

**To:** Education and Children's Services Policy Board

**On:** 9 March 2023

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**Report by:** Director of Children's Services

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**Heading:** Children's Services Standard Circular 33 Update

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## **1. Summary**

- 1.1. Children's Services standard circulars provide schools and early learning and childcare centres with robust and definitive guidance to protect and support staff and children and young people.
  - 1.2. The update presented in this report relates to school excursions and residential trips in respect of trip cancellations due to pandemics which are no longer covered by the council's travel insurance policy.
  - 1.3. The standard circular noted below has been updated to ensure it is relevant with current practice and arrangements.
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## **2. Recommendations**

- 2.1. The education and children's services policy board is asked to approve an update to Standard Circular 33, Section 17 "insurance" attached as appendix 1 to this report:
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## **3. Background**

- 3.1. Children's Services standard circulars provide schools and early learning and childcare centres with robust and definitive guidance to protect staff and children and young people.
- 3.2. The update presented in this report relates to school excursions and residential trips in respect of trip cancellations due to pandemics which are no longer covered by the council's travel insurance policy.
- 3.3. A summary of these updates is provided in the table below:

<b>Standard Circular</b>	<b>Standard Circular Name</b>	<b>Update Required</b>
33	Children's Services Educational Excursions	Last update August 2016. Document now reflects current practice in relation to insurance arrangements in relation to pandemics.

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## **Implications of this report**

1. **Financial**  
Insurance processes have been updated in line with the council's insurance policy to reflect changes.
2. **HR and Organisational Development**  
None.
3. **Community/Council Planning**  
None.
4. **Legal**  
None.
5. **Property/Assets**  
None.
6. **Information Technology**  
None.
7. **Equality and Human Rights**  
The Recommendations contained within this report have been assessed in relation to their impact on equalities and human rights. No negative impacts on equality groups or potential for infringement of individuals' human rights have been identified arising from the recommendations contained in the report because for example it is for noting only. If required following implementation, the actual impact of the recommendations and the mitigating actions will be reviewed and monitored, and the results of the assessment will be published on the Council's website.
8. **Health and Safety**  
The update to these standard circulars provides schools and early learning and childcare centres with robust and definitive guidance to protect staff and children and young people.
9. **Procurement**  
None.
10. **Risk**  
None.
11. **Privacy Impact**  
None.

**12. Cosla Policy Position**

None.

**13. Climate Risk**

Energy management policies to reduce carbon emissions have been updated and information reflecting current measures to address climate change has also been updated.

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**List of Background Papers**

(a) Standard Circular 33 – Educational Excursions 18/08/2016

The foregoing background papers will be retained within children's services for inspection by the public for the prescribed period of four years from the date of the meeting. The contact officer within the service is Laura Baillie, Resources Support Manager, [laura.baillie@renfrewshire.gov.uk](mailto:laura.baillie@renfrewshire.gov.uk)

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**Children's Services**

IT/LB

09/01/23

**Author:**

Laura Baillie, Resources Support Manager, [laura.baillie@renfrewshire.gov.uk](mailto:laura.baillie@renfrewshire.gov.uk)



Children's Services  
Cotton Street  
Paisley  
PA1 1LE

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## **Children's Services**

### **Educational Excursions**

## **Table of Contents**

<b>Section</b>	<b>Page</b>
1. Introduction	2
2. Definition of Educational Excursion	2
3. Procedure for Arranging Educational Excursions	3
4. Mandatory Educational Excursion Planning Checklist	4
5. Roles and Responsibilities	7
6. Code of Conduct	9
7. Ratios	9
8. Supervision	10
9. Risk Assessment	11
10. Child Protection/Vetting Accompanying Adults	13
11. Equal Opportunities	13
12. First Aid	14
13. Transport	14
14. Accommodation	16
15. Medical and other needs	16
16. Financial	17
17. Insurance	17
18. Emergency / Contingency Arrangements	18
19. Reporting Accidents / Incidents	19
20. Post Excursion	19
21. Additional Information	19
22. Audit	19

# **Children's Services – Educational Excursions**

## **1. Introduction**

This policy is designed to ensure that risks arising from excursions are minimised, so that the safety and wellbeing of staff and pupils are protected. It is essential that excursions are properly planned. This policy is designed in line with the Scottish framework for safe practice in off-site visits "Going Out There".

The framework is aimed to provide user friendly processes compliant with health and safety legislation, aims to increase opportunities for children and young people to access their learning through off-site excursions and the outdoors, improving learning outcomes for all. Giving more children and young people access to outdoor learning and play opportunities provides invaluable life experiences which could not be achieved without 'going out there' more regularly and more frequently.

A key feature of 'Going Out There' is that it adopts a low bureaucracy, enabling approach to outdoor experience and off-site excursions, reflecting step change in the approach to educational excursions 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 excursions 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.

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.

By adopting this framework establishments will benefit from being able to access an up to date bank of generic excursion visit plans, risk assessments and operating procedures within the Council's RENFO site and access further support via [www.goingoutthere.co.uk](http://www.goingoutthere.co.uk) website. This will allow them to have confidence that the approach they are taking meets legal requirements.

