



**Policy:**

**School Excursion Policy**

Author:  
Service:  
Last Updated:

Andrew Sneddon  
Education  
October 2014

Education Services

**Contents**

1. Introduction
2. Definition of School Excursion
3. Repeat/Regular Excursions
4. Procedure for Arranging School Excursion
5. School Excursion Planning Checklist
6. Roles and Responsibilities
7. Code of Conduct
8. Risk Assessment
9. First Aid
10. Medical and Other Needs, including Dietary Needs
11. Supervision Ratios
12. Equal Opportunities
13. Child Protection
14. Contingency Planning
15. Emergency Procedures
16. Insurance
17. Transport
18. Financial Arrangements
19. Further Information

**Appendices**

1. EE0 Form Request in School for Approval Form
2. EE1 Authority Excursion Application Form
3. EE2 Parental/Carer Agreement Form
4. Sample Code of Conduct
5. Emergency Action Card

## 1. INTRODUCTION

The Council recognises that excursions out of school enhance the educational experience of pupils. They should have a clear educational purpose and pre-determined educational objectives which underpin the Curriculum for Excellence Framework. These should be shared with parents/carers. It is essential that excursions are properly planned. This policy is designed to provide a framework for excursion leaders to use when planning an excursion. This policy will not apply to excursions organised by parents or the parent council.

*The School Excursion Policy is designed to ensure that risks arising from excursions are minimised, so that the safety and wellbeing of pupils is protected.*

*Our local policy is implemented within the framework of national Scottish Government Guidance. The Scottish Government recognises that while local authorities' guidance and regulations remain authoritative, it is expected that 'Going Out There', the national advice, should be adopted as a common framework across Scotland by all those managing or organising visits or providing activities and venues. A key feature of 'Going Out There' is that it adopts a low bureaucracy, enabling approach to outdoor experience and off-site visits, reflecting the step change in the approach to educational visits detailed in the HSE High Level Statement, ['School trips and outdoor learning activities: Tackling the health and safety myths'](#). The HSE statement makes clear that:*

- *The focus should be on how the real risks arising from such visits are managed rather than a focus on paperwork*
- *There is a need for a proportionate and sensible approach for planning and organising off-site activities*

*In implementing this policy, therefore, it is necessary to adopt a robust approach to planning and organising excursions whilst at the same time ensuring that the approach is proportionate and sensible, and focuses on managing real risk rather than on paperwork.*

## 2. DEFINITION OF SCHOOL EXCURSION

An excursion is any visit that is arranged by teachers and other West Lothian Council staff for pupils. This will include day or evening visits of a curricular nature, day/evening visits of an extra-curricular nature, overnight/residential excursions, outdoor education and foreign excursions, and will include the following examples:

### **Day/evening visits of a curricular nature**

- Any activity or excursion out with the school boundary
- History field excursion
- Biology visit to Botanic Gardens
- Drama visit to theatre
- Visit to Time Capsule
- Visit to a Music Performance
- Excursion to the library
- Excursion to Country Park
- Outdoor education
- Pupils on alternative curriculum undertaking activities out with the school boundary

- Pupils undertaking classes at another school
- Pupils undertaking work experience (covered by Work Experience Policy)

#### **Day/evening visit of an extra-curricular nature**

- An outing to watch a sports event
- An outing to a theme park
- Participating in a sports event
- Participating in a cultural event

#### **Overnight excursions in the UK**

- Weekend excursion to Lagganlia
- Two day visit to London

#### **Foreign excursion**

- Water sports excursion to France
- Skiing excursion to Switzerland
- Battlefield excursion to Belgium
- Exchange visits for Modern Languages

### **3. REPEAT/REGULAR SCHOOL EXCURSIONS**

The policy will apply to all excursions, and this will include repeat and regular excursions.

Repeat and regular excursions will include weekly excursions to the swimming pool, regular visits to the library, regular visits to Howden Park Centre, and pupils on alternative curriculum undertaking activities out with the school boundary.

In the case of repeat and regular excursions, mandatory permissions and advice as set out in Section 4 below, and the mandatory planning checklist set out in Section 5 need only be completed

- on the first occasion the excursion is undertaken;
- when any significant change to the excursion is made; and
- at least annually thereafter.

#### 4. MANDATORY PERMISSION AND ADVICE FOR ARRANGING SCHOOL EXCURSION

This is the **mandatory** procedure to be followed for all school excursions. It is **essential** that each step is followed.

- ***Approval must be sought, as set out below, at the start of planning for excursions before any arrangements are made i.e. collecting deposits.***
- Member of staff organising excursion undertakes initial risk assessments following the instructions in Section 8 of this policy.
- Member of staff organising excursion must seek appropriate **professional advice** (from Team Leader, Sport and Outdoor Education, Low Port Centre) depending on the nature of any activities to be undertaken i.e. sporting activities, activities with risk to participants.
- Member of staff organising excursion must seek **school permission** by completing form EE0 form - Request for Approval of School Excursion and submits it to the Headteacher, or designated member of SMT with responsibility for school excursions, along with supporting documentation including initial risk assessments, and any professional advice sought, for approval.
- Once school approval obtained, member of staff organising excursion must seek **Sport and Outdoor Education permission** by completing form EE1– Request for Approval of School Excursion involving Foreign Travel, Overnight Stay or Outdoor Education where appropriate. Form EE1 is submitted to the Team Leader, Sport and Outdoor Education, Low Port Centre for approval, and any professional advice sought. This should be undertaken at least **four weeks** before the proposed excursion (**eight weeks** for a foreign excursion).
- Once Sport and Outdoor Education approval obtained, member of staff organising excursion must seek **parental/carer permission** by distributing form EE2 – Parental/Carer Agreement to Educational Excursion to all parents/carers.
- Once form EE2 returned from parents/carers member of staff organising excursion must seek **advice on any medical issues/additional support needs/other needs** raised (from Occupational Health/Health and Safety/Additional Support for Learning Team)
- ***If the above permissions and advice have not been obtained an excursion cannot take place. It is the responsibility of the member of staff organising the excursion to leave sufficient time for all steps to be completed, and to liaise with those required to give permission or advice.***

