of an excursion or activity. Not all sections will be relevant to every proposed excursion or activity.
- Any subsequent changes or additions in planning, organisation, staffing etc must be communicated to the head of establishment for approval.
- Attach group lists, additional medical information and itineraries to this form as appropriate.

**1. School Name:** \_\_\_\_\_

**2. Type of activity or excursion:**

Purpose of proposed visit and specific educational objectives: \_\_\_\_\_

\_\_\_\_\_

Details of the programme and excursions planned: \_\_\_\_\_

\_\_\_\_\_

Name of any organising company or activity provider: \_\_\_\_\_

Details of any hazardous activity and the associated planning, organisation and staffing:

\_\_\_\_\_

\_\_\_\_\_

**3. Leadership Team:**

Names, relevant experience, contact number, PVG date of issue and specific responsibilities of leaders or volunteers in the party.

Group Leader: \_\_\_\_\_ PVG Issue Date: \_\_\_\_\_ Mobile No: \_\_\_\_\_

Other Staff: \_\_\_\_\_ PVG Issue Date: \_\_\_\_\_ Mobile No: \_\_\_\_\_

Other Staff: \_\_\_\_\_ PVG Issue Date: \_\_\_\_\_ Mobile No: \_\_\_\_\_

Other Staff: \_\_\_\_\_ PVG Issue Date: \_\_\_\_\_ Mobile No: \_\_\_\_\_

Volunteer: \_\_\_\_\_ PVG Issue Date: \_\_\_\_\_ Mobile No: \_\_\_\_\_

Volunteer: \_\_\_\_\_ PVG Issue Date: \_\_\_\_\_ Mobile No: \_\_\_\_\_

Volunteer: \_\_\_\_\_ PVG Issue Date: \_\_\_\_\_ Mobile No: \_\_\_\_\_

Existing knowledge of places to be visited: \_\_\_\_\_

\_\_\_\_\_

4. Has a **Risk Assessment** been carried out ? Yes / No

5. **Dates and times:**

Departure Date: \_\_\_\_\_ Return Date: \_\_\_\_\_

6. **Group:** Size and composition of the pupils & young people:

Year groups: \_\_\_\_\_ M: \_\_\_\_\_ F: \_\_\_\_\_ Leader ratio: \_\_\_\_\_

7. **Accommodation:**

Venue Name/s: \_\_\_\_\_ Telephone: \_\_\_\_\_

Address: \_\_\_\_\_

Contact name for venue or provider: \_\_\_\_\_

8. **Transport arrangements:** Include the names of the transport companies used:

\_\_\_\_\_

Is the transport organised by the Group Leader or by the tour company?

\_\_\_\_\_

9. **Finance:** Proposed financial costs and Insurance arrangements: \_\_\_\_\_

\_\_\_\_\_

10. **Medical and Additional Support Needs:** Names of persons with additional support needs, those requiring any medication and brief details of how these individuals will be supported: Attach additional information as necessary.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

11. Has **information** been provided for the parents & have **consent forms** been completed?

Yes  No

**12. Emergency Base Contact:**

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Work Tel: \_\_\_\_\_

Mobile: \_\_\_\_\_

**13. Group leader:**

I the Group Leader request your approval for this excursion or activity, details of which are outlined above.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**14. Head of Establishment:**

Having studied this application, including the planning, organisation, staffing, risk management, financial commitment and adherence to EDC policy;

I do / I do not grant approval for this excursion.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**15. For category 3 trips send a copy of this form to Business Support - Team A in Southbank House.**

For category 4 excursions and activities send a copy of this form to the **Head of Service**.

<b>Category</b>	<b>Activities</b>
Category 3	<ul style="list-style-type: none"><li>▪ All UK residential and overnight visits.</li><li>▪ All non adventurous overseas visits and exchanges (See note 4).</li><li>▪ All Adventurous Activities led by EDC approved &amp; AALA licensed outdoor providers (See note 4).</li></ul>
Category 4	<ul style="list-style-type: none"><li>▪ Overseas expeditions, trekking and Adventurous Activities (See notes 4 &amp; 5).</li><li>▪ All Adventurous Activities led by EDC staff or volunteers (See notes 4 &amp; 5).</li><li>▪ Duke of Edinburgh Expeditions (See note 6).</li></ul>



**PARENTAL / GUARDIAN CONSENT FORM**

This consent form relates to \_\_\_\_\_ who  
attends: \_\_\_\_\_ (school or group)

Who will take part in the following activity or excursion to:

\_\_\_\_\_

from: \_\_\_\_\_ date/time: \_\_\_\_\_

to: \_\_\_\_\_ date/time: \_\_\_\_\_

**Medical Information:**

(a) Does your son/daughter suffer from any conditions requiring medical treatment, including medication?  
If YES, please give details, including the description of the medication and its dosage.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(b) To the best of your knowledge, has your son/daughter been in contact with any contagious or infectious diseases or suffered from anything in the last four weeks that may be or become contagious or infectious?  
If YES, please give brief details.

\_\_\_\_\_  
\_\_\_\_\_

(c) Is your son/daughter allergic to any medication? If YES, please specify.

\_\_\_\_\_  
\_\_\_\_\_

(d) Has you son/daughter received a tetanus injection in the last ten years? YES / NO

If YES, please give date of last injection: \_\_\_\_\_

I undertake to inform the Group Leader/Head of Establishment as soon as possible of any changes in the medical circumstances between the dates on which this form is signed and the commencement of the excursion.

Please outline below any **Special Dietary Requirements:**

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**Water based activities:**

For excursions which involve swimming or include activities, such as canoeing, where being able to swim may be part of the activity, please answer the following questions

- Is your child able to swim 50m? YES / NO
- Is your child confident in a pool? YES / NO
- Is your child confident in the sea or open water? YES / NO
- Is your child safety conscious in water? YES / NO

I give consent for my child to participate in the stated swimming or water based activity having understood the information provided regarding the activity and venue. YES / NO

**Contact Details:** I may be contacted by telephoning the following numbers:

Home: \_\_\_\_\_ Work: \_\_\_\_\_ Mobile: \_\_\_\_\_

My home address is: \_\_\_\_\_

---

If not available, in an emergency please contact:

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Home: \_\_\_\_\_ Work: \_\_\_\_\_ Mobile: \_\_\_\_\_

Name of family doctor: \_\_\_\_\_ Telephone: \_\_\_\_\_

Address: \_\_\_\_\_

**Declaration:**

I agree to \_\_\_\_\_ taking part in the above-mentioned visit or activity and, having understood the information provided, agree to his/her participation in any of the activities described.

