

# **Educational Excursions Policy & Procedure**

**Policy and  
Procedure: Educational Excursions**

Author:	Andrew Sneddon
Service	Education Services
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# Educational Excursions Policy & Procedure

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## 1. INTRODUCTION

The Council recognises that excursions out of school enhance pupils' educational experience. Excursions should have a clear educational purpose and pre-determined educational objectives which underpin the Curriculum for Excellence framework and these should be shared with parents.

It is essential that excursions are properly planned and this policy is designed to provide a framework for Excursion Leaders to use when planning an excursion. This policy **does not** apply to excursions organised outwith Education Services e.g. by parents or the parent council.

The Excursion Policy is designed to ensure that risks arising from excursions are minimised, so that the safety and wellbeing of pupils is protected and 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 Scottish framework for safe practice in off-site visits, should be adopted nationally by all those managing or organising visits or providing activities and venues.

*Going Out There* has been developed in partnership by the Scottish Government, the Health and Safety Executive (HSE), the Scottish Advisory Panel for Outdoor Education (SAPOE), Education Scotland and the Association of Directors of Education, with input from other partners including voluntary organisations and providers.

This policy reflects the guidance within *Going Out There* version 2.0, published January 2016.

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 while, 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 AN EDUCATIONAL EXCURSION

An excursion is any visit that is arranged by teachers and other West Lothian Council staff for pupils. This policy guidance is directed mainly towards staff in schools, active schools co-ordinators, instrumental music staff and those leading community learning and development groups.

The guidance will also be of use to and can be interpreted to meet the needs of social services staff, countryside rangers and other staff across the council who may be involved in organising or leading educational excursions. These will include day/evening visits of a curricular nature, day/evening visits of an extra-curricular nature, overnight/residential excursions, adventurous activities and foreign excursions. Please note that pupils undertaking work experience are covered in the Work Experience policy.

## Examples

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

- Drama excursion to theatre, library, etc.
- Pupils on alternative curriculum undertaking activities outwith the school boundary.
- Pupils undertaking classes at another school.

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

- An outing to watch a sports event.
- An outing to a theme park.
- Participating in a sport, adventurous activities or Duke of Edinburgh (DofE) event.

### **Overnight/residential excursions in the UK**

- Weekend excursion to an adventurous activities centre.
- Two day excursion to London.

### **Foreign excursion**

- Skiing excursion to Switzerland.
- Battlefield excursion to Belgium.
- Exchange visits for Modern Languages.

## **3. GLOSSARY OF TERMS**

Evolve	An online system for planning, approving and managing educational excursions.
Excursion	The term <i>excursion</i> is used to mean all activities which take place outwith all West Lothian Council establishments.
Base	The term <i>base</i> is used to mean school, youth centre or any other establishment from which an off-site excursion is organised.
Excursion Leader	The term <i>Excursion Leader</i> is used to mean the member of staff with responsibility for organising the excursion.
Educational Visit Co-ordinator (EVC)	The term <i>EVC</i> is used to mean the person in school with overall responsibility for organizing the excursion.
Head Teacher	The term <i>Head Teacher</i> is used to mean the head of an establishment, or designated member of school Senior Management Team with responsibility for authorizing school excursions or service manager.
Parent	The term <i>parent</i> is used to mean parent(s), carer(s) or guardian(s).
Sphera (previously known as RIVO)	The online Health and Safety system used for the recording and investigation of incidents.

## **4. REPEAT / REGULAR EDUCATIONAL EXCURSIONS**

The policy will apply to all excursions including repeat and regular excursions. Repeat and regular excursions will include weekly excursions to the swimming pool, regular visits to the library, park, woodland, leisure or cultural centre and pupils on alternative curriculum undertaking activities out with the school boundary.

In the case of repeat and regular excursions, 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.

## 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 6 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>		
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<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 Head Teacher 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. PROCEDURE FOR ARRANGING EXCURSIONS

From **August 2019**, the excursion approval process will be facilitated through the EVOLVE Excursion Management System which replaces the old paper-based/e-mail system. EVOLVE is an online tool for planning and managing educational excursions. It is currently used by over 24,000 schools across the UK and assists schools and Local Authorities improve and simplify the process of planning, approving,

monitoring, evaluating and reporting all learning which takes place outside of the classroom.