## 5. MANDATORY SCHOOL EXCURSION PLANNING CHECKLIST

Use of the excursion planning checklist by the Excursion Leader, and the undertaking of all steps on the checklist, is **mandatory**

EXCURSION TITLE .....

EXCURSION DATES .....

EXCURSION LEADER .....

INITIAL PREPARATION	DATE	SIGNED
<ul style="list-style-type: none"> <li>Seek permission and advice as set out in Section 4 of the School Excursion Policy</li> </ul>		
<b>DETAILED PREPARATION</b>		
<ul style="list-style-type: none"> <li>Plan staff numbers, roles, responsibilities.</li> </ul>		
<ul style="list-style-type: none"> <li>Plan financial arrangements including cash collection and cash holding.</li> </ul>		
<ul style="list-style-type: none"> <li>Ensure insurance in place.</li> </ul>		
<ul style="list-style-type: none"> <li>Plan first aid provision.</li> </ul>		
<ul style="list-style-type: none"> <li>Consider child protection implications and agree any necessary action.</li> </ul>		
<ul style="list-style-type: none"> <li>Make provisional bookings for transport, equipment, accommodation etc.</li> </ul>		
<ul style="list-style-type: none"> <li>Provide initial information to parents/carers and pupils including, staff involved, total costs, transport arrangements, activities and risks, behaviour/code of conduct. A meeting is recommended for overnight and foreign excursions, and should be considered for other excursions.</li> </ul>		
<ul style="list-style-type: none"> <li>Distribute form EE2 – Parental/Carer Agreement to Educational Excursion to all parents/carers.</li> </ul>		
<ul style="list-style-type: none"> <li>Seek advice from parent on any medical issues/additional support needs raised (from Occupational Health/Health and Safety/ASL Team) and agree any necessary action.</li> </ul>		
<ul style="list-style-type: none"> <li>Ensure that procedures are in place for carriage of medicines of a high risk nature.</li> </ul>		
<ul style="list-style-type: none"> <li>Identify contingency and emergency arrangements, including designated school emergency contact.</li> </ul>		
<ul style="list-style-type: none"> <li>Finalise party composition (staff and pupils).</li> </ul>		
<ul style="list-style-type: none"> <li>Ensure that for any excursion requiring time out of school, pupil names are circulated to staff two weeks prior to the excursion taking place.</li> </ul>		
<ul style="list-style-type: none"> <li>Log excursion on school calendar.</li> </ul>		
<ul style="list-style-type: none"> <li>Discuss class cover implications with member of staff responsible for cover.</li> </ul>		

<b>FINAL PREPARATIONS</b>		
<ul style="list-style-type: none"> <li>• Confirm and record staff roles and responsibilities including supervision. Brief all staff.</li> </ul>		
<ul style="list-style-type: none"> <li>• Confirm and record contingency and emergency contacts/procedures. Brief all staff.</li> </ul>		
<ul style="list-style-type: none"> <li>• Ensure excursion party emergency contact details (i.e. copy of form EE2s), copies of travel documents, insurance documents, medical papers left in folder in prominent place in school office and a copy is given to designated school emergency contact.</li> </ul>		
<ul style="list-style-type: none"> <li>• Confirm travel arrangements.</li> </ul>		
<ul style="list-style-type: none"> <li>• Confirm accommodation.</li> </ul>		
<ul style="list-style-type: none"> <li>• Inform and prepare all participants on all aspects of excursion. Meeting(s) is/are recommended for overnight and foreign excursions, and should be considered for other excursions.</li> </ul>		
<ul style="list-style-type: none"> <li>• Conduct final risk assessment and submit to Headteacher, or designated member of SMT with responsibility for school excursions .</li> </ul>		

<b>AT THE START OF THE EXCURSION</b>		
<ul style="list-style-type: none"> <li>• Check and record presence of all participants and change list if necessary. Ensure school copy is also changed.</li> </ul>		
<ul style="list-style-type: none"> <li>• Remind participants of grouping and supervision arrangements</li> </ul>		
<ul style="list-style-type: none"> <li>• Remind participants of contingency and emergency plans and check understanding</li> </ul>		
<ul style="list-style-type: none"> <li>• Check that pupils have sufficient supplies of any necessary medication with them, e.g. inhaler for asthma</li> </ul>		
<ul style="list-style-type: none"> <li>• Check equipment</li> </ul>		
<ul style="list-style-type: none"> <li>• Check weather forecast and road conditions</li> </ul>		
<ul style="list-style-type: none"> <li>• Take a copy of all EE2s, copies of travel documents, insurance documents, medical papers on excursion</li> </ul>		

<b>AFTER EXCURSION</b>		
<ul style="list-style-type: none"> <li>• Inform school contact/emergency contact of safe return if the excursion is out with the school day</li> </ul>		
<ul style="list-style-type: none"> <li>• Return resources</li> </ul>		
<ul style="list-style-type: none"> <li>• Review the excursion, record and implement any action required on the Debrief Form</li> </ul>		
<ul style="list-style-type: none"> <li>• Submit incident reports if necessary</li> </ul>		