I acknowledge the need for obedience and responsible behaviour on his/her part. I understand that I may be held accountable for reasonable costs occurring from his/her early return home from the trip due to his/her conduct.

I agree to my son/daughter receiving emergency medical treatment as considered necessary by the medical authorities present.

I accept that relevant information on this form may need be shared with appropriate medical staff or activity providers as required for the safe provision of the activity.

I understand the extent and limitations of the insurance cover provided.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Full name: \_\_\_\_\_

## GROUP PERSONAL INJURY & TRAVEL INSURANCE COVER

**INSURED PERSONS:** The insurance cover applies to any person participating in an educational excursion or work experience arranged by EDC departments

### SUMMARY OF BENEFITS

<b>INSURERS:</b> ACE EUROPE <b>POLICY NO:</b> 55UK476571 <b>EXPIRY DATE:</b> 30 / 04 / 2015	<b>CATEGORY A –</b> Persons aged under 18 years old	<b>CATEGORY B –</b> Persons aged 18 years to 75 years old
Death	£20,000 (Limited to £5,000 for pupils under 16 years of age)	£20,000
Permanent Disabling injuries	up to £20,000	up to £20,000
Personal Accident – Temporary Total Disablement	£5 per week ( Pupil under 16 years) £20 per week ( Pupil aged 16 – 18 years)	£50 per week ( Benefit period up to 104 weeks)
Personal Accident – Temporary Partial Disablement	Nil	Nil
Dental expenses	£1000	£1000
Medical Expenses	Unlimited	Unlimited
- supplementary travel & accommodation	£15,000	£15,000
Cancellation/Curtailment	£10,000	£10,000
Personal Belongings	£2,500	£2,500
Max. limit any one article, pair or set	£250	£250
Personal Belongings delay	£450	£450
Money (including that held for other person by over 18's)	£2000	£2000
Personal Liability	£5,000,000	£5,000,000
Max. aggregate limit per excursion	£5,000,000	£5,000,000

- The following excesses will apply in respect of each and every claim per Insured Person:
 

(a) Medical Expenses	£15	
(b) Cancellation /Curtailment	£15	<i>Aggregate limit per excursion of £50,000. Excludes all sports equipment in use except for skis and all camping equipment, boats &amp; sailing boards at any time.</i>
(c) Personal Belonging/Money	£15	
  
- Cover is subject to the normal terms, conditions and exclusions outlined in the policy;
- Participants must not travel against the advice of a qualified medical practitioner;
- All losses of personal belongings or monies must be reported to police, hotel; management or transport carrier within 48hrs;
- The duration of educational excursions must not exceed 31 days.

## GROUP LEADERS PLANNING GUIDE

This short guide aims to give you points to work through when planning your trip. There is detailed information in the Code of Practice on all the points highlighted here. Contact the Outdoor Education Officer (0141 578 8728) for advice or help with organising your trip or activity.

1. Undertake sufficient research to allow you to fill out the appropriate **approval form** for your head teacher or manager to sign. Consider the suitability of the activities or venue for all the young people and leaders who will be eligible to come.
2. Gather a **leadership team** which has the right experience and qualifications to assist you with the **supervision** on the trip you are planning. This may be experience on similar trips, **First Aid** skills or outdoor qualifications. Consider nominating a deputy leader. Plan your **transport** needs which may include hiring coaches, booking flights or hiring mini buses (have you got an EDC assessed driver to drive the minibuses?) Are you using an educational **tour operator** or managing the trip yourself?
3. Excursion **Risk Assessment**. Prepare a specific assessment of the significant risks. The Authority has produced Generic risk assessment pro forma's for many types of trips that can assist you in this process. This may involve finding out more details about the activity or venue and considering some emergency and contingency plans.
4. Fill out the appropriate **Approval Forms**.
  - **EV 1** - day or part day activities, regular clubs or after school activities.
  - **EV 2** - UK residential, overseas excursions & staff led outdoor activities.
 EV 2 has two parts:  
 In Part A the Head gives initial approval to allow you to go ahead and start planning the trip or activity; for some overseas trips this may start over one year ahead. Part B can be filled out when you have all the details to present. EV 2 Part B will also need to be sent into your departments HQ to allow them to monitor all residential trips. Forms relating to overseas trips will be countersigned by the Head of Service. The department will write back to your establishment acknowledging that they have received your form and that the Head of Service has countersigned the any overseas trips.
 

**Ratios:** The minimum ratios for:

  - Extra curricular team games & related travel is 1:20
  - UK day and residential excursions is 1:12
  - Overseas trips are 1:10
5. Send out your **information to Parents** informing them, for example, of the activities involved, things to pack or things not to bring, behavioural expectations, transport plans, the **financial** and **insurance** details and emergency contact details. Collate the **Consent forms** and, where appropriate, update your risk assessment and Head of Establishment
6. Leave suitable information with the **base contact** ~ this may be the Head of your establishment or office depending upon the nature of the trip. They will need to know, for example, who is going, including staff, the itinerary, contact details for you and the venue.

7. Ensure that you have all the information you may need with you, (group lists, consent form, contact details for the other leaders & your base contact, venue & transport details) and also any medication, contingency funds, mobile phone etc.
8. Enjoy the trip or activity. Hopefully you won't need them but now your **contingency plans** or the use of **dynamic** (unwritten, 'on the ground') **risk assessments** may come into play. Report back to your base contact on your return.
9. If any accident, 'near miss' or significant incidents occur on the excursion then report these (using Form PER1) to the Head as soon as practical. This will enable any investigations to take place while things are fresh in your mind.
10. Report to your Head of establishment how things went, not forgetting to ask how the young people felt about the trip. An example of a **Review Form** is in Section 7 of this procedure.
11. Store the approval form and group list & original consent forms correctly and destroy all copies of personnel data, as per the EDC **Data Protection** policy.
12. Have a well earned break and, hopefully, consider doing another trip next year!