## **2. Definition of a Educational Excursion**

Recognising the need for young people to be regularly involved in outdoor activity and learning, will involve establishments taking young people off-site. An excursion is any excursion that is arranged by teachers or other Renfrewshire Council staff for pupils.

This policy will apply to all excursions:-

Routine / regular excursions.

Day / evening excursions of a curricular nature.

Day / evening excursions of an extra-curricular nature.

Residential / overseas and adventure activity excursions.

For all excursions, reference should be made to the Excursions Matrix (Appendix 1) to establish permissions / advice required for particular types of excursions.

Routine and regular excursions will generally be to local venues within Renfrewshire, involve easily managed activities, happen on a regular basis and be completed within the normal establishment times. These may include excursions within the Renfrewshire

Council area to include regular excursions to swimming pools, libraries, local parks and other curriculum activities out with the establishment boundary.

Excursions in relation to school sports (i.e. school football team) may require to be held outwith Renfrewshire to enable fixtures with other local authorities to be accessed. In these circumstances only routine / regular excursions locations can be extended.

### **Adventure Activities**

If planning a visit where adventurous activities are included, i.e canoeing, rock climbing the excursion leader should consider licensing requirements. Further information is available on the Adventure Activities Licensing Authority (AALA) website.

Visit Leaders wishing to organise and deliver their own adventure activities should hold relevant qualifications, prepare relevant risk assessments, ensure equipment and supervision is in line with current advice. For either of the above professional guidance can be obtained from the Sports Development Team.

### **3. Procedure for Arranging Educational Excursions**

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

1. Approval must be sought as set out below, at the start of the planning for excursions before any arrangements are made i.e. collecting deposits.
2. The member of staff organising (Excursion Leader) should undertake the required steps within the mandatory checklist (Section 4). To include initial excursion plan and risk assessment following the guidance in Sections 5, 6,7,8 and 9 of this policy.
3. The Excursion Leader must seek appropriate professional advice (from Head of Establishment / Line Manager) depending on the nature of any activities to be undertaken i.e. residential/ overseas, adventure activities with risk to participants.
4. The Excursion Leader must seek permission by completing form EE1 – Request for Approval of Excursion (Appendix 2) and where appropriate form EE2 Head of Service Approval (Request for approval involving Residential / Overseas / Adventure Activities) (Appendix 3). These must be submitted to the Head Teacher or designated manager with responsibility for establishment excursions, along with supporting documentation including initial excursion plan, risk assessment and any professional advice sought, for approval.
5. Once the Head of Establishment / Manager and where required Head of Service approval has been obtained, the Excursion Leader must seek parental / carer permission. They should distribute appropriate Parental / Carer Agreement for the excursion to all parents / carers.
6. Once consent forms are returned from parents / carers the Excursion Leader must seek advice on any medical issues / additional support needs / other needs raised with appropriate personnel e.g. Occupational Health / Health and Safety / Additional Support Needs Team.
7. If the above steps, permission(s) and advice have 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.

#### 4. MANDATORY EDUCATIONAL 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 .....

<b>A: Initial Preparation</b>	<b>Date</b>	<b>Signed</b>	<b>Further Reference</b>
1. Establish process to be followed within Excursion Matrix			Appendix 1
2. Draft relevant Excursion Plan, Risk Assessment and Parental Consent Routine / Regular – Appendix 4 Day / Evening Excursions – Appendix 5 Residential / Overseas – Appendix 6			As appropriate Appendix 4 Appendix 5 Appendix 6
3. If applicable obtain relevant professional advice. (e.g. Adventure Activities)			Section 2
4. Seek the permission and advice as set out in Policy (Residential / overseas excursions must be provided to HQ at earliest opportunity but at very least <b>8 weeks</b> prior to departure)			Section 3 Appendix 1 Appendix 2 Appendix 3 (if appropriate)
<b>B: Detailed Preparation – Once consent obtained</b>	<b>Date</b>	<b>Signed</b>	<b>Further Reference</b>
1. Plan roles, responsibilities, pupil and staff numbers.			Sections 5, 6, 7, 8 and 9
2. Consider child protection implications and agree any necessary action.			Section 10
3. Plan first aid provision and responsible person. Ensure that procedures in place for safe carriage of medicines.			Section 12
4. Make provisional bookings for transport, equipment, accommodation etc.			Sections 13 and 14
5. 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 residential / overseas excursions, and may be considered for other excursions.			
6. Distribute appropriate – Parent / Carer Agreement to the Excursion to all parents / carers.			As appropriate Appendix 4 Appendix 5 Appendix 6