## **6. ROLES AND RESPONSIBILITIES**

### **6.1 The Headteacher (or designated member of SMT with responsibility for school excursions) will:**

- Consider the Request for Approval of School Excursion form EE0 submitted in relation to each proposed excursion.
- Be fully conversant with relevant West Lothian Council policy, guidelines and procedures and take overall responsibility for their application to each excursion.
- In particular, in relation to each excursion, the Headteacher will:-
  - Ensure that the excursion has suitable aims and effective ways of achieving them.
  - Ensure that all staff involved in excursions are fully conversant with relevant West Lothian Council policy, guidelines and procedures.
  - Ensure that all staff involved in excursions are competent and sufficiently experienced. Experience can be demonstrated, for example through participation in an excursion of the type being planned in a role supporting the experienced Excursion Leader.
  - Ensure that roles and responsibilities of all staff involved in excursions are clearly defined, based on the roles and responsibilities set out in this policy (i.e. first aid, administration of medicine).
  - Ensure that proposed excursion or activity is appropriate to pupil abilities.
  - Ensure that permission has been obtained and that parents/carers are informed appropriately of all relevant information including emergency contacts, code of conduct etc.
  - Ensure that appropriate risk assessments have been completed and proportionate safety measures put in place.
  - Ensure that effective child protection procedures are in place.
  - Ensure that insurance arrangements are in line with Council policy and procedure, and that all parents/carers are informed of the insurance arrangements.
  - Ensure that financial arrangements are in line with Council policy and procedure, including that cash collection and cash holding is in accordance with sections 5 and 8 of the Council's cash procedure and that cash holding is minimised and does not exceed the relevant insurance limit.
  - Ensure contingency procedures and procedures in case of emergency are in place.
- Devise an effective system to review and assess excursions.

**The Headteacher will retain ultimate responsibility for all excursions.**

### **6.2 The Excursion Leader will:**

- Be fully conversant with relevant West Lothian Council policy, guidelines and procedures, including child protection.
- Undertake the mandatory steps set out in Section 4 of this policy.
- Undertake all other planning for the excursion as set out in the mandatory check list in Section 5 of this policy.
- Select the staff team for excursion, in particular a deputy leader who will take responsibility in the event of an emergency.

- Delegate responsibilities as appropriate to other members of the team, in line with the roles and responsibilities set out in this policy (i.e. deputy leader, first aid, administration of medicine)
  - Liaise with parents/carers and ensure that parents/carers have received all relevant information regarding the excursion be provided with all relevant information regarding the excursion including the learning objectives of the excursion, the venue and activities, insurance arrangements, transport arrangements, first aid arrangements, emergency arrangements and any periods of 'free time' when pupils will have reduced or no direct supervision.
  - Hold a parent/carers meeting for overnight or foreign excursions.
  - Inform and prepare pupils for excursion.
  - Ensure the health and safety of the participants, and the maintenance of order and discipline.
  - Provide the Code of Conduct.
- **The Excursion Leader will take responsibility during the excursion.**

### **6.3 Members of Staff Accompanying the Excursion**

#### **Staff accompanying the excursion will:**

- Take specific responsibility for an aspect of the excursion, in line with the roles and responsibilities set out in this policy (i.e. deputy leader, first aid, administration of medicine) as delegated by the Excursion Leader.
- Assist in ensuring the health and safety of the participants, and the maintenance of order and discipline.

### **6.4 Parents/Carers Responsibilities**

#### **Parents/carers will:**

- Complete form EE2 – Parental/Carer Agreement to Educational Excursion for **all** excursions falling within the definition in this policy
- Acknowledge receipt of information supplied and agree or otherwise to their child's participation
- Confirm relevant aspects of ability and fitness of their child, and any particular medical or other needs
- Provide all information requested by the Excursion Leader in order to ensure the well-being of their child
- Consent to essential medical treatment
- Acknowledge and agree expected behaviour of their child during the excursion, including the Code of Conduct where appropriate
- Confirm contact telephone number(s) for the period of the excursion

### **6.5 Participants Responsibilities**

#### **In agreement with parents/carers and the Excursion Leader, participants will:**

- Not take unnecessary risks



- Follow the instructions of the Excursion Leader, other staff, and staff at the venues visited
- Dress appropriately
- Behave in accordance with normal school rules and discipline or code of conduct where appropriate

## **7. CODE OF CONDUCT**

The excursion leader must establish expectations of behaviour in advance for both pupils and parents/carers.

For day/evening excursions pupils and parents/cares should be informed that:

- normal school rules and disciplinary sanctions apply and that a high standard of behaviour is expected.
- pupils must follow the instructions of the excursion leader and other supervisors including those at the venue of the excursion
- pupils must dress appropriately

A written code of conduct must be put in place for overnight and foreign excursions. The excursion leader must make it clear to participants that they must accept the code of conduct as established in advance of the excursion. Parents/carers will be informed that they are expected to reinforce the excursion's code of conduct with their child.

Parents/carers should be asked to agree the arrangements for sending a participant home and if necessary, who should meet the cost.

A sample code of conduct is included as appendix 4.

## 8. RISK ASSESSMENT

The Council is responsible for the health safety and welfare at work of its employees, and has a duty to ensure, as far as is reasonably practicable, the health and safety of others. This includes all participants in school excursions.

At least two risk assessments must be carried out for all excursions, one at the initial planning stage to inform the detailed planning of the excursion, and one at the end of the detailed planning process. The purpose of these risk assessments is to ensure that all significant risks have been identified and control measures implemented.