**GROUP LEADERS BASIC CHECKLIST**

Group Leader: \_\_\_\_\_ Excursion: \_\_\_\_\_

	YES	NO	N/A
Approval form completed			
Risk Assessment discussed, actioned, signed and left with Head Teacher			
Information provided to parents, including itinerary, insurance details, Consent Forms ~ Originals consent forms carried by teacher in charge, copies left with Base Contact or in office ~ On Residential outings HT must be given copies			
Group lists for parent helpers ~ Copy of group list left in office			
List of medical needs and medication required to be taken on outing. ~ Copy to be left in office			
Medication checked and safely stored			
First Aid Kit/s			
List of School contact telephone numbers ~ school information card			
School Mobile Phone ~ Check charge & credit day before			
Cash, if required			
Tickets, if applicable			
Packed Lunches			
Rubbish Bags			
Do children wear school uniform? (Discuss with SMT)			
School Badges for Pupils ~ Nursery and P1-P4 classes			
Name Badges for Parent Helpers			
Materials e.g. worksheets / pencils			
Games Equipment, if required			
Evaluation form completed on return and passed to HT			

**GROUP LEADERS OFF SITE ACTIVITY & EXCURSION CHECKLIST**

**1. Details of Excursions:**

.....  
 .....

**2. Date of activity:**

.....  
 .....

**3. Activity or excursions Location:**

.....

	Yes	No	N/A
Has the venue or provider been audited or visited previously			
By whom			

**4. Names of Leadership team**

Deputy Leader:

.....  
 .....

Other Supervisors:

.....  
 .....

Volunteer helpers:

.....  
 .....

Have volunteers signed an appropriate code of conduct / information letter?			
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**5. Transport**

Merkland Mini Bus booked			
Approved driver(s)			
EDC transport booked			
Is the transport accessible for group members?			
Has any external transport been ordered from the approved list of providers?			
Has any mini buses been hired from EDC Fleet services?			

**6. Information sent to Parents**

Aim of excursion			
Venue or activity details			
Itinerary, including levels of supervision & any alternative plans			
Staff or volunteers involved			
Code of Conduct / behaviour expectations / repercussions			
Financial & Insurance details, including spending money information			



Clothing, lunch or other items required or excluded			
Policy on mobile phones or other electronic items			
Consent & Welfare forms			
Swimming Consent form			
Emergency Contact details			
Date of parents meeting			

### 7. Parental Consent & Pupil Information

Original consent & welfare forms checked & carried by Group leader			
Copies left with Base Contact			

### 8. Medical need & First Aid (Pupils and staff)

The Appointed Person or First Aider on trip is			
First Aid Kit carried			
Pupil medical equipment or supplies checked			
Staff member responsible for above			
EDC PER1 Accident report form(s) taken			

### 9. Finance & Insurance

Have all monies been collected			
Booking confirmed with provider or venue			
Cash taken, if required			
Contingency funds			
Tickets or other documents checked			
EDC travel insurance			
Provider travel insurance			
Does the policy chosen provide cover provide for the activity, location.			
Have the insurers been informed of any pre existing medical conditions, if required			

### 10. Miscellaneous

Packed Lunches			
Do children wear school uniform?			
School Badges for Pupils			
Name Badges for Leaders or volunteers			
Materials e.g. worksheets / pencils			
Games Equipment			

### 11. Risk assessments & Planning

Has an activity or excursions Risk Assessment been carried out			
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Has a Risk Assessment covering all transport been carried out			
Have the RA's and the control measures been discussed with the leadership team			
Has there been sufficient team planning meetings or briefings, involving all members of the leadership team			
Do all leaders understand their roles & responsibilities, including any specific pupils or emergency plans			
Contact details for school & group leader passed to all leaders			
School mobile phone available (with credit & charge)			

## 12. Approval Forms

Outline Approval form EV2A completed for residential trips			
Approval form completed EV1 or EV2B			
Residential Approval form EV2B sent to Southbank House			

Group Leader: .....

Date: .....

Head teacher: .....

## 13. Evaluation & Follow up

Evaluation form completed on return from excursions and passed to HT			
Are there any changes that need to be made to the school RA's as a results of the evaluation or any significant incidents on the excursion			

**CHECKLIST FOR HEADS OF ESTABLISHMENTS**

1. Are there clearly understood educational aims for the excursion, which are understood by staff, young people and parents?
2. Is the Group Leader competent to lead the specific trip, through prior experience, training, recognised NGB awards or internal EDC assessments?
3. Are the supporting leaders or volunteers involved suitable, competent and fully aware of their own roles and responsibilities?
4. Has a preliminary visit taken place to ensure that the activity and venue are suitable for the specific young people taking part, or does prior experience indicate an assessment to that effect?
5. Have any additional support or medical needs been sufficiently assessed and measures put in place to deal with and finance these?
6. Has the venture been sufficiently Risk Assessed with Control Measures robustly put into place?
7. Are all leaders or volunteers, and where appropriate, young people and parents, aware of any significant risks and how they are being managed?
8. Is there sufficient First Aid provision in place?
9. Is there a suitable ratio of staff to young people, taking account of the activity and the group's abilities and ages, ensuring sufficient supervision at all times whilst on the trip?
10. Has the external provider been assessed as suitable either by the Educational Visits Officer or by competent staff within the establishment?
11. If the activities are being delivered by your own establishment, is any equipment being used suitable for the task and with evidence of checking and maintenance by a competent person. e.g. camping stoves or canoeing equipment?
12. Has the sufficient information been given to young people and parents, including consent forms, medical needs forms, insurance information, financial implications, code of conduct, an itinerary, clothing lists and emergency contact details?
13. Is the transport suitable for the venture, including any private vehicles and have any establishment mini bus drivers been assessed by EDC fleet.
14. Is there sufficient insurance and financial protection in place for the type of excursion planned?
15. Are there sufficient emergency plans in place covering incidents such as, delayed return, transport issues, medical emergencies and are there suitable staff contactable at 'base' with the necessary information and knowledge to support those 'in the field'?

16. Has sufficient time been allowed for the preparation of the visit or activity, including notifying other colleagues or departments whom it may affect?
17. Have the approval forms been completed and authorised and competent advice taken where expertise is not held within the establishment?
18. Have arrangements been made for sufficient review and evaluation of the trip, examining if its original outcomes were met, to share good practice and learn from any problems that occurred?