7. Seek advice from parent on any medical issues/ additional support needs raised and agree any necessary action.			Section 15
8. Plan financial arrangements including cash collection / holding.			Section 16
9. Obtain appropriate insurance information.			Section 17
10. Identify contingency and emergency arrangements, including designated establishment base contact.			Section 18 Appendix 8
11. Discuss class / office cover implications with member of staff responsible for cover.			Local Arrangements
12. Log excursion on establishment's calendar.			Local Arrangement
13. Formalise Excursion Plan and Risk Assessment Routine / Regular – Appendix 4 Day / Evening Excursions – Appendix 5 Residential / Overseas – Appendix 6			Section 9 Appendix 4 Appendix 5 Appendix 6
<b>C: Final Preparations</b>	<b>Date</b>	<b>Signed</b>	<b>Further Reference</b>
1. Confirm and record staff roles and responsibilities including supervision. Brief all staff.			Local Arrangement
2. Confirm and record contingency and emergency contacts / procedures. Appoint a deputy leader to take responsibility in the event of an emergency. Brief all staff.			Appendix 8
3. Ensure excursion party emergency contact details, copies of travel documents, insurance documents and medical papers left with establishment base designated emergency contact.			Local Arrangement
4. Confirm accommodation / travel arrangements.			Local Arrangement
5. Ensure Purchasing Card available for Residential / Overseas excursion.			Local Arrangement
6. Inform and prepare all participants on all aspects of excursion. Meetings are recommended for residential /overseas excursions, and should be considered for other excursions e.g. Adventure Activities.			Local Arrangement
7. Final excursion plan and risk assessment to be submitted to Head of Establishment, or designated Manager with responsibility excursions.			Local Arrangement
8. Provide the code of conduct to members of party, if required.			Section 6 Appendix 7

<b>D: At The Start of Excursion</b>	<b>Date</b>	<b>Signed</b>	<b>Further Reference</b>
1. Check weather forecast and road conditions.			MET Office / Traffic Scotland Websites
2. Check and record presence of all participants and change list if necessary. Ensure establishment base copy is also changed.			Local Arrangement
3. Remind participants of grouping and supervision arrangements.			Local Arrangement
4. Remind participants of contingency and emergency plans and check understanding.			Appendix 8
5. Check that pupils have sufficient supplies of any necessary medication with them, e.g. inhaler for asthma.			Appendix 15
6. Check Purchasing Card available (Residential / Overseas Excursions).			Local Arrangement
7. Check equipment.			Local Arrangement
8. Take consent forms, risk assessment, travel documents, insurance documents and medical information on excursion.			Local Arrangement
<b>E: During Excursion</b>	<b>Date</b>	<b>Signed</b>	<b>Further Reference</b>
1. Dynamic Risk Assessments throughout duration of excursion.			Section 9
2. Regular headcounts of pupils (in particular prior to departing / arriving at venues / using transport).			
<b>F: After Excursion</b>	<b>Date</b>	<b>Signed</b>	<b>Further Reference</b>
1. Inform establishment base of safe return if the excursion is out with normal daytime hours.			Local Arrangement
2. Return resources, consent forms etc.			Local Arrangement
3. Submit accident / incident reports if necessary.			Section 19
4. Review the excursion and implement any action required on the Debrief Form.			Section 19 Appendix 9
5. Ensure all documentation is kept for 1 year.			

## 5 Roles and Responsibilities

### Employer's Responsibilities

- Provide local authority guidelines to Heads of Establishment / Managers and Excursion Leaders
- Assess proposals for certain categories of excursion (Residential / Overseas)
- Have emergency procedures in place for dealing with major incidents / emergencies
- Ensure training needs have been addressed
- Provide access to named staff for advice
- Have appropriate insurance cover in place
- Provide access to technical advice where necessary
- Have in place procedures to monitor and review off-site excursions and activities

### Head of Establishment / Manager with responsibility for excursions

Heads of Establishment / Managers are expected to follow and implement guidance to ensure their responsibilities are fulfilled and that outdoor learning experiences and off-site excursions can occur frequently and regularly and are managed safely.

They should:

- Consider the Request for Approval of Excursion form EE1 submitted in relation to each proposed excursion.
- Be fully conversant with the relevant Renfrewshire Council policy and take overall responsibility for their application to each excursion.
- Ensure the excursion has suitable aims and effective ways of achieving them.
- In the instance of residential / overseas excursions, seek approval from Head of Service, form EE2 in line with agreed timescales.
- Ensure that all staff involved in excursions are fully conversant with this policy.
- Ensure that staff involved in the excursion 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 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 (i.e. first aid, emergency procedures).
- Ensure that the 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 Excursion plans and risk assessments have been completed and proportionate safety measures put in place.
- Ensure that appropriate child protection procedures are in place.
- Ensure the ratio of other accompanying adults to participants is appropriate (See Section 7).
- Ensure arrangements have been made for the medical needs and additional support needs of all the participants.
- Ensure the employer's policy on the administration of medicines has been followed.
- Ensure adequate first aid provision will be available.
- Ensure the mode of travel and travel arrangements are appropriate.
- Ensure that insurance arrangements are in line with Council policy and procedure, and that where required parents / carers are informed of the

- insurance arrangements.
- Ensure that financial arrangements are in line with Council policy and procedure, including cash collection and cash holding.
- Ensure there is a contingency plan, with clear lines of responsibility, which will cover incidents such as adverse weather, travel delays including a late return home.
- Devise an effective system to review and assess excursions.

The Head of Establishment / Manager will retain ultimate responsibility for all excursions.

### **Excursion Leader's Responsibilities**

Excursion Leaders will consult with and seek advice and guidance from their Head of Establishment / Manager and local authority with regard to up-to-date agreements about practice and procedure in excursions. They should:-

- Undertake the mandatory steps set out in Section 3 of this policy. Complete the **mandatory** excursion planning checklist in Section 4, relevant excursion plan and risk assessments etc.
- Those in charge of participants have a common law duty to act as any reasonably prudent parent would and to do their best to ensure the health and safety of everyone in the group.