Risk assessment should include the following considerations:

- What are the hazards (including during travel)?
- Who might be affected by them?
- Are staff competent and sufficiently experienced to lead the excursion, taking account of the nature of the excursion and the hazards identified?
- What supervision ratio is appropriate to the excursion and the participants?
- What safety measures need to be taken to reduce the risk?
- Can the group leader ensure that the safety measures in place are adhered to?
- What steps will be taken in an emergency?
- What steps can be taken to ensure Child Protection?

Many venues will have conducted their own risk assessments which can be made available to visiting schools. These may be incorporated into, or used as the basis for, the excursion leader's risk assessment, but will not remove the necessity of conducting risk assessments, and the responsibility for conducting risk assessments, as set out in this section. The Excursion Leader should consider the qualification of the person conducting the venue's risk assessment, if known, and how recently it was carried out.

Completed risk assessments must be submitted to Headteacher, or designated member of SMT with responsibility for school excursions, for retention. A copy of completed risk assessments must accompany form EE1.

Training in carrying out risk assessments is available through the CPD directory.

Examples of risk assessment forms, and further guidance are accessible in Edweb (see Section 18).

## **9. FIRST AID**

First Aid must form part of the risk assessment for the excursion. The excursion leader must assess what level of First Aid might be needed. This must take into account the medical needs of pupils participating in the excursion as declared on the Form EE2 or otherwise disclosed to the school. Provision must be made to cater for the particular needs of pupils participating in the excursion, for example administration of epi-pen.

The Excursion Leader must have ready access to a suitably stocked First Aid kit. One member of staff accompanying the excursion must be designated as responsible for first aid. All adults on the excursion should know how to contact the emergency services.

For overnight and foreign excursions it is essential that at least one member of staff accompanying the excursion holds a current first aid certificate.

For day/evening excursions the risk must be assessed. Factors to consider will include the individual medical needs of participants, the length of time the excursion will last, whether the excursion will take place in an area remote from emergency assistance.

## **10. MEDICAL AND OTHER NEEDS, INCLUDING DIETARY NEEDS**

The Excursion Leader must hold written information detailing participant's medication and other needs, including dietary needs, and must put in place arrangements to ensure that these needs can be met.

All adults accompanying the excursion should be aware of participant's medical and other needs, including dietary needs. A member of staff accompanying the excursion should be identified as having responsibility to support and administer medication if required to do so, in line with the Council's Guidance on the Management of Medication, Medical Assistance and Therapy Intervention in Educational Provision.

Training may be required to be put in place for the member of staff to fulfil this role. It may be appropriate to ask a parent/carer or a support worker to accompany a pupil in order to ensure their well-being.

The following information will be required from all parents/carers:

- details of medical condition
- dietary requirements
- emergency contact numbers
- GP's or appropriate medical practitioner's name, address and phone number
- written details of medication and how it should be administered
- parental/carer permission if the participant needs to administer their own medication or agreement for a member of staff accompanying the excursion to do this.
- advice/information to assist with the preparation of an emergency plan

## 11. SUPERVISION

It is important to have a suitable ratio of staff to participants for all excursions. Parent/carer helpers can be included for the purposes of calculating ratios.

The following ratios are recommended:

- 1 adult to 15 participants for excursions where the element of risk to be encountered is similar to that normally encountered in daily life, e.g. excursions to sites of historic interest, most field work, local walks etc.
- 1 adult to 10 participants for all excursions abroad, with a minimum of two adults, with an appropriate gender mix to be considered.
- 1 adult to 15 participants for all residential excursions, with a minimum of 2 adults, with an appropriate gender mix to be considered.
- 1 adult to 6 (or fewer) participants for children under the age of 8 and pupils with additional support needs, with a minimum of two adults.
- For pre-school aged children, the appropriate supervision ratio may be as high as 1 adult to 2 children. Particular care should be taken when determining the appropriate level of supervision for pre-school aged children.

The Excursion Leader must consider the number of staff necessary for supervision in the planning stages. Supervision requirements should be considered as part of the initial and final risk assessment. Any departure from the recommendations above must be supported by a risk assessment which records the reasons for the decision.

The factors to take into consideration include:-

- sex, age and ability of group
- those with additional support or medical needs
- nature of activities
- experience of adults in off-site supervision
- duration and nature of the journey
- type of any accommodation
- competence of staff on specific activities
- requirements of the organisation/location to be visited
- anticipated behaviour of participants
- First Aid requirements

Residential excursions to Low Port Centre may be considered as an exception from the above recommendation, on the basis that its location in West Lothian would allow the attendance of school staff in an emergency, for example to escort a child home. In considering supervision levels at Low Port Centre, the Excursion Leader should also take account of its status as a Council run establishment, and the status of its staff as Council employees.

For higher risk activities, consideration will need to be given to greater adult supervision, as appropriate, for example 1-6 on river activities, 1-3 in dinghy sailing etc. In the case of higher risk activities, the advice of the Team Leader, Sport and Outdoor Education should be sought.

For higher risk activities, and activities where certain qualifications are required, the Team Leader, Sport and Outdoor Education should be consulted. Remember to check that the qualifications of those providing the activity are up-to-date, relevant and specific to the activity.

The Excursion Leader, prior to departure, should give consideration through the risk assessment process to the composition of groups where appropriate and allocate staff in relation to group activities.

Staff assisting with the excursion should only be left in sole charge of participants where this had been previously agreed as part of a risk assessment.