Initial approval for any school excursions must be sought at school level at the start of the planning process before any arrangements are made e.g., making bookings, collecting deposits, etc. If school approval has not been obtained, an excursion cannot take place. It is the responsibility of the Excursion Leader to leave sufficient time for all steps to be completed and to liaise with those required to give permission or advice.

Excursion Leaders organising an excursion must seek appropriate professional **advice and guidance** from designated council officers depending on the nature of any activities to be undertaken i.e. sporting activities, activities with risk to participants.

Designated officers for EVOLVE approval are identified according to the Visit Form request.

- Applications relating to Sport and Outdoor Education excursions should be directed to the Active Schools and Community Sport Manager.
- Applications relating to Duke of Edinburgh or Community Learning and Development excursions should be directed to the CLD Youth Services Manager.
- Applications relating to Musical Performance excursions should be directed to the Principal Officer of Instrumental Music.
- Applications relating to Cultural or Educational excursions should be directed to the Community Arts Coordinator.

Please note that Visit Form applications which are submitted through EVOLVE must be done so with all relevant documentation at least four weeks before the proposed excursion (eight weeks for a foreign excursion).

The below steps show the EVOLVE process:-

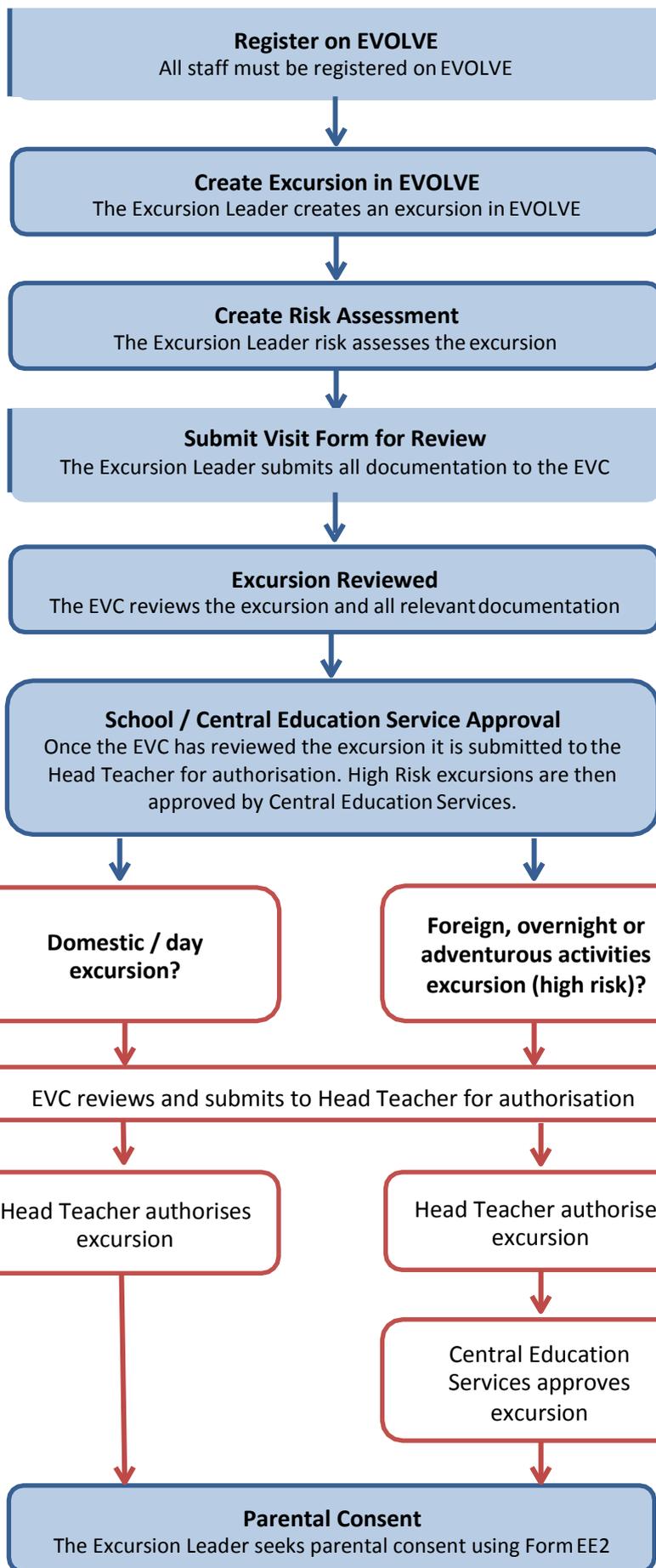
1. All staff members involved in organising and approving excursions must be registered on the West Lothian Council EVOLVE system ([evolve.edufocus.co.uk](http://evolve.edufocus.co.uk)).
2. At the start of the planning process, the Excursion Leader drafts a Visit Form in EVOLVE by clicking on the Add tab noting all of the factors to be taken into consideration when planning the excursion.
3. The Excursion Leader undertakes a Risk Assessment of the excursion following the instructions in Section 8 Risk Assessment. All West Lothian Council excursion risk assessment templates can be found within the Resources section of EVOLVE.
4. The Excursion Leader submits the Visit Form, Risk Assessment and all other relevant information to the EVC and or Head Teacher for review.
5. The EVC and or Head Teacher reviews the Visit Form, Risk Assessment and all other relevant information, and either:
  - returns it to the Excursion Leader if more information is required, or
  - submits it to the Head Teacher for authorisation (if applicable).
6. Excursions reviewed and approved are then forwarded to Central Education Services (if applicable).
7. There are two levels of approval required, dependent on the excursion.
  - i. For all domestic, day excursions that do not include a high element of risk e.g. adventurous