**RESIDENTIAL EXCURSIONS DAILY LOG**

Venue:	Date:	Group Leader:
Write a brief record of the day noting incidents, pupil behavioural, welfare or medical issues.		

## CHECKLIST FOR GROUP MEMBERS

### Do I know the answers to the following questions?

1. Who is my Group Leader?
2. Where I am going to visit and what activities I will be taking part in?
3. How can I contact my Group Leader?
4. What will be done to keep me safe and secure, including any precautions I must take?
5. How to use the phone if help is required?
6. What I should do if I become lost or into difficulties when not with the Group Leader?
7. What is in the Code of Conduct?
8. How to keep my money and valuables safe?

### For Residential Visits and Exchanges

9. Where I will be staying?
10. How I should behave (house rules) where I am staying?
11. Where I am to sleep and change?
12. What to do if I am worried or unhappy about anything when staying with my host family?

**PARENT HELPER OR VOLUNTEER**  
**LETTER**

Dear \_\_\_\_\_ I am pleased to accept your offer of help on the outing  
to \_\_\_\_\_ with \_\_\_\_\_ Primary class on \_\_\_\_\_  
We will leave the school at \_\_\_\_\_ and expect to return by \_\_\_\_\_

Please go to the class about 15 minutes before the planned departure time.  
At this time you will be issued with a list of children in your group.  
Having read the following school guidelines; sign, date and return the tear off slip to me.

**Parent Helper Guidelines**

Parent helpers will assist with **no more** than 10 pupils. Parent helpers will:

1. Be issued with the names of these pupils.
2. Escort designated pupils from the school building onto the bus – making sure they are helped onto and out of the bus.
3. Escort pupils during the outing under the direction of the class teacher.
4. Distribute material to the group under the direction of the class teacher, if required.
5. Assist the teacher in maintaining a high standard of behaviour.
6. Distribute snacks / packed lunches and collect rubbish.
7. Inform class teacher if they are taking an individual or group of children to the toilet/shop etc.
8. Assist class teacher in boarding bus for return journey – as before.
9. Inform class teacher if a child is feeling ill at anytime during the outing (including on the bus).
10. Check that the members of their group have taken everything off the bus.
11. On return, escort designated pupils from the bus back into the classroom.
12. Assist class teacher during the dismissal of the class from the classroom – if out with normal school hours.
13. Parents are requested not to smoke in the company of the children.

In order that I can finalise the arrangements for the outing, please complete and return the accompanying tear off slip. Your offer of help is much appreciated and we look forward to a successful outing.

Yours sincerely

✂✂✂✂.....  
.....

**Parent Helper Return Slip**

Dear \_\_\_\_\_ I confirm that I have received the parental guidelines and the  
arrangements for the outing to \_\_\_\_\_

And confirm that I will accompany the class on \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## EVALUATION OF THE EXCURSION OR ACTIVITY

Establishment: \_\_\_\_\_ Group Leader: \_\_\_\_\_

Number Young People: \_\_\_\_\_ Supervisors: \_\_\_\_\_ Year group \_\_\_\_\_

Date(s) of Excursion: \_\_\_\_\_ Purpose(s) of Excursion: \_\_\_\_\_

Venue: \_\_\_\_\_ Provider: \_\_\_\_\_

Please comment on the following features	Rating			Comments
	☺	☹	☹	
The venue's or provider's organisation				
Travel arrangements and quality				
Content of programme provided				
Quality of instruction				
Equipment				
Quality of facilities				
Accommodation				
Food				
Evening or free time activities				
Leaders or other staff				
Other comments and evaluation				

- Report any significant findings to the Educational Visits Officer and update the establishment Risk Assessment, as necessary.
- Share this form with key stakeholders and store in the establishment's records for future reference.

Group Leader: \_\_\_\_\_ Date: \_\_\_\_\_



## HEALTH AND SAFETY RISK ASSESSMENT

### Generic Risk Assessment for Educational visits to, Museums, Art Galleries, Science Centres, Visitor centres and similar Attractions

This Risk Assessment highlights commonly identified hazards, with appropriate control measures, that can be associated with the above location. The Group Leader can adapt it to a specific group or trip by going through the listed controls, action relevant ones and add any additional control measures needed. A risk rating specific to the trip can then be added in the final column. See the final page for Risk Rating summary and action list.

Activity or Location	Hazards	Potential Risk of or Loss	Persons at Risk	Control Measures ( boxes ticked if the control is in place for this trip)	Generic Risk	Additional Specific Control measures	Specific Risk
Transport	1. Access & egress of transport to venue	<ul style="list-style-type: none"> <li>Minor/major injury ~ fatality</li> <li>Slips trips, &amp; falls</li> </ul>	Public, Pupils & Staff	<input checked="" type="checkbox"/> Appropriate control of entry & exit, use of walkways. <input checked="" type="checkbox"/> See Generic Transport Risk Assessment	5 (1x5)	<ul style="list-style-type: none"> <li>Group leader ( Miss Smith) has filled out assessment</li> </ul>	5 (1x5)
At all times	1. General use of site and building 2. Engagement with exhibits or activity	<ul style="list-style-type: none"> <li>Slips, trips and falls</li> <li>Minor/major injury</li> <li>Distress</li> </ul>	Pupils & staff	<input checked="" type="checkbox"/> Appropriate supervision for venue and pupils <input checked="" type="checkbox"/> Exhibits suitable for groups age, cultural background and development <input checked="" type="checkbox"/> Knowledge of site by staff <input type="checkbox"/> Pupils aware of behavioural expectations <input checked="" type="checkbox"/> Staff aware of roles and responsibilities, including and volunteer helpers	8 (2x4)	<ul style="list-style-type: none"> <li>three previous visits by Group leader</li> <li>Code of conduct agreed with pupils</li> <li>Team talk for all involved</li> </ul>	8 (2x4)
At all times	1. General use of site 2. Members of public. 3. Potentially complex & busy sites	<ul style="list-style-type: none"> <li>Lost or separated pupils</li> <li>Child protection issues ~ use of toilets, etc</li> </ul>	Pupils	<input checked="" type="checkbox"/> Ratio's minimum as per EDC guidelines <input checked="" type="checkbox"/> Agreed meeting points if separated <input checked="" type="checkbox"/> Use of 'head counts' <input checked="" type="checkbox"/> Follow EDC CP guidelines <input checked="" type="checkbox"/> Appropriate training & vetting of staff or volunteers. <input checked="" type="checkbox"/> Awareness of venue vetting policy, if appropriate	4 (1x4)	Actual ratio for group: 1: 6 <ul style="list-style-type: none"> <li>Front reception desk</li> <li>Recent CP training for staff</li> <li>Education officer is helping with visit is enhanced Disclosed</li> </ul>	4 (1x4)