For overnight and foreign excursions the Excursion Leader must put in place appropriate sleeping arrangements and ensure adequate and appropriate staff supervision of pupils during the night.

Working without immediate supervision can help learners develop independence and self reliance. It is not envisaged that all activities out with the school boundary will be subject to direct supervision, including pupils attending classes at other schools or colleges, or undertaking work experience. In such cases, the age and capacity of the child or young person must be considered and explicit parental agreement obtained. Pupils must be fully briefed with regard to what to do in the event of delays, missed transport, incidents or accidents.

## **12. EQUAL OPPORTUNITIES**

Equalities legislation makes it unlawful to discriminate without justification against pupils in all aspects of school life including school excursions. All pupils should be able to participate in excursions and activities, irrespective of additional support, medical needs, ethnic origin, gender, religion and belief and economic circumstance. All young people should be encouraged to participate in as wide a range of activities as possible.

Legislation makes it unlawful for a disabled pupil to be less favourably treated, or put at a substantial disadvantage, for a reason related to their disability in comparison to their non- disabled peers without justification. Pupils with a disability or additional support needs must be given the opportunity to participate in excursions. Special attention should be given to appropriate ratios and additional safety measures should be considered at the planning stage. Where a pupil cannot participate in a particular activity as a result of a disability or an additional support need, an alternative activity of equal educational value, should be provided.

## **13. CHILD PROTECTION**

All members of staff involved in excursions must be trained in Child Protection and be able to follow the correct procedures. The Excursion Leader will take the role of Designated Member of staff for Child Protection and will follow the Edinburgh and Lothian's Child Protection Procedures.

Child Protection should be considered during all risk assessments conducted in relation to the excursion, and appropriate steps put in place to minimise risks.

For foreign excursions, the Excursion Leader must refer to the Guidelines for The Protection of Young People in the Context of International Visits. This is available on the Scottish Government website.

## **14. CONTINGENCY PLANNING**

The Excursion Leader is responsible for contingency planning. Plans may have to be changed without notice for a variety of reasons. The Excursion Leader should consider potential circumstances where plans may need to be changed, and a potential response, in relation to each individual excursion.

The Excursion Leader and other staff accompanying the excursion should monitor risk throughout the excursion and take appropriate action as necessary.

Regular head counting of participants should take place. The Excursion Leader must establish rendezvous points and tell participants what to do if they become separated from the group.

The following guidance must be considered in relation to each excursion:

- The Excursion Leader and staff accompanying the excursion should have mobile phones so that immediate contact can be maintained where possible. Additional planning is necessary in the case of remote areas where reception may not be possible.
- In the case of foreign excursions the Excursion Leader and staff accompanying the excursion must ensure that their mobile phones will operate in all countries to be visited.
- Participants and their parents/carers must be made aware that last minute changes may be necessary and that they must follow the instructions of the Excursion Leader and staff accompanying the excursion in such circumstances.
- the Excursion Leader is responsible for making the decision to make changes
- the Excursion Leader will consider the safety of participants when making any changes
- the Excursion Leader must carry "Immediate Action" cards setting out the emergency action outlined in Section 15 below in response to Category 1-3 emergencies.
- The Excursion Leader and staff accompanying the excursion should know how and where to contact appropriate help, e.g. if abroad knowledge of how to use local telephone system, knowledge of relevant local numbers and appropriate coins or cards for public telephone use.
- In the case of outdoor pursuits, e.g. hill walking, sailing, canoeing, the Excursion Leader and staff accompanying the excursion should know how to call on the assistance of local rescue services.
- Where appropriate, official rescue services should be given details of proposed activities e.g. for coastal sailing and canoeing contact HM Coastguard.

## **15. EMERGENCY PROCEDURES**

Excursion Leaders and staff accompanying the excursion have a common law duty to act as a reasonably prudent parent would. They should not hesitate to act in an emergency and to take life-saving action in an extreme situation.

The Excursion Leader must consider contingency plans and plan for emergencies. Emergencies range from what is categorised as minor (Category 1) to very serious (Category 3).

In the event of an emergency the Excursion Leader will take the principal role. The Excursion Leader will assess the situation, delegate and take appropriate action. Contingency planning should identify another member of staff who will take over if the excursion leader is incapacitated.

Examples include:

<p>Category 1</p>	<p>The coach breaks down en-route or on return</p> <p>Road works cause delay</p> <p>Bad weather causes delay</p>	<p>The Excursion Leader will implement contingency plans, and inform school/parents/carers of any changes in pick-up time etc as required.</p>
<p>Category 2</p>	<p>A pupil is injured (non life threatening) and needs medical attention. e.g. broken ankle, bad cut.</p> <p>A pupil becomes ill. e.g. appendicitis</p>	<p>The designated member of staff will provide appropriate First Aid/Emergency Aid.</p> <p>The Excursion Leader will seek appropriate medical assistance e.g. ambulance/doctor ensuring any medical or other relevant information relating to the injured pupil is passed on.</p> <p>The Excursion Leader will ensure the remainder of the group are not at risk and are appropriately supervised.</p> <p>The Excursion Leader must inform the school contact of the situation, and provide updates. The school contact will take responsibility for informing parents/carers.</p> <p>:</p> <p>The Excursion Leader will record in writing circumstances surrounding the incident at the first opportunity, and preserve any evidence.</p> <p><i>In the event of an accident taking place, the excursion leader should relate the facts about child's conditions and whereabouts and give a brief outline of what has happened. The leader should not admit liability but give the parents/carers the assurance that a full investigation will take place where appropriate.</i></p> <p><i>The excursion leader must refer all media representatives to West Lothian Council (01506 280000) and must not make any comment to the media.</i></p>