The Excursion Leader will take responsibility during the excursion.

### **Excursion Assistant (Accompanying Adults) Responsibilities**

Excursion Assistants, including parents and carers supporting excursions as well as volunteers working for service providers, have an important role in supporting and enabling outdoor learning experiences and off-site excursions. They can help with the running of an activity and be part of the supervision ratio where competent to do so. Excursion Assistants should be carefully selected, briefed and prepared for their role. They should:-

- Be aware of the excursion plan and relevant risk assessment(s).
- Understand how they can ensure the health and safety of everyone in the group.
- Only be left in sole charge of participants where it has been previously agreed as part of the risk assessment.
- Follow the instructions of the Excursion Leader and help with control and discipline.
- Inform the Excursion Leader if concerned about the health or safety of participants at any time during the excursion.

### **Parents' Responsibilities**

Parents should be able to make an informed decision on whether their child should participate in an excursion and will need to:

- Complete consent form for agreement to the excursion and medical treatment.
- Inform the establishment if they decide to opt out.
- Confirm relevant aspects of ability and fitness of their child, and any particular medical or other needs.
- Provide the Excursion Leader with all information requested to include emergency contact number(s).
- Acknowledge and agree expected behaviour of their child during the excursion,

- including the Code of Conduct.
- Prepare their child for the excursion, especially when the establishment has identified the need for different clothing, rules and eating arrangements.

### **Participant's Responsibilities:**

In agreement with parents and Excursion Leader participants will:

- Not take unnecessary risks.
- Follow the instructions of the Excursion Leader, excursion assistants and other supervisors including those at the venue.
- Dress and behave sensibly and responsibly.
- Be sensitive to local codes and customs.
- Look out for anything that might hurt or threaten themselves or anyone in the group and inform the Excursion Leader, Excursion Assistant or venue supervisor about it.
- Comply with the participants' Code of Conduct.
- Any participants whose behaviour may be considered inappropriate or a danger to themselves or to the group may be stopped from going on the excursion. The aims of the excursion for these participants should be fulfilled in other ways wherever possible.

## **6. Code of Conduct**

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

They should be informed that:

- normal establishment 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 for the excursion activity.

A written code of conduct must be put in place for residential / overseas excursions. The Excursion Leader must make it clear to participants they must accept the code of conduct as established in advance of the excursion. Parents/carers will be informed 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 7.

## **7. Ratios**

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

- The participants, including Excursion Leader and Assistants.
- Previous experience (of participants and leaders).
- The venue.
- The activity.
- Getting there.

- The time of year.
- Medical and behavioural issues.

Supervision ratios should be appropriate for the nature and aims of the excursion, the age and stage of the participants, and be agreed in the context of the risk assessment.

The following **minimum guidelines should be applied** when considering adult to participant ratios:

1. 1 adult to 15 participants where the element of risk to be encountered is similar to that generally encountered in daily life, e.g. excursions to museums, to the cinema etc;
2. 1 adult to 10 participants for residential and all overseas excursions;
3. 1 adult to 6 for very young children (pre-five settings).

For children and young people with additional support needs, the ratio will depend on the specific needs of the participants and ratios of 1 adult to 2 pupils will be more normal and in some circumstances the participant will require the support of a personal assistant.

The Head of Establishment / Manager is ultimately responsible for ensuring and approving the appropriate ratio of adults, including Excursion Leaders and Excursion Assistants, to children and young people taking part.

## **8. Supervision**

The Excursion Leader has overall responsibility for supervision during a trip. Breaks from this responsibility during the excursion need to be clearly identified, with clear hand over arrangements, and co-ordinated by the Excursion Leader. All adults who are in a supervisory role have a duty of care for the group at all times. There is no break from this responsibility during the trip.

There are numerous methods of supervising groups and examples can be found within the "Going Out There" toolkits but general consideration should be given to the following:

- Establishing rendezvous points
- Carrying out regular head counts
- Wearing easily identifiable clothing
- Having a buddy system
- Splitting large groups in to smaller groups with an identified leader
- Consider if higher risk activities will need greater adult supervision for example 1-6 on river activities, 1-3 in dinghy sailing etc.

The risk assessment process should identify suitable levels and methods of supervision. Consideration should be given to keeping parents informed about the supervision arrangements.

There may be times during an excursion where the participants come under the care of a third party (e.g. an outdoor instructor). In these circumstances, however, it must be realised that the Excursion Leader still retains ultimate responsibility. If any concerns arise, the Excursion Leader should discuss them directly with the third party in the first instance and then withdraw the group from the care of the third party if the problems are not resolved.

## **Remote Supervision**

Remote supervision is the term used when the leader is not directly present with participants. Remote supervision comes in varying degrees and is used in a variety of circumstances. In its simplest form participants may be given time to look round a museum on their own: at the other end of the spectrum, young people may take part in wild country expeditions where they have limited contact with their Excursion Leaders for long periods of time.

Working without immediate supervision can help learners to develop independence and self-reliance. When such an activity is planned the excursion leader must be confident that learners have the appropriate skills to operate without undue risk. Training and briefing should reflect this.