activities, the EVC and or Head Teacher approve the excursion without the requirement to seek Central Education Services approval.

- ii. For all foreign, overnight or day excursions that include a high element of risk e.g. adventurous activities, approval must be provided by Central Education Services.

The EVOLVE system will automatically submit the excursion application to Central Education Services.

8. Once Head Teacher or Central Education Services authorisation is obtained, the Excursion Leader must seek parental/carer permission by using Form EE2 – Parental/Carer Agreement (Appendix E).



## 7. ROLES AND RESPONSIBILITIES

**Head Teacher Responsibilities: (or Secondary School designated member of SMT with responsibility for school excursions) will:**

- Retain ultimate responsibility for all excursions.
- Consider the EVOLVE request for authorisation of school excursions 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.
- Ensure that the excursion has suitable aims and effective ways of achieving them.
- Ensure that effective child protection procedures are in place.
- Ensure that appropriate risk assessments have been completed and proportionate safety measures put in place.
- Ensure that the needs of the staff and pupils, including training needs, have been considered
- Ensure that EE2 consent has been obtained and that parents are informed appropriately of all relevant information including emergency contacts, code of conduct etc.
- Ensure that all staff involved in excursions are competent and sufficiently experienced. Experience can be demonstrated through previous participation in an excursion of the type being planned in a role supporting an 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 (e.g. first aid, administration of medicine, etc.).
- Ensure that all staff involved in excursions are fully conversant with relevant West Lothian Council policy, guidelines and procedures.
- Ensure that the proposed excursion or activity is appropriate to pupils' abilities and behaviour.
- Ensure that insurance arrangements are in line with council policy and procedure, and that all parents are informed of the insurance arrangements.
- Ensure that financial arrangements are in line with council policy and procedure with payments for excursions made on line using iPayImpact to reduce cash handling by staff and pupils.
- Ensure that emergency and contingency procedures are in place.
- Ensure that there is an effective system in place to review and assess excursions.

**Educational Visit Coordinator (EVC) Responsibilities:**

- Be fully conversant with relevant West Lothian Council policy, guidelines and procedures, including child protection.
- Ensure that all staff involved in excursions are competent and sufficiently experienced.
- Review the Visit Form, Risk Assessment and all other relevant information and ensure that all factors have been taken into consideration during the planning stage
- Obtain approval for the excursion from the Head Teacher and Central Education Services, as required.

### **Excursion Leader Responsibilities:**

- Be fully conversant with relevant West Lothian Council policy, guidelines and procedures, including child protection.
- Select the staff for the excursion.
- Delegate responsibilities as appropriate to other members of the team, in line with the roles and responsibilities set out in this policy e.g. deputy excursion leader, first aid, administration of medicine, etc.
- Draft the Visit Form noting all of the factors to be taken into consideration when planning the excursion.
- Risk Assess the excursion.
- Liaise with parents and ensure they have received all relevant information regarding the excursion including the learning objectives, information on the venue and activities to be undertaken, insurance, transport, first aid, emergency arrangements and any periods of free time when pupils will have reduced or no direct supervision.
- Hold a parent/carer meeting for overnight or foreign excursions.
- Ensure pupils follow the Code of Conduct and maintain order and discipline.
- Inform and prepare pupils for excursion.
- Have overall responsibility during the excursion.
- Ensure EE2's are in place before the trip.