<p>Category 3</p>	<p>A pupil or member of staff is seriously injured (life threatening)</p> <p>A pupil or member of staff is killed</p> <p>A coach or car crashes killing or injuring several of the party</p> <p>A pupil or member of staff goes missing</p>	<p>The Excursion Leader, or other member of staff, will inform the emergency services as appropriate, ensuring any medical or other relevant information relating to the pupil is passed on, and act on their advice.</p> <p>The designated member of staff will provide appropriate First Aid/Emergency Aid while waiting for the emergency services to arrive.</p> <p>The Excursion Leader will ensure the remainder of the group are not at risk and are appropriately supervised.</p> <p>The Excursion Leader will inform a member of School SMT as soon as possible, using the agreed emergency contact arrangements, and act on their advice particularly on contact with emergency services.</p> <p>The Excursion Leader will record in writing circumstances surrounding the incident at the first opportunity, and preserve any evidence.</p> <p>Where practical, the Excursion Leader will ensure contact with parents/carers is through the school, and will not permit pupils to use mobile phones</p> <p>The school will inform a member of the Education SMT as soon as possible. The Education SMT will implement corporate emergency procedures including informing Corporate Communications.</p> <p><i>In the event of an accident or serious incident taking place, the excursion leader should not admit liability but should co-operate fully with the emergency services.</i></p> <p><i>The excursion leader must refer all media representatives to West Lothian Council (01506 280000 and must not make any comment to the media.</i></p>
-------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Following any serious incident a review of the incident and how it happened must be conducted. The corporate Health and Safety Unit must be informed. In accordance with section B.4 of the council's Financial Regulations, the Financial Management Unit must be informed of any loss, liability or damage or any event likely to lead to an insurance claim. Any lessons learned will be incorporated into policy and risk assessments.



## 16. INSURANCE

The Excursion Leader must ensure that appropriate insurance arrangements are in place prior to the excursion taking place.

- Travel Insurance should be taken out for any excursion in excess of 24hrs or where there is a significant cost element to the excursion. i.e. Residential camps, foreign travel etc.  
The Council has School Journey Insurance available, to obtain a quotation contact the Financial Management Unit.
- Prior to attending any externally operated facility the Excursion Leader should check and confirm that the service provider has appropriate insurance in place.  
i.e. The transportation provider has Motor & Public Liability insurance and the establishment you are visiting has Public Liability insurance in place.

Should staff be unsure or require advice the Financial Management Unit can provide schools with further guidance on insurance arrangements.

## 17. TRANSPORT

The Excursion Leader must give careful thought to planning transport. This should include:-

- Mode of transport i.e. reputable transport provider, transport provided as part of a package, use of public transport, use of Council minibus.
- Contingency funds and arrangements in case of travel disruption.
- Level of supervision on transport. A member of staff driving a Council minibus should not normally be responsible for supervision, although this may be appropriate dependant on the number and age of the participants, and the length of the journey. If under consideration, this should be covered by a risk assessment.

Coaches and buses should be hired from a reputable company, in accordance with Council procurement procedures. Compliance with legal requirements is the responsibility of the transport company, not the hirer.

If using a Council minibus, the Excursion Leader must ensure that drivers have the correct entitlements on their licence, and must follow the Transport – Use of Minibuses Policy.

Parents/carers can provide transport for pupils. Such parents/carers should undergo the same level of checks as a parent/carer helper. Such parents/carers must ensure that they have appropriate insurance cover in place. All other parents/carers should be made aware that transport would be provided by another parent/carer, and should provide written consent to this. The Excursion leader must ensure that any such arrangement is covered by a risk assessment. Parents/carers should also be encouraged to consider the risk of any such arrangement.

## **18. FINANCIAL ARRANGEMENTS**

All financial arrangements, including cash collection and handling, must be in accordance with:

- the Council's Financial Regulations;
- sections 5 and 8 of the Council's cash procedure i.e. cash holding must be minimised and must not exceed the relevant insurance limit;
- Education School Fund Account Procedures (section B.7) in relation to contributions received from students; all material contributions must be properly receipted and accurate records of income and expenditure, maintained;

## **19. FURTHER ADVICE**

Further advice is available from:-

Corporate Health and Safety Unit  
Occupational Health  
Additional Support for Learning Team  
Child Protection Officer  
Team Leader, Outdoor Education, Low Port Centre for advice on excursions involving outdoor education or hazardous activities, residential visits and visits abroad  
Financial Management Unit (including in relation to insurance queries)  
Audit and Risk Management Unit

## **20. AUDIT**

For audit purposes, the following documentation should be retained for a period of three months following the excursion, or the last of a series of repeat excursions:-

- Mandatory Checklist
- EE0 Form (where required)
- EE1 Form (where required)
- EE2 Forms
- Final Risk Assessment

## 21. ADDITIONAL INFORMATION

Going Out There – Scottish Framework for Safe Practice in Off-site Visits (including guidance on excursions involving outdoor education or hazardous activities, residential visits and visits abroad) (available on Edweb)

Zurich Insurance Risk Assessment (available on Edweb)

[http://edweb.westlothian.org.uk/educationschooltrip/section4/4\\_0\\_01.htm](http://edweb.westlothian.org.uk/educationschooltrip/section4/4_0_01.htm)

West Lothian Council Health and Safety Guidance (available on My Toolkit)

<http://www.westlothian.gov.uk/article/2197/Health-and-Safety>

Zurich Municipal School Journey Insurance

Transport – Use of Minibuses Policy (available on Edweb)

Guidance on the Management of Medication, Medical Assistance and Therapy Intervention in Educational provision (available on Edweb)

Edinburgh and Lothian's Child Protection Procedures (available on Edweb)

Farm Visits Policy (available on Edweb)

Work Experience Policy (available on Edweb)

The Travel and International Health (T&IH) team at Health Protection Scotland has recently compiled Travel Health Guidance for Schools <http://www.fitfortravel.nhs.uk/news/newsdetail.aspx?id=18963> . Primarily aimed at those planning school excursions abroad, it provides practical advice on health considerations for those going on an overseas excursion.