Excursion Leaders remain responsible for participants even when not in direct contact with them. They should not underestimate the challenges of remote supervision. It requires extra planning and contingencies to be put in place. This should be reflected in the excursion plan and risk assessment.

## **Unaccompanied Excursions**

There may be occasions when young people take part in excursions without any accompanying leader for the entire trip (e.g. pupils attending other high schools or colleges for classes). Before such excursions are considered, careful thought should be given to why this is deemed to be appropriate.

It may be considered that such an excursion is appropriate in the following circumstances:

- It will benefit the participant's personal development.
- It is part of a planned programme to reach an agreed outcome.
- The proposed participants are of an age commensurate with the level of self-reliance required.
- The proposed participants are assessed to have previously displayed appropriate behaviour.
- The proposed participants have been fully briefed with regards to what to do in the event of delays, missed transport links, incidents or accidents etc.
- The proposed participants have been allocated a 24/7 emergency contact support person from the organising establishment.
- The proposed participants have received skills training appropriate to the level of self-reliance required.

## **9. Risk Assessment**

The Council is responsible for health and 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 excursions.

### **Preparing Risk Assessments**

Generic risk assessments provide an overview of the foreseeable risks that might be met on an excursion with the aim of managing risks so that they are acceptable.

Leaders should use a generic risk assessment as a starting point, and add any significant and foreseeable risks specific to their excursion. This should take in to account:

- The aims and benefits of the excursion.
- The participants (including leaders and assistants).
- The venue.
- The activity.

- Getting there.
- Time of year.

Routine and Expected Excursions are by their nature low risk activities and should be quick and easy to risk assess. Higher risk activities require more detailed risk assessments which record how the risks will be reduced to an acceptable level.

The findings of the risk assessment and the relevant precautions / controls, should be agreed with and understood by all participants including Excursion Assistants (and parents where appropriate).

A range of generic risk assessments and sample specific risk assessments can be found in the attached appendices and on RENFO or within the “Going Out There” website toolkits section.

Completed risk assessments must accompany form EE1 / EE2 and be submitted to Head of Establishment / Manager for retention.

### **Dynamic Risk Assessment**

Despite the 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 Excursion Assistants should monitor the 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 needed. It also includes heeding advice and warnings 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.

### **Using an External Provider’s Risk Assessment**

In your risk assessment preparation you can use an external provider’s risk assessment for the venue/activity, however, you must also prepare a risk assessment for other factors i.e. getting to and from venue, medical needs etc.

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

It is not necessary to ask for risk assessments from transport providers.

### **Preparing Participants**

It is good practice to prepare participants so that they understand the aims and nature of the excursion. Risk education is an important aspect of young people’s development and participants should take part in planning, implementing and evaluating their own contribution to excursions where possible.

Consideration should be given to ensuring that participants understand:

- The nature and demands of the excursion.



- The supervision arrangements, including which adult is responsible for them.
- The standards of behaviour expected at all times and not just during activities.
- What to do in the event of an accident / incident.
- Their role in ensuring the safety of all participants.
- The Code of Conduct.

## **10. Child Protection / Vetting Accompanying Adults**

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 roll of Designated Member of staff for Child Protection and will follow Renfrewshire Councils 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.

### **Vetting Accompanying Adults**

Parents and other volunteers are often an essential part of supervision ratios. When they assist on excursions they are called “accompanying adults”.

The main decision that has to be made is whether an accompanying adult needs to be vetted. The essential factor in this decision is whether the accompanying adult is doing ‘regulated work’. This term is explained in Chapter 2 of the Disclosure Scotland guidance under ‘Protection of Vulnerable Groups’ (PVG). If an accompanying adult is carrying out regulated work then they must be vetted.

There is a five step assessment process in order to determine whether or not someone is doing regulated work. This five step process must be applied in all cases.

## **11. 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 the 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.

## **12. 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 parental consent form or otherwise disclosed to the establishment. 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 residential and overseas excursions a detailed risk assessment should be carried out by the trip leader which should be discussed with the head teacher to decide on whether the location and activities to be carried out on the trip merit a trained first aider to be present.

Areas for consideration are detailed below:

- the nature of the trip and activities the pupils will be taking part in;
- the country they are visiting;
- how near they are to medical facilities;
- what first aid provision is available on the site they will be visiting;
- pupils with specific medical needs; and
- requirement for administration of medicine for pupils

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 removed from emergency assistance.

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 removed from emergency assistance.

## **13. Transport**

The Excursion Leader must give careful thought to planning transport. It is important to ensure that the travel plan is suitable for the age and nature of the participants. Consideration should be given to the following:

- The length, nature and complexity of the journey and implications for supervision etc.
- Selecting the right mode(s) of transport including use of public transport.
- Using a reputable transport provider.
- Contingency plans.
- The time of year and weather.
- The needs of any participants with limited mobility.

Service providers such as transport operators are all subject to regulation and inspection and Excursion Leaders can use them in the same way as any member of the public. There is no requirement to obtain risk assessments from transport providers.

## **Supervision on Transport**

The Excursion Leader is responsible for the party at all times including maintaining good discipline whilst travelling, and during any unsupervised periods (e.g. motorway services, ferries etc.). The level of supervision that is necessary should be considered as part of the risk assessment, taking in to account:

- The age and nature of the participants.
- The mode of transport and the implications for supervising participants.
- The length, nature and complexity of the journey.