### **Staff Accompanying the Excursion Responsibilities:**

- Be made aware of the Excursion Plan and the outcomes of all risk assessments for the excursion.
- Understand the role they play in ensuring the health, safety and welfare of everyone in the group.
- Only be left in sole charge of pupils where it has been previously agreed as part of the risk assessment.
- Follow the instructions of the Excursion Leader and help with order and discipline.
- Inform the Excursion Leader if concerned about the health, safety or welfare of pupils at any time during the excursion.
- Take specific responsibility for an aspect of the excursion, in line with the roles and responsibilities set out in this policy e.g. deputy leader, first aid, administration of medicine, etc., as delegated by the Excursion Leader.

### **Parents' Responsibilities:**

- Complete form *EE2 (Parental Agreement to Educational Excursion)* for all excursions falling within the definition in this policy and agree or otherwise to their child's participation.
- Provide all information requested by the Excursion Leader in order to ensure the well-being of their child.
- If necessary, give the Excursion Leader additional, up-to-date information about their child's emotional, mental, psychological or physical health.
- Advise to whether consent is given or not to essential medical treatment.
- Acknowledge and agree expected behaviour of their child during the excursion, as outlined in the Code of Conduct.
- Provide contact telephone number(s) for the duration of the excursion.
- Prepare their child for the excursion, particularly where the need for different clothing, rules or eating arrangements have been identified.

### **Pupils' Responsibilities:**

- Not take unnecessary risks.
- Follow the instructions of the Excursion Leader and other staff including those at the venue.
- Dress appropriately.

- Be sensitive to local codes and customs.
- Comply with the Code of Conduct and behave in accordance with normal school rules at all times.

## **8. CODE OF CONDUCT**

The Excursion Leader must establish expectations of behaviour in advance for both pupils and parents. For day/evening excursions pupils and parents 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 staff including those at the venue.
- Pupils must dress appropriately.

For foreign / overnight excursions:

- A written Code of Conduct must be put in place.
- Pupils must agree to comply with the Code of Conduct.
- Parents will be asked to reinforce the excursion's Code of conduct with their child.
- Parents will be asked to agree the arrangements for sending a participant home and, if necessary, meet any costs incurred.

A sample code of conduct is attached as Appendix F.

## **9. 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 those e.g. pupils participating in educational excursions.

It is the responsibility of the Excursion Leader to carry out a risk assessment of the excursion in advance. The purpose of a risk assessment is to ensure that all significant risks have been identified and control measures put in place to mitigate those risks. The excursion must be risk assessed before it is reviewed by the EVC, before it is authorised by the Head Teacher and before Central Education Services approval is sought. The risk assessment process is ongoing and is carried out from the initial planning process to when the excursion is taking place. Once a planned excursion has reached the stage of requiring parental consent the risk assessment is reviewed to take account of any identified individual requirements which are highlighted in submitted EE2 forms.

Risk assessments templates for all cultural, sport, adventurous activities and Duke of Edinburgh excursions can be found in the Resources section of EVOLVE. Guidance on completing risk assessments can be found on the Council's website (<https://www.westlothian.gov.uk/article/29177/Risk-Assessment>).

### **9.1 Dynamic Risk Assessment**

Despite best planning, the unexpected may happen during an excursion and Excursion Leaders have to be prepared to change and adapt as required. Experience and training will enable sound judgements to be made.

The Excursion Leader and other staff should monitor risks throughout the excursion and take appropriate action as necessary. This is called *dynamic risk assessment* and includes knowing when and how to apply contingency plans where they are required. It also includes seeking and implementing advice from those with specialist expertise or local knowledge, especially with regard to higher-risk activities.

The actions taken as a result of dynamic risks assessment may be recorded after the excursion so that they can inform future planning

## **9.2 Using an External Provider**

All external providers must have risk assessments in place. Depending on the nature of the excursion and activities to be undertaken, the Excursion Leader needs to consider whether they need sight of these. For example, there is no need for the Excursion Leader to request copies of risk assessments from external providers such as museums and swimming pools which have normal public access. However, it would be prudent to discuss safety arrangements and precautions with the external provider for activities or venues of a less routine nature.