**FORM EE0 - REQUEST FOR APPROVAL FOR SCHOOL EXCURSION**

<b>INITIAL PROPOSAL</b>	
<b>1. Purpose of Proposed Visit &amp; Objectives (including Risk Assessment Form)</b>	
<b>2. Places to be Visited</b>	
<b>3. Dates and times</b>	
<b>4. Excursion Leader</b>	
<b>5. Staff Participating</b>	
<b>6. Numbers Participating</b>	<ul style="list-style-type: none"> <li>• Pupils</li> <li>• Males/females -----</li> <li>• Age Range -----</li> </ul>
<b>7. Education Service to be contacted (EE1)</b>	<p>Yes/No</p> <p>If Yes has contact been made</p>
<b>8. Estimated cost per student</b>	
<b>9. Name of emergency trained person</b>	
<b>10. Transport required</b>	
<b>11. Signature</b>	<b>Date</b>
<b>12. Designation</b>	
<b>APPROVAL BY SMT</b>	
	<b>Signed .....</b> <b>Date.....</b>

<b>FUNDING</b>	
<b>Total Cost of Excursion (Including entrance &amp; transport)</b>	
<b>Funding from other sources</b>	
<b>Cost per student</b>	
<b>Funding Requested from School</b>	
<b>Approval by SMT</b>	
<b>Funding Granted from School</b>	<b>Signed..... Date.....</b>

<b>BUS BOOKING (where appropriate)</b>	Please pass the form to office staff to allow bus booking to be made. Form will be returned asap
<b>1. Bus Company</b>	
<b>2. Date Booked/cost</b>	
<b>3. Signed (School Office)</b>	.....Date.....

REQUEST FOR FINAL APPROVAL	
<b>1. EE1 accepted (if appropriate)</b>	
<b>2. Parents/carers notified of activity</b>	Yes/No
<b>3. Parental/Carer Consent (EE2) received from all attending (Copy of forms to be left in main office and with out of hours emergency contact)</b>	Yes/No
<b>4. List of participants to office for entry onto register</b>	Yes/No
<b>5. Risk Assessment completed for excursion</b>	Yes/No
<b>6. Insurance Arrangements in place</b>	Yes/No
<b>7. Contact Number for Excursion Leader</b>	Yes/No
<b>8. Copy to Business Manager or HT for class cover</b>	Yes/No

The Excursion must not proceed until all permissions required by the School Excursion Policy have been obtained.

I am satisfied that every effort has been made to meet the requirements of 'West Lothian Policy on School Excursions'.

Signature of Excursion Leader .....

Date .....

Excursion/Activity 

Approved:	Yes/No
-----------	--------

Headteacher (or designated member of SMT with responsibility for school excursions)

.....

Date .....

## EE1– Request for Approval of School Excursion involving Foreign Travel, Overnight Stay or Outdoor Education

To be submitted to the **Sport and Outdoor Education Manager** at the start of the planning process and least **four weeks** before the proposed excursion (**eight weeks** for a foreign excursion).

### SECTION 1

<b>Establishment Name</b>	
<b>Head of Establishment Name</b>	
<b>Full Address</b>	

### SECTION 2 – TO BE COMPLETED BY ALL APPLICANTS

<b>Brief Description of Purpose of Excursion</b>	
<b>Type and Address of Accommodation (where appropriate)</b>	
<b>Date and Estimated Time of Departure</b>	
<b>Date and Estimated Time of Return</b>	
<b>Places to be Visited</b>	
<b>Total Number of Participants</b>	
<b>Number of Male Participants</b>	
<b>Number of Female Participants</b>	
<b>Age Range</b>	
<b>Class(es) (where appropriate)</b>	
<b>Excursion Leader</b>	
<b>Members of Staff Accompanying the Excursion</b>	
<b>Emergency Aid/First Aid qualifications held</b>	
<b>Form of Transport (i.e.</b>	

hired/self drive and type of vehicle)	
---------------------------------------	--

**SECTION 3 – TO BE COMPLETED FOR FOREIGN TRAVEL**

Details of Insurance Arrangements	
-----------------------------------	--

**SECTION 4 – TO BE COMPLETED FOR OUTDOOR EDUCATION**

Details of Activities (i.e. climbing, skiing, hill-walking, canoeing)	
Names and qualifications of instructors (except where activity is being provided by Low Port Centre)	
Level of Activity Planned	
Precise Location of Activity	
Previous Experience of Participants	

**SECTION 5 – ANY OTHER RELEVANT INFORMATION**

--

**SECTION 6 – APPROVAL OF HEAD OF ESTABLISHMENT**

I certify that I am Head of Establishment as detailed in Section 1 and that the details that I have given on this application are correct.