When planning transport, consideration should be given to the following:

- Preparing participants for the journey.
- The comfort and safety of participants.

The driver should not normally be responsible for supervision. Driver supervision may be sufficient if a small number of participants are being taken on a short journey.

## **Hiring Coaches and Buses**

Excursion Leaders should use internal transport services or contractors who are within the procurement framework of providers.

Coaches and buses should be hired from a reputable company. Professional operators of buses and coaches are legally required to be licensed. Compliance with the various legal requirements is their responsibility not the hirer's.

When planning a long journey Excursion Leaders should ensure they agree a plan in advance with the company, for driver hours and rest periods.

Excursion Leaders are responsible for immediately raising any concerns over driver behaviour (speeding, tiredness, aggressive driving, attitude etc.). If there is no satisfactory resolution consideration has to be given to stopping the journey.

## **Licences and Permits for Driving Minibuses**

Excursion Leaders should refer to guidance within the Council's Fleet Management Policy. Drivers of any vehicle must ensure that they have the correct entitlement on their licence. The law on driver licensing no longer permits car drivers who pass their test after 1 January 1997 to drive vehicles with more than 8 passenger seats without passing a Passenger Carrying Vehicle PCV driving test.

## **Establishment Minibus**

The minibus should be properly maintained in accordance with the Council's Fleet Management Policy. Although the Head of Establishment / Manager is ultimately responsible for the establishment's minibus, the driver is responsible for the vehicle when driving it. The minibus driver must be qualified to drive a minibus and have a valid driving licence.

The driver should not normally be responsible for supervision. Driver supervision may be sufficient if a small number of participants are being taken on a short journey.

## **Private Cars**

Excursion Leaders and others who drive participants in their own car must ensure their passengers' safety in line with legal requirements. This includes:

- Ensuring that front and back passengers wear properly adjusted seat belts
- Having appropriate seating in place for children (including booster seating and

- seatbelt adjustment devices)
- Ensuring that the vehicle is roadworthy and has a valid MOT
- Ensuring that there is appropriate insurance cover for carrying the participants. This will require cover for business purposes. (Heads of Establishment / Manager should check this is in place)

Anybody using their own car to transport participants should be carefully selected, and vetted if appropriate, by the Head of Establishment / Manager.

If using private cars to transport participants it is essential that parents are informed of the arrangements, to enable them to make an informed decision.

When using private cars, it is advisable that the driver is not put in a position where they are alone with a participant. The Excursion Leader should arrange a central dropping point for all participants rather than individual home drops.

## **14. Accommodation**

In the planning stage the Excursion Leader should consider whether the accommodation:

- Fits with the aims and objectives of the excursion.
- Suits the needs and requirements of all participants (including disabled access).
- Is suitable for the gender mix of the group.
- Provides adequate security and privacy for all participants.
- Complies with appropriate safety standards for the nature of the excursion.

Prior to the excursion the Excursion Leader should if possible / appropriate:

- Make a prior visit.
- Obtain a floor plan showing the location of the group's rooms. Ideally the rooms should be close together with the leaders' quarters located to enable adequate supervision.
- Allocate rooms to participants.

On arrival the Excursion Leader should:

- Ensure all participants are aware of the lay-out of the accommodation and its fire precautions/exits.
- Check the accommodation to ensure it is safe and fit for purpose.
- Check for any potential hazards (balconies, electrical connections, access to other rooms etc.) and if necessary establish control measures to deal with these. Where the hazards are extreme or cannot be managed adequately consideration has to be given to insisting on alternative accommodation.
- Ensure all participants are aware of the system to ensure their overnight security.
- Ensure participants are aware how to obtain assistance if required during the night.

## **15. Medical and other Needs, including Dietary Needs**

A summary of excursion types, with recommendations regarding parental consent and medical information, can be found in the matrix on Excursion Approval, Medical Information and Parental Consent within Appendix 1.

The majority of off-site excursions are a normal part of educational and other service provision and within this policy are referred to as 'Routine and Regular Excursions'. For this category of trip the process of gaining consent and informing parents should be kept as simple as possible and must not be restrictive.

For Routine and Regular excursions, and the majority of Day Excursions, the medical information which has been obtained at the start of an academic session (or other appropriate point) is sufficient. As part of this, parents should have been asked to agree to the participant receiving emergency treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities.

It is recommended that for more complex excursions parents are asked to provide an update on any medical issues as part of the trip specific consent.

Excursion specific parental consent is usually only requested for activities or excursions that involve a higher level of safety management. These include:

- Residential / Overseas excursions
- Adventure activities
- Hazardous environments
- Remote supervision or unaccompanied excursions

Sample consent forms for different types excursions can be found within Appendices 4, 5 and 6.

## **16. Financial Information**

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

- The Council's Financial Regulations (Standard Circular 58)
- School Funds (Standard Circular 23)

Further guidance or assistance is available from Children's Services, Finance Section.

## **17. Insurance**

The council has various insurance policies in place which provide different types of cover, including travel insurance . There is cover in place to adequately cover participants travelling on authorised excursions organised by the Council. Individual establishments should therefore **not** arrange any additional insurance in respect of participants travelling on the excursion.