External providers' risk assessments may be incorporated into, or used as the basis for, the Excursion Leader's risk assessment, but will not remove the necessity of and responsibility for conducting risk assessments for excursions.

Risk assessments for venues or organisations providing adventurous activities should be considered by the Excursion Leader prior to booking the excursion.

## **10. FIRST AID**

First Aid must form part of the risk assessment for the excursion once the excursion has been approved. The Excursion Leader must assess what level of First Aid is likely to be required and should 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, etc.

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 (the level of the qualification (e.g. Emergency First Aid or Full First Aid certificate) is determined by undertaking a First Aid Needs assessment).

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

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

The Excursion Leader must hold written information detailing pupil'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 pupil's medical and other needs, including dietary needs. A member of staff accompanying the excursion should be identified as having responsibility for administering medication if required, in line with the council's Guidance on the Management of Medication, Medical Assistance and Therapy Intervention in Educational Provision. Training may be required for members of staff to fulfil this role.

It may be appropriate to ask a parent or a support worker to accompany a pupil in order to ensure their well-being. The following information will be required from all parents:

- 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 permission if the participant needs to administer their own medication or agreement for a member of staff accompanying the excursion to do this.
- Advice and information to assist with the preparation of an emergency plan

## **12. SUPERVISION RATIOS**

It is important to have a suitable ratio of adult supervisors to pupils for any excursion. The factors to take into consideration include:

- Previous experience of the Excursion Leader and other staff
- The venue
- The activity
- Accommodation arrangements
- Transport arrangements
- The time of year
- Medical and behavioural issues
- Gender mix of the group

Supervision ratios should be appropriate for the nature and aims of the excursion, for the age and stage of the pupils and should be made in the context of the risk assessment. The establishment of an appropriate ratio is best determined through discussion between the Head Teacher and the Excursion Leader. The Head Teacher is ultimately responsible for ensuring and approving an appropriate ratio of adults, including Excursion Leaders and other staff, to children and young people taking part. Specialist advice can be sought from Central Education Services, as appropriate.

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 in primary 3 or below as well as for pupils with additional support needs, with a minimum of two adults. 1 adult to 15 participants for children in primary 4 or above.
- 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.

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 not all activities outwith the school boundary, such as pupils attending classes at other schools or colleges, or undertaking work experience, will be subject to direct supervision. 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.

A useful reference document is 'Going Out There' and is the Scottish framework for Safe Practice in Off-site Visits.

### **13. EQUAL OPPORTUNITIES**

Equalities legislation makes it unlawful to discriminate without justification against pupils in all aspects of school life including educational 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.

Guidance on transgender pupils and students is available by accessing the below link, and this guidance is to offer practical information to all staff in West Lothian Council schools to support young people who may be transgender or gender neutral:-

[https://www.westlothian.gov.uk/media/15334/Supporting-Transgender-Young-People-in-West-Lothian/pdf/Supporting\\_Transgender\\_young\\_people\\_in\\_West\\_Lothian.pdf](https://www.westlothian.gov.uk/media/15334/Supporting-Transgender-Young-People-in-West-Lothian/pdf/Supporting_Transgender_young_people_in_West_Lothian.pdf)

Legislation makes it unlawful for a disabled pupil to be treated less favourably, 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.

## **14. CHILDPROTECTION**

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.

It is the responsibility of the Head Teacher to ensure that all accompanying staff/helpers on any kind of excursion are WLC PVG checked and have undertaken appropriate Child Protection training.

## **15. HOME HOSTING**

Home hosting is where visiting groups and individuals are accommodated as guests in the homes of local families.

### **15.1 Home Hosting on Domestic Excursions**

Home hosting arrangements must conform to the requirements of the Protecting Vulnerable Groups (PVG) scheme. The PVG scheme is managed and delivered by Disclosure Scotland and helps ensure that people who are unsuitable to work with children and protected adults, cannot undertake regulated work with these vulnerable groups. Where West Lothian pupils are to be home hosted in the UK, the Head Teacher must apply for a PVG update from Disclosure Scotland. This ensures that the PVG is fully up to date and that West Lothian Council are added to the notification list for that individual.