Activity or Location	Hazards	Potential Risk of or Loss	Persons at Risk	Control Measures	Generic Risk	Additional Specific Control measures	Specific Risk
At all times	1. Medical conditions 2. Minor injury or illness	<ul style="list-style-type: none"> <li>Allergies &amp; reactions</li> <li>Conditions such as asthma</li> </ul>	Pupils & staff	<input checked="" type="checkbox"/> Appropriate First Aid provision available <input checked="" type="checkbox"/> Relevant medical information carried by Party leader and shared as required. <input type="checkbox"/> Leadership team have skills to cater for any specific requirements (e.g. Epi pens) <input checked="" type="checkbox"/> Medication is available at all times and spares carried as necessary	5 (1x5)	<ul style="list-style-type: none"> <li>Mrs A has emergency First aid training</li> <li>Miss Smith has talked to team about one pupil who needs an Epi Pen</li> <li>All staff had Epi Pen training at 'in service' day</li> <li>All physically checked as pupils get onto bus Miss S. carries spare Epi Pen</li> </ul>	5 (1x5)
At all times	1. Personal security & belongings	<ul style="list-style-type: none"> <li>Loss of personal belongings</li> </ul>	Pupils & staff	<input checked="" type="checkbox"/> Only bring low value & necessary items.	2 (1x2)	<ul style="list-style-type: none"> <li>Letter to parents ~no mobiles</li> <li>Copy of insurance sent out with consent form</li> </ul>	2 (1x2)
Lunch & snacks	1. Use of catering venues 2. Certain exhibits or activities	<ul style="list-style-type: none"> <li>Illness</li> <li>Allergies</li> <li>Cross infection</li> </ul>	Pupils & staff	<input checked="" type="checkbox"/> Hand washing before lunch if appropriate <input checked="" type="checkbox"/> Use of suitable catering facilities or pupils bring own lunch <input checked="" type="checkbox"/> Awareness of group medical conditions .e.g. nuts allergies	4 (1x4)	<ul style="list-style-type: none"> <li>Pupils reminded but are mature enough to do this themselves</li> <li>All bring packed lunch</li> <li>Letter home asked for no foods with nuts as one pupil has severe allergy.</li> </ul>	5 (1x5)
With in venue	1. Periods of any remote supervision	<ul style="list-style-type: none"> <li>Lost or separated pupils</li> <li>Increased exposure to all highlighted hazards &amp; risks in this RA document</li> </ul>	Pupils	<input checked="" type="checkbox"/> Appropriate for venue and pupils <input checked="" type="checkbox"/> Pupils to remain in groups & use of 'buddy' system <input checked="" type="checkbox"/> Agreed meeting points & 'check in' times. <input checked="" type="checkbox"/> Pupils know how & where to contact staff <input checked="" type="checkbox"/> Parent aware of level of supervision planned	10 (2 x5)	<ul style="list-style-type: none"> <li>Small group of well behaved pupils</li> <li>Talk to pupils prior to visit</li> <li>Only given 1 hr to do research work on their own</li> <li>1 member of staff always at foyer café</li> <li>plan outlined in parents letter</li> </ul>	10 (2 x5)

Activity or Location	Hazards	Potential Risk of or Loss	Persons at Risk	Control Measures	Generic Risk	Additional Specific Control measures	Specific Risk
Venues with /near water features	1. Ponds, fountains water, streams etc. 2. Some exhibits	<ul style="list-style-type: none"> <li>Drowning</li> </ul>	Pupils & staff	<input type="checkbox"/> Ensure that venue is suitable for group, with additional supervision when near water. <input type="checkbox"/> Set clear boundaries or 'no go' areas	5 (1x5)	<ul style="list-style-type: none"> <li>Well behaved small group. Only water is small pond outside building</li> </ul>	4 (1x4)
Times outside	1. Weather	<ul style="list-style-type: none"> <li>Cold &amp; wet pupils</li> <li>Sun over exposure</li> </ul>	Pupils & staff	<input type="checkbox"/> Take appropriate clothing for venue and forecast <input checked="" type="checkbox"/> Have a Plan B in case of bad weather <input type="checkbox"/> Group have suitable sun protection & <input checked="" type="checkbox"/> water available	3 (1 x3)	<ul style="list-style-type: none"> <li>Only indoor venue. Pupils still have coats</li> </ul>	2 (1x2)
Adventure play areas. Venue managed amusement areas & rides	1. Equipment failure 2. Other users 3. Height of equipment	<ul style="list-style-type: none"> <li>Slips &amp; trips.</li> <li>Collision.</li> <li>Entrapment,</li> <li>Falls from Height,</li> <li>Abrasions</li> </ul>	Participants	<input type="checkbox"/> Set clear boundaries & play times. <input type="checkbox"/> Appropriate monitoring & supervision <input type="checkbox"/> Ensure group is suitable for activity <input type="checkbox"/> Rides controlled by park staff & venue have safety system in place <input checked="" type="checkbox"/>	10 (2 x 5)	No such areas at this venue	N/A
At venue and on journey	1. Emergency incidents, e.g. fire, RTAs. 2. Delays & late back to school	<ul style="list-style-type: none"> <li>Minor / major injury ~ fatality</li> <li>Group back after schools hours,</li> </ul>	Pupils & staff	<input type="checkbox"/> Staff understand & can implement emergency arrangements. <input checked="" type="checkbox"/> Use of reputable venue with appropriate procedures <sup>3</sup> <input checked="" type="checkbox"/> Knowledge of venues and exits. <input checked="" type="checkbox"/> Contact details for school held by all staff. <input checked="" type="checkbox"/> Contact details for group members held by Group leader <input checked="" type="checkbox"/> Mobile phone held by staff <input checked="" type="checkbox"/> Provision at school to cater for	5 (1 x 5)	<ul style="list-style-type: none"> <li>Team talk before visit</li> <li>Centre is run by Glastown Council. School pack sent containing necessary information</li> <li>Pre visit</li> <li>Contact card carried by staff</li> <li>School mobile taken</li> <li>DHT will stay on if needed</li> </ul>	5 (1x5)