Signed (Head of Establishment)	
Date	

Additional information (i.e. copies of risk assessments, professional advice) sent - Yes/No (delete as appropriate)

**SECTION 7 – APPROVAL OF SPORT AND OUTDOOR EDUCATION TEAM LEADER**

Signed (Sport and Outdoor Education Manager)	
Date	
Excursion Approved	Excursion Not Approved
Additional Letter	Yes/No (delete as appropriate)



## FORM EE2 – PARENTAL/CARER AGREEMENT TO SCHOOL EXCURSION

**SECTION A – To be retained by Parent/Carer**

**1. Dates and estimated times of:**

**a. Departure** ..... **b) Return** .....

**2. Destination/Description of Excursion** .....  
.....

**3. Cost of Excursion (where applicable)** .....

**4. Member of Staff responsible for Excursion** .....

**5. Tel No - School Hours -** ..... **Other -** .....



--

**SECTION B – To be returned to school**

**Excursion to** ..... **Date**.....

**Surname**..... **Forename**..... **Class**.....

**Address**.....  
.....

**Contact Telephone Number – School Hours** .....

**Other Times** .....

**Emergency Contact** .....

**Relevant Medical Details (e.g. asthma)** .....

.....

.....

**I agree to my son/daughter taking part in the above named excursion**

**Signature of Parent/Carer**..... **Date**.....

**NOTE** : Section C is to be completed **only** for excursions that involve either an **overnight stay** or **outdoor education**

**SECTION D MUST BE COMPLETED FOR ALL EXCURSIONS**

SECTION C Please circle as applicable

- 1. Does your child suffer from any allergies? YES NO
- 2. Is your child taking any medication at present? YES NO
- 3. Does your child suffer from any condition that may affect participation? YES NO
- 4. Has your child been in contact with any contagious or infectious disease or suffered from anything in the past four weeks that may become Infectious or contagious? YES NO
- 5. When did your last have a tetanus injection? Date.....
- 6. Does your child have any special dietary requirements? YES NO
- 7. Is there any activity in which your child must not participate? YES NO

**IF YOU HAVE ANSWERED YES TO ANY OF THE QUESTIONS ABOVE PLEASE GIVE DETAILS HERE:**

.....  
.....  
.....

**SECTION D PARENTAL/CARER AGREEMENT TO RECEIVING EMERGENCY MEDICAL TREATMENT**

Pupil Date of Birth.....

Name, telephone number and address of Family Doctor .....

.....

**\*I agree to my child receiving emergency medical treatment, including blood transfusion, and anaesthetic as considered necessary by the medical authorities present.**

**\*I agree to my child receiving medical treatment/anaesthetic as considered necessary by the medical authorities present with the exception of the administration of blood or blood products. I accept full legal responsibility for this decision and release West Lothian Council and its staff from any liability for any consequences resulting from my decision not to consent to the transfusion of blood or blood products.**

*(\*please delete as appropriate)*

Date..... Signed by Parent/Carer .....

## SAMPLE CODE OF CONDUCT

### Pupil's Code of Conduct

Your health, safety and welfare on this visit are of paramount importance to the school. In line with West Lothian policy, to ensure that the above aims are met, each participant and their parent/carer must sign the following "Code of Conduct".

- normal school rules apply – a high standard of behaviour is expected
- rules at the camps must be observed at all times
- be punctual at all meeting times
- always wear a seatbelt on the coach
- if mobile phones are to be carried, ..... must be informed. In certain circumstances use of the phones may be prohibited.
- no pupil should ever be on their own
- purchase, carrying or consumption of alcohol, tobacco or illegal substances is strictly forbidden
- only pupils assigned to particular rooms/tents are allowed in them

### Code of Conduct – Parental Responsibility

**If there is any significant violation of the Code, the group leaders reserve the right to send the offending pupil home at the parent/carers' expense**

---

We have read the Code of Conduct and agree by it at all times.

Signed ..... (pupil)

Signed ..... (parent/carer)

Date .....

Return to .....

**SAMPLE EMEREGENCY ACTION CARD**

<p><b>Party Leader</b>  <b>Ensure this card is available at all times</b></p>	<p><b>Warnings and advice</b></p>
<p><b>School Contact Person/s:</b></p> <p><b>School Contact Telephone Number(s)</b></p> <p><b>Authority      Emergency      Telephone</b>  <b>Number:-</b></p> <p><b>Out of Hours Emergency Telephone</b>  <b>Number:</b></p> <p><b>Calls from abroad:</b></p>	<ul style="list-style-type: none"> <li>• <b>Co-operate fully with emergency services</b></li> <li>• <b>Do not admit liability</b></li> <li>• <b>Do not make comment to the media – refer to West Lothian Council (01506 280000)</b></li> <li>• <b>Keep a written record of all facts</b></li> <li>• <b>Preserve vital evidence - photos might be helpful</b></li> <li>• <b>Inform school emergency contact who will ensure school SMT and Education Services SMT are aware of the situation</b></li> <li>• <b>Seek and follow advice from school/education SMT</b></li> <li>• <b>Do not contact parent/carersss – school contact will take charge of this.</b></li> </ul>

**SAMPLE DEBRIEF FORM**

EXCURSION TITLE .....

EXCURSION DATES .....

EXCURSION LEADER .....

	<b>Action to Take</b>	<b>Date Actioned</b>	<b>Signed</b>
<b>Points to follow up with parents</b>			
<b>Points to follow up with pupils</b>			
<b>Points to follow up with staff</b>			
<b>Lessons for future excursions</b>			

	<b>Action to Take</b>	<b>Date Actioned</b>	<b>Signed</b>
<b>Issues to report to School SMT</b>			
<b>Issues to report to Education SMT</b>			
<b>Other issues to report (i.e. health and safety, child protection)</b>			