Cover is in place in relation to a range of scenarios including personal property/ money loss, personal liability, cancellation/ curtailment/ delays, natural catastrophe, kidnap, hijack, and/ or harm such as injury or death. Specific levels of cover should teachers be asked by any parents for such details prior to an excursion is available from RENFO or the Insurance Section.

Establishments must understand in relation to personal property and money that while these items are covered by the council's travel insurance policy, the spirit of the policy is such that the council will only permit claims to its insurers for what is considered 'reasonable' in relation to the specific trip in question. It is essential therefore that as part of the planning process for the excursion, the establishment decides on what personal items will be permitted and the limit of money that each pupil will be permitted to bring on the excursion and be insured for.

Establishments must ensure that parents are made aware of the 'approved' items and money limits and that if a pupil chooses to bring items or sums of money outwith what has been approved, this is at their own risk and cannot be claimed for through the council's travel insurance policy.

The Excursion Leader should ensure while travelling that they keep with them the details they require to contact the insurers directly for any support required.

It should be noted that since the Covid-19 pandemic, **trip cancellations due to pandemics are not covered by the council's travel insurance policy** therefore parents must be made aware of this so they can take account of it when deciding if they wish to sign their children up for trips or not, but additionally if **any parent** (not establishment), wants to independently arrange their own travel insurance for **their child** (superseding the council's travel policy), then they are of course at liberty to do so.

## **18. Emergency / Contingency Procedures**

Emergency procedures are an essential part of planning an excursion.

Prior to departure on any excursion, information should be left with a pre-arranged establishment based contact. This information should include:

- Group names.
- Excursion location and itinerary.
- Expected timings.
- Transport arrangements.
- Emergency contact details for participants.
- Medical information regarding participants.

An Emergency Action Form (Appendix 8) should be completed for every excursion and carried by the Excursion Leader.

### **Establishment Based Contact**

The establishment based contact has a key role in the emergency procedure. It is their role to ensure that:

- Information regarding an excursion is kept in a secure but accessible location.
- If an excursion is returning out-with normal hours, or involves an overnight, that excursion information is readily accessible.
- They know who to contact if an accident or incident is of a serious nature.
- They are available 24/7 throughout the duration of the excursion.

The nature, duration and type of excursion will determine the most appropriate Establishment Based Contact. For excursions of a longer duration or those involving higher risk activities it is recommended that more than one Establishment Based Contact is provided.

### **Immediate Action in an Emergency**

In the event of an emergency the immediate priorities of the Excursion Leader or any Leader who has to deputise for them, are to:

- Assess the situation.
- Safeguard the uninjured members of the party.
- Attend to the casualties.
- Inform the emergency services.
- Inform the establishment based contact (if not available HQ Emergency Contact).
- Continue to manage the situation to the best of their ability.

### **Media / External Contact**

If an incident or accident is likely to attract media attention, it is important wherever possible that communication with the media and other external agencies is undertaken by someone trained in this role. The following points should be considered:

- Nobody in the party should speak to the press.
- Media enquiries should be referred to Children's Services headquarters who will liaise with the

- communications unit.
- Opportunities for external agencies to get access to group members and leaders should be minimised.
- Group members should be discouraged from phoning home in the immediate aftermath of an incident - inaccurate or incomplete information might cause unnecessary speculation and anxiety. They should also be discouraged from taking personal photographs of accident sites.
- Casualty names should not be released externally.
- Nobody should discuss legal liability with other parties.

## **19. Reporting Accidents and Incidents**

The Council's Accident Incident Recording Database (AIRD) should be used to record all accidents and incidents. Any lessons learned as a result of a 'near miss' should be incorporated into risk assessments and operating procedures.

## **20. Post Excursions**

A debrief form should be completed for all excursions and appropriate actions followed up (Appendix 9).

In the event of a serious incident where the Council's emergency procedures have been utilised, it would be appropriate to conduct a review of the incident and how it happened and of how the procedures were implemented.

The purpose of the review should be to:

Establish the facts

Determine whether there are lessons to be learned

Provide information to parents

Exchange information with statutory investigation bodies as required e.g. police, HSE

Manage media enquiries.

Any lessons to be learned should be incorporated into risk assessments, operating procedures and emergency planning arrangements.

## **21. Additional Advice / Information**

Children's Services, Resources Support Manager  
Corporate Health and Safety Team  
RENFO – Risk Assessment Templates

[www.goingouthere.co.uk](http://www.goingouthere.co.uk)

## **22. Audit**

For audit purposes, following excursion documentation below should be retained for a period of at least 6 months:-