### **15.2 Home Hosting on Foreign Excursions**

For excursions abroad, the Head Teacher is responsible for the selection and allocation of host families and for ensuring the suitability of the match. Head Teachers should exercise their discretion using a risk-based assessment and ensure:

- coherent criteria are applied to all potential host parents in the same way
- those criteria are identified in advance and shared with potential host parents

Head Teachers should not assume that individuals are suitable for home hosting because they have children of their own or have previously acted as a host parent as these factors alone are not automatic selection criteria. Head Teachers should consider the following factors when determining whether home hosting is appropriate accommodation for their excursion:

- the age and vulnerability of the children
- the duration of the stay

- whether the children have the opportunity to meet responsible adults other than the host parents on a daily basis (i.e. the opportunity to report concerns about the host parent to another responsible adult)
- special requirements such as dietary, medical or cultural issues
- minimum standards of accommodation required

Risk Assessments must consider the various circumstances that may apply in home hosting to ensure appropriate risk management and safeguarding measures are put in place. It is recommended that home hosting accommodation should always be in pairs or multiples except in exceptional circumstances. Any departure from this recommendation must be supported by a risk assessment which records the reasons for the decision.

## 16. 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 an appropriate 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 pupils should take place. The Excursion Leader must establish rendezvous points and tell pupils 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 other 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 other staff accompanying the excursion must ensure that their mobile phones will operate in all countries to be visited.
- Pupils and their parents must be made aware that last minute changes may be necessary and that they must follow the instructions of the Excursion Leader and other 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 pupils when making any changes.
- The Excursion Leader must carry *Immediate Action* cards setting out the emergency action outlined in Section 16 Emergency Procedures in response to Category 1 to 3 emergencies.
- The Excursion Leader and other staff accompanying the excursion should know how and where to contact appropriate help, e.g., if abroad, know how to use the local telephone system, relevant local numbers and appropriate coins or cards for public telephone use.
- In the case of adventurous activities, e.g., hill walking, sailing, canoeing, etc., the Excursion Leader and other 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 in advance e.g., for coastal sailing and canoeing contact HM Coastguard.

## 17. EMERGENCY PROCEDURES

The Excursion Leader and other 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).

An incident communication plan must also be in place, should an incident occur which outlines who the Excursion Leader should contact such as the Head Teacher, Head of Service, they in turn will inform the Chief Executive/DCE, Risk and Insurance, Media and elected members as required.

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:

Category	Incident Example	Action Required
<b>Category 1</b>	<ul style="list-style-type: none"> <li>•The coach breaks down en-route or on return</li> <li>•Road works cause delay</li> <li>•Bad weather causes delay</li> </ul>	The Excursion Leader will implement contingency plans, and inform school/parents of any changes in pick-up time etc. as required.
<b>Category 2</b>	<ul style="list-style-type: none"> <li>•A pupil is injured (non-life threatening) and needs medical attention e.g. broken ankle, bad cut</li> <li>•A pupil becomes ill. e.g. appendicitis</li> </ul>	The designated member of staff will provide appropriate First Aid/Emergency Aid.
		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.
		The Excursion Leader will ensure the remainder of the group are not at risk and are appropriately supervised.
		The Excursion Leader must inform the school contact of the situation, and provide updates. The school contact will take responsibility for informing parents.

		<p>The Excursion Leader will record in writing circumstances surrounding the incident at the first opportunity, and preserve any evidence.</p>
		<p>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 the assurance that a full investigation will take place where appropriate.</p>
		<p>The Excursion Leader must refer all media representatives to West Lothian Council (01506 280000) and must not make any comment to the media.</p>
<p><b>Category 3</b></p>	<ul style="list-style-type: none"> <li>•A pupil or member of staff is seriously injured (life threatening)</li> <li>•A pupil or member of staff is killed</li> <li>•A coach or car crashes killing or injuring several of the party A pupil or member of staff goes missing</li> </ul>	<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 Senior Management Team 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 is through the school and will not permit pupils to use mobile phones</p>
		<p>The school will inform a member of the school Senior Management Team as soon as possible. The Senior Management Team will implement corporate emergency procedures including informing Corporate Communications</p>
		<p>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.</p>

		The Excursion Leader must refer all media representatives to West Lothian Council (01506 280000 and must not make any comment to the media.
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Following any serious incident, a review of the incident and how it happened must be conducted. The corporate Health and Safety team must be informed. 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.