<sup>3</sup> Checks can include on evidence of Liability insurance, Risk Assessments. Advice can be taken from KG

				delayed group,			
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**COMPLETION SHEET**

DEPARTMENT: Communities	SECTION: Education	JOB TITLE: OA & EV officer	REPORTS TO: Gordon Currie
Risk = (Likelihood x Severity) Risk Priority Rating: High (16 – 25) Medium (9 – 15) Low (1 – 8) * Risk before control measures in place			
The following points must be implemented before this assessment is complete:			
<ol style="list-style-type: none"> <li>1. Discuss Generic Assessment with staff taking part in the trip.</li> <li>2. Ensure that all Generic Control measures are in place as appropriate.</li> <li>3. Add any additional Control Measures specific to group or venue.</li> <li>4. Reassess Risk rating for specific trip.</li> <li>5. Set a Review date. ( 1 year maximum)</li> <li>6. Contact OA &amp; EV Officer with any queries.</li> <li>7. Head of Establishment to sign form once completed</li> </ol>			
<u>Additional Actions or Training Required</u>		<u>Reference to Actions</u>	
Refresher sessions on Epi pens recently done by all support staff in school			

Generic Assessment by: Kevin Greenfield TITLE Outdoor Activities & Educational Visits Officer DATE: 12-Mar-10 REVIEW: 11-Mar-11

Adapted by: ...Miss Smith..... TITLE....PT Teacher Geography..... DATE; 04 June-10 REVIEW: 03 June-11

For specific excursion: .....S3 trip to Science Centre .....

Head of Establishment .....Mr J Jolly.....

## **PART 8 - FURTHER READING, PUBLICATIONS AND USEFUL CONTACTS**

### **East Dunbartonshire Policies & Procedures**

- Corporate Risk Management Strategy
- Financial Regulations
- Data Protection Policy
- Records Management Policy
- Information Classification and Protection Policy
- Health & Safety Policy {
  - Corporate
  - Community Services
  - Connect
- Accident & Incident Reporting Procedure
- Policy and Procedures for managing Critical Incidents and Trauma
- Outdoor Learning & Adventurous Activities: A Code of Practice

### **Educational Procedures**

- 3/21 Child Protection – Procedures & Guidance
- 3/22 Guidelines for the Management of Incidents of Drug Misuses in Schools
- 3/25 Protection of Children - Checking of Person with Substantial Access to Children
- 3/28 Offers to Provide or Arrange Transport to Sports Centres, Swimming Pools etc
- 3/36 Promoting Good Practise in Child Protection: The appointment of adults to Voluntary ‘childcare’ positions within services managed by East Dunbartonshire
- 6/01 Data Protection Act: A Basic Guide of the Impact upon Educational Establishments
- 7/02 Financial Regulations - *includes details on the use of vehicles*
- 7/03 Insurance for Pupils, Teachers & Other Adults taking part in Educational Excursions & Other Activities
- 9/06 Managing the Healthcare Needs of Pupils: The Administration of Medicines in Schools
- 9/08 Health & Safety in Science Education: A Code of Practice  
Policy on the use of Mobile Phones by Pupils in East Dunbartonshire Schools

### **Social Work Procedures**

EDC Social Work Child Protection Guidelines

## **EXTERNAL SOURCES OF GUIDANCE, REGULATIONS & ADVICE**

### **Outline**

*High Quality Outdoor Education* - The Outdoor Education Advisory Panel. 2005.

*Learning Outside the Classroom Manifesto*. Department for Education and Skills. 2006.  
([www.dfes.gov.uk](http://www.dfes.gov.uk)) Tel: 0845 6022260

Outdoor Connexions Project. Learning and Teaching Scotland. (LTS)  
([www.ltscotland.org.uk/takinglearningoutdoors/index.asp](http://www.ltscotland.org.uk/takinglearningoutdoors/index.asp))

*Outdoor Education in Scotland ~ A summary of Recent Research – 2007* .Scottish Natural Heritage (SNH) ([www.snh.org.uk](http://www.snh.org.uk)) and LTS. ([www.LTScotland.org.uk](http://www.LTScotland.org.uk))

*A guide for OUTDOOR EDUCATORS in SCOTLAND* 1997. Adventure Education  
[www.education.ed.ac.uk/outdoored/research.html](http://www.education.ed.ac.uk/outdoored/research.html)

*Out of Classroom Learning*. Real World Learning Partnership. 2006 c/o Field Studies Council, ([www.field-studies-council.org](http://www.field-studies-council.org)). Tel: 01743 852100

*Taking Learning Outdoors* - Learning and Teaching Scotland. (LTS) 2007.  
([www.LTScotland.org.uk](http://www.LTScotland.org.uk))  
Tel: 08700 100297

Various guidance relating to the Disability Discrimination Act ~ see **The Equality and Human Rights Commission**. <http://www.equalityhumanrights.com>

### **Assessments and Management of Risk**

*A Guide to Risk Assessment Requirements* – Health and Safety Executive (HSE)–  
([www.hse.gov.uk/pubns](http://www.hse.gov.uk/pubns))

*Five Steps to Risk Assessment* – HSE ([www.hse.gov.uk/pubns/indg163.pdf](http://www.hse.gov.uk/pubns/indg163.pdf))

HSE Guidance with regard to school trips ([www.hse.gov.uk/schooltrips/index.htm](http://www.hse.gov.uk/schooltrips/index.htm))

### **Planning and Arrangements**

*Health and Safety on Educational Excursions* - Scottish Government – 2004

*A Practical Guide to Safe School trips* – Scottish School Board Association, 2005

The Suzy Lamplugh Trust has produced a range of guidance on personal safety, including booklets, videos and training courses – ([www.suzylamplugh.org](http://www.suzylamplugh.org))

RoSPA The Royal Society has a range of guidance documents relating to risk & planning

*The Administration of Medicines in Schools* – Scottish Government Education Department  
–  
([www.scotland.gov.uk/library3/education/amis-00.asp](http://www.scotland.gov.uk/library3/education/amis-00.asp))