Mandatory Checklist

Form EE1

Form EE2

Finalised Excursion Plan

Finalised Risk Assessment

## EXCURSIONS MATRIX

Excursion Approval, Medical Information and Parental Consent				
Type of excursion	Information provided to parents	Medical information	Arrangement for consent	Authorisation of excursion
Routine and Regular excursions (Within Renfrewshire)  N.B. Can be extended beyond Renfrewshire for school sporting events to other local authority venues  <b>Refer to Appendices 2,4, 8 and 9</b>	Information provided to parents: <ul style="list-style-type: none"> <li>• During induction meetings</li> <li>• Yearly parents' meetings</li> <li>• Newsletters</li> <li>• Handbook</li> </ul>	Annual update obtained from parents and retained in establishment	Consent given by parents using a consent form, which is completed at induction or annually	Head of Establishment / Manager
Day excursions  <b>Refer to Appendices 2, 5, 8 and 9</b>	Specific information supplied in writing	Annual update obtained from parents and retained in establishment	Consent given by parents using annual consent form or a trip specific form  (Specific trip consent is required if the excursion will involve adventure or coastal activities or will return out-with normal hours)	Head of Establishment / Manager
Residential / overseas excursions  <b>Refer to Appendices 2, 3, 6, 7, 8 and 9</b>	Specific information supplied in writing and meeting with parents if required	Provided as an integral part of the consent form	Trip specific consent form required	Head of Establishment / Manager <b>AND</b> <b>Head of Service Approval Required</b>
Excursions which include activities with special planning considerations <ul style="list-style-type: none"> <li>• Adventurous activities</li> <li>• Hazardous environments</li> </ul> Guidance may be sought from Sports Development Team  <b>Refer to Appendices 2, 3, 6, 7, 8 and 9</b>	Specific information supplied in writing as determined by excursion type	Provided as determined by excursion type	Consent determined by excursion type	Head of Establishment / Manager <b>AND</b> <b>Head of Service Approval Required</b>



## EE1 – Request for Approval of Excursion

This form should be completed by the Excursion Leader in charge of a proposed excursion and submitted to the head of establishment / manager for approval at the earliest possible time. Day excursions may be approved by the head of establishment / manager, additional consent/permission for residential / overseas excursions is required from Head of Service (form EE2).

When approval is given, a copy should be retained by the head of establishment / manager and Excursion Leader. Any subsequent changes in planning, organising, staffing etc should be communicated to the head of establishment / manager for approval.

**Not all sections will be relevant to every proposed excursion.**

Name of establishment			
Excursion Leader			
1	Purpose of proposed excursion and specific educational objectives		
2	Type of Excursion (please tick one box):- Routine / Repeat <input type="checkbox"/> Routine / Repeat (Sporting Event) <input type="checkbox"/> Day / Evening <input type="checkbox"/> Residential / Overseas / Adventure Activity <input type="checkbox"/> (Please complete Form EE2 (Appendix 2) if you have ticked this box)		
3	Place(s) to be visited		
4	Dates and times: Date Leaving: _____ Time: _____ Date returning: _____ Time: _____		
5	Numbers Participating Staff _____ Pupils _____ Age Range _____		
6	Transport arrangements		

7	Name of organising company / agency (if any)
8	Estimated cost per pupil
9	<p>Proposed accommodation to be used</p> <p>Name:</p> <p>Address:</p> <p>Telephone:</p>
10	Details of the programme of activities / travel arrangements
11	Details of any hazardous activity and the associated planning, organisation and staffing and additional insurance arrangements if required.
12	Members of STAFF accompanying the party and specific responsibilities (eg first aid, depute leader).
13	Name, address and telephone number of the base / office liaison officer (ie contact person in the home area) who will hold copy information about the excursion

14	<p><b>TO THE HEAD OF ESTABLISHMENT</b></p> <p>I request your approval for the proposed excursion, full details of which are outlined above.</p> <p>I confirm that if approval is given I will provide the information required in Sections 15 (i) and 15 (ii) within the appropriate timescales.</p> <p>Signed _____ (Excursion Leader)    Date _____</p>
----	---

15	<b>THIS SECTION IS TO BE COMPLETED BY THE HEAD OF ESTABLISHMENT / MANAGER</b>
	<p>I have studied this application and I am completely satisfied with all aspects including the planning, organisation and staffing.</p> <p>I am aware that I require to obtain Head of Service approval for this excursion (delete if not appropriate).</p> <p>Approval is given to proceed with arrangements for this excursion on the understanding that the Excursion Leader:</p> <ul style="list-style-type: none"> <li>i. Ensures that I have the completed Mandatory Checklist, all relevant information including a final list of members and a detailed itinerary at least <b>ten working days before</b> the party is due to leave.</li> <li>ii. Completes a debrief report (Appendix 9) as soon as possible but no later than <b>ten working days after</b> the party returns.</li> </ul> <p>Signed _____ Date _____</p> <p>Designation _____</p> <p>A copy of this form should be retained by the Head of Establishment / Manager; and</p> <p><b>A copy submitted to</b>  Children's Services, Establishment Excursions, Renfrewshire House, Cotton Street, Paisley or by email to <a href="mailto:excursions@renfrewshire_council">excursions@renfrewshire_council</a></p> <p>(Together with form EE2 if appropriate)</p>

## EE2 – Head of Service Approval for Excursion (Required only for Residential / Overseas)

### Sections 1 – 6 to be completed by Excursion Leader

1	Name of establishment			
2	Location to be visited			
3	Date of departure			
4	Date of return			
5	Numbers Participating		Male	Female
		A Pupils		
		B Supervising staff		
		C Other adults		
6	Mode of travel			

### To be completed by Head of Establishment / Manager

I attach copy of form EE1 for consideration ☐

I confirm that I am agreeable to approval to be given to proceed with arrangements for this excursion on the understanding that