## 18. INSURANCE

Although the council's insurance covers a range of day-to-day activities for schools, it does not cover overnight excursions. For overnight and high-risk activities, 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 e.g., residential camps, foreign travel, etc.

The council can arrange additional insurance. To obtain a quotation, contact the Financial Management Unit.

Prior to attending any externally operated facility, the Excursion Leader should confirm that the service provider has appropriate insurance in place. e.g., the transportation provider has Motor and Public Liability Insurance and the establishment to be visited has Public Liability Insurance.

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

## 19. TRANSPORT

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

- Mode of transport e.g., reputable transport provider, transport provided as part of a package, use of public transport, use of council minibus, etc.
- 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 dependent on the number and age of the pupils, and the length of the journey. If under consideration, this should be covered by the excursion 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. A full list of approved WLC transport providers can be found in the relevant section of EVOLVE.

If using a council minibus, the Excursion Leader must ensure that any staff drivers hold a driving license, have the correct entitlements on their license and must follow the council's Transport – Use

of Minibuses Policy.

Parents can provide transport for pupils and should undergo the same level of checks as a parent/carer helper. Such parents must ensure that they have appropriate insurance cover in place. All other parents should be made aware that transport will 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 should also be encouraged to consider the risk of any such arrangement. In instances where staff are providing transport using their own vehicles they will be subject to the same required checks and processes.

## **20. 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.
- Section 7 of the School Fund Account Procedures in relation to contributions received from students; all payments must be receipted using iPayImpact and accurate records of income and expenditure maintained using Fundsmaster software.

## **21. OVERSEAS EXCURSIONS**

Overseas visits include all visits outside the UK. They are almost certain to include a residential element and are likely to involve other activities which are of a sporting, cultural or adventurous nature.

Each excursion overseas will require careful planning, realistic budgeting and a thorough appreciation of the self-reliance and judgment needed when operating outwith the UK. Therefore, it is likely that Excursion Leaders will have had considerable experience of organising visits within the UK before leading visits overseas, especially to developing countries.

The standard of Health and Safety applying to overseas visits, regardless of location, activity or event, should strive to reflect that of the UK, wherever possible. Where it is not possible to guarantee parity of standards, such as fire safety in accommodation, every effort should be made to mitigate or manage the exposure to risk. Parents and pupils should be informed about any anticipated difference in standards.

The dangers of disease, civil unrest and terrorism should be assessed early in the planning process through the Foreign and Commonwealth Office (FCO) Travel Advice website <https://www.gov.uk/foreign-travel-advice>. However, there are constant changes to the levels of risk and the countries and areas they relate to, so this should be revisited regularly prior to departure.

## **22. FURTHER ADVICE**

Further advice is available from:

- Corporate Health and Safety Team
- Education Services Child Protection Officer
- Financial Management Unit (including in relation to insurance queries) and Audit and Risk Management Unit

## 23. AUDIT

For audit purposes EE2 Forms should be retained for a period of three months following the excursion, or the last of a series of repeat excursions.

## 24. ADDITIONAL INFORMATION

1. Going Out There – Scottish Framework for Safe Practice in Off-site Visits (including guidance on excursions involving adventurous or hazardous activities, residential visits and visits abroad) (available on EVOLVE)
2. West Lothian Council Health and Safety Guidance (available on My Toolkit) [http://mytoolkit.westlothian.gov.uk/home\\_hs.asp](http://mytoolkit.westlothian.gov.uk/home_hs.asp)
3. Transport – Use of Minibuses Policy (available on intranet)
4. Guidance on the Management of Medication, Medical Assistance and Therapy Intervention in Educational provision (available on intranet)
5. Edinburgh and Lothian's Child Protection Procedures (available on intranet) Farm Visits Policy (available on intranet)
6. West Lothian Council's Work Experience Policy (available on West Lothian Council website) - [https://www.westlothian.gov.uk/media/6812/Extended-Work-Experience-Policy/pdf/Extended\\_Work\\_Experience\\_Policy.pdf](https://www.westlothian.gov.uk/media/6812/Extended-Work-Experience-Policy/pdf/Extended_Work_Experience_Policy.pdf)