## **Transport and Travel**

*Minibus Safety: A Code of Practice* – RoSPA and others 2008  
([www.rospa.com/pdfs/road/minibus.pdf](http://www.rospa.com/pdfs/road/minibus.pdf))

## **Standards for Adventure and Specific Excursions**

Adventure Activities Licensing Authority – ([www.aala.org.uk](http://www.aala.org.uk))

*The Countryside Classroom: Guidelines for Farm Visits* – 2005 - Royal Highland Educational Trust

The Duke of Edinburgh's Award has its own clear structure, procedures and guidelines – ([www.theaward.org](http://www.theaward.org))

*Group Safety at Water Margins* – Central Council for Physical Recreation Tel: 020 7976 3900 ([www.ccpr.org.uk](http://www.ccpr.org.uk))

*Health Advice to Travellers Anywhere in the World* – Available free from most Post Offices, travel agents and local libraries or Free Phone 0800 555777

*Scottish Outdoor Access Code*. Scottish Parliament 2004 c/o Scottish Natural Heritage. ([www.outdooraccess-scotland.com](http://www.outdooraccess-scotland.com))

*Outdoor Source Book* – published yearly -The Institute of Outdoor Learning. Tel: 01768 885800 ([www.outdoor-learning.org](http://www.outdoor-learning.org))

*The Protection of Young People in the Context of International Visits* 2002  
Edinburgh City Council Education Department,  
Publications Unit. Tel 0131 469 3328

*Quality, Safety and Sustainability – Field Study Centres: A Code of Practice* – National Association of Field Studies Officers (NAFSO) – ([www.nafso.org.uk](http://www.nafso.org.uk))

The Royal Geographical Society – for advice on overseas expeditions and field studies  
[www.rgs.org/HomePage.htm](http://www.rgs.org/HomePage.htm)

*Safe Practice in Physical Education* – The Association for Physical Education  
([www.afpe.org.uk](http://www.afpe.org.uk))

*Safe and Responsible Expeditions and Guidelines for Youth Expeditions* – Young Explorers Trust, c/o RGS-IBG Expedition Advisory Centre ([www.rgs.org/HomePage.htm](http://www.rgs.org/HomePage.htm))

*The Waterways Code, The Waterways Code for Boaters* and a variety of resources under the banner 'Wild over Waterways' are available from British Waterways – Tel: 01923 201120 ([www.britishwaterways.co.uk](http://www.britishwaterways.co.uk)) and ([www.wow4water.net](http://www.wow4water.net))



## **USEFUL CONTACTS**

### **Government Departments**

#### **Scottish Government Education**

##### **Department**

Schools Division

Victoria Quay

Edinburgh

EH6 6QQ

Tel: 0131 244 0943

[www.scotland.gov.uk](http://www.scotland.gov.uk)

#### **Health and Safety Executive**

HSE Infoline

Tel: 08701 545500

or write to:

HSE Information Centre

Caerphilly Business Park

Caerphilly CF83 3GG

[www.hse.gov.uk](http://www.hse.gov.uk)

#### **Department for Transport**

Great Minster House

76 Marsham Street

London SW1P 4DR

Tel: 020 7944 8300

[www.dft.gov.uk](http://www.dft.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](http://www.ind.homeoffice.gov.uk)

#### **The Foreign and 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](http://www.fco.gov.uk)

#### **The Equality and Human Rights Commission**

The Optima Building, 58 Robertson Street,  
Glasgow, G2 8DU

Telephone 0141 228 5910

Fax 0141 248 5912

[www.equalityhumanrights.com](http://www.equalityhumanrights.com)

## **National Governing Bodies and Similar Bodies**

### **Association of British Riding Schools**

Queens Chambers  
38-40 Queen Street  
Penzance  
Cornwall TR18 4BH  
Tel: 01736 369 440  
[www.abrs.org](http://www.abrs.org)

### **Association for Outdoor Learning**

12 St Andrew's Churchyard  
Penrith  
Cumbria  
CA11 7YE  
Tel: 01768 891065  
[www.outdoor-learning.org](http://www.outdoor-learning.org)

### **The British Horse Society**

Stoneleigh Deer Park  
Kenilworth  
Warwickshire CV8 2XZ  
Tel: 08701 202244  
[www.bhs.org.uk](http://www.bhs.org.uk)

### **British Mountaineering Council**

177-179 Burton Road  
Manchester M20 2BB  
Tel: 0161 445 4878  
[www.thebmc.co.uk](http://www.thebmc.co.uk)

### **The Mountaineering Council of Scotland**

The Old Granary  
West Hill Street  
Perth  
PH1 5QP  
Tel: 01738 638227  
Fax: 01738 442095  
[www.mountaineering-scotland.org.uk](http://www.mountaineering-scotland.org.uk)

### **Mountain Leader Training Scotland**

National centre  
Glenmore Lodge  
Tel: 01479 861248  
[www.mltuk.org/docs/MLTS.html](http://www.mltuk.org/docs/MLTS.html)

### **British Caving Association**

Ffrancon Annexe  
Thornton in Lonsdale  
Ingleton  
Carnforth  
Lancashire LA6 3PB  
Tel: 01524 241 737  
[www.british-caving.org.uk](http://www.british-caving.org.uk)

### **Royal Yachting Association Scotland**

Caledonia House  
South Gyle  
Edinburgh  
EH12 9DG  
Tel: 0131 317 7388  
[www.ryascotland.org.uk](http://www.ryascotland.org.uk)

### **Scottish Cycling**

The Velodrome  
Meadowbank Sports Centre  
London Road  
Edinburgh  
EH7 6AD  
Tel: 0131 652 0187  
[www.scuonline.org](http://www.scuonline.org)

### **Scottish Canoe Association**

Caledonia House  
South Gyle  
Edinburgh  
EH12 9DQ  
Tel: 0131 317 7314  
[www.canoescotland.com](http://www.canoescotland.com)

### **Scottish Equestrian Association**

Grange Cottage  
Station Road  
Langbank  
Renfrewshire  
PA14 6YB  
[www.equinesport.org.uk](http://www.equinesport.org.uk)

### **Scottish Orienteering Association**

Glenmore Lodge  
Aviemore  
Inverness-shire  
PH22 1QU  
Tel: 01479 861713  
[www.scottishorienteering.org](http://www.scottishorienteering.org)

### **Scottish Rafting Association**

The Coachyard  
Aberfeldy  
PH15 2AS  
Tel: 01887 829 292  
[www.scottish-rafting-association.org.uk](http://www.scottish-rafting-association.org.uk)

### **Snowsport Scotland**

Caledonia House  
South Gyle  
Edinburgh  
EH12 9DQ  
Tel: 0131 625 4405  
Fax: 0131 317 7202  
[www.snowsportscotland.org](http://www.snowsportscotland.org)

**Trekking and Riding Society of Scotland**

Bruaich-na-h'abhainne  
Maragowan  
Killin

Perthshire FK21 8TN  
Tel: 01567 820909

[www.ridinginscotland.com](http://www.ridinginscotland.com)

**Others bodies****Adventure Activities Licensing Service  
(AALS)**

17 Lambourne Crescent  
Llanishen  
Cardiff CF4 5GG  
Tel: 029 20755715

[www.aala.org](http://www.aala.org)

**Association of British Travel Agents  
(ABTA)**

68-71 Newman Street  
London W1T 3AH  
Tel: 0207 637 2444

[www.abta.com](http://www.abta.com)

**The Association for Physical Education**

Room 117, Bredon  
University of Worcester  
Henwick Grove  
Worcester, WR2 6AJ

Tel: 01905 855 584

[www.afpe.org.uk](http://www.afpe.org.uk)

**The British Activity Holiday Association  
(BAHA)**

22 Green Lane  
Hersham

Surrey, KT12 5HD.  
Tel/Fax: 01932 252994

[www.baha.org.uk](http://www.baha.org.uk)

**British Schools Exploring Society**

1 Kensington Gore  
London SW7 2AR

Tel: 0207 591 3141

[www.bs-es-expeditions.org.uk](http://www.bs-es-expeditions.org.uk)

**The Duke of Edinburgh's Award  
(Scotland)**

69 Dublin Street  
Edinburgh EH3 6NS

Tel: 0131 556 9097

[www.theaward.org](http://www.theaward.org)

**Field Studies Council**

Montford Bridge  
Preston Montford  
Shrewsbury  
Shropshire, SY4 1HW

Tel: 0845 3454071

[www.field-studies-council.org](http://www.field-studies-council.org)

**Forestry Commission Scotland**

National Office  
Silvan House  
231 Corstorphine Road,  
Edinburgh  
EH12 7AT

Tel: 0131 334 0303

[www.forestry.gov.uk/scotland](http://www.forestry.gov.uk/scotland)

**The Maritime and Coastguard Agency  
(MCA)**

Tutt Head  
Mumbles  
Swansea

Tel: 0870 6006505

[www.mcga.gov.uk](http://www.mcga.gov.uk)

**Medical Advisory Service for Travellers  
Abroad (MASTA)**

Moorfield Road  
Leeds LS19 7BN

Tel: 0113 238 7575

Travellers Health Line: 0906 8224 100

[www.masta.org](http://www.masta.org)

**National Association of Field Studies  
Officers (NAFSO)**

CEES Stibbington Centre  
Church Lane  
Stibbington

Peterborough PE8 6LP

Tel: 01780 782 386

[www.nafso.org.uk](http://www.nafso.org.uk)

**The Outdoor Education Advisory Panel  
(England and Wales)**

[www.oeap.info/](http://www.oeap.info/)

**Royal Highland Educational Trust**

Royal Highland centre  
Ingliston,  
Edinburgh

EH28 8NF

Tel: 0131 335 6227

[www.rhet.org.uk](http://www.rhet.org.uk)

**Royal Life Saving Society UK**

River House  
High Street  
Broom  
Warwickshire B50 4HN  
Tel: 01789 773 994  
[www.lifesavers.org.uk](http://www.lifesavers.org.uk)

**The Royal Society for the Prevention of Accidents (RoSPA)**

Edgbaston Park  
353 Bristol Road  
Birmingham B5 7ST  
Tel: 0121 248 2000  
[www.rosipa.com](http://www.rosipa.com)

**School and Group Travel Association (SAGTA)**

Katepwa House  
Ashfield Park Avenue  
Ross-on-Wye  
Herefordshire HR9 5AX  
Tel: 01989 567 690

**Scottish Activity Holiday Association**

c/o Rua Reidh Lighthouse  
Melvaig  
Gairloch IV21 2EA  
Tel: 01445 771263  
[www.activity-scotland.org.uk](http://www.activity-scotland.org.uk)

**Scottish Advisory Panel for Outdoor Education (SAPOE)**

Abbey House  
8 Seedhill Road  
Paisley  
PA1 1JT  
Tel: 0141 840 3800  
[www.sapoe.ik.org](http://www.sapoe.ik.org)

**Scottish School Board Association (SSBA)**

30 Newall Terrace  
Dumfries  
DG1 1LW  
Tel: 01387 260428  
[www.schoolboard-scotland.com](http://www.schoolboard-scotland.com)

**Sportscotland**

Caledonia House  
South Gyle  
Edinburgh EH12 9DQ  
Tel: 0131 317 7200  
[www.sportscotland.org.uk](http://www.sportscotland.org.uk)

**Sportscotland National Centre**

Glenmore Lodge  
Aviemore  
Inverness-shire  
PH22 1QU  
Tel: 01479 861256  
[www.glenmorelodge.org.uk](http://www.glenmorelodge.org.uk)

**Sportscotland National Centre (Sailing)**

Cumbræ  
Isle of Cumbræ  
Ayrshire  
KA28 0HQ  
Tel: 01475 530757  
[www.nationalcentrecumbræ.org.uk](http://www.nationalcentrecumbræ.org.uk)

**The Waterway Trust Scotland**

New Port Downie,  
Lime Road,  
Tamfourhill,  
Falkirk,  
FK1 4RS  
Telephone 01324 677822  
[www.thewaterwaystrust.co.uk/scotland.shtm](http://www.thewaterwaystrust.co.uk/scotland.shtm)  
[www.wow4water.net/](http://www.wow4water.net/)

**Scottish Youth Hostel Association (SYHA)**

National Office  
7 Glebe Crescent  
Stirling  
FK8 2JA  
Tel: 01786 891400  
[www.syha.org.uk](http://www.syha.org.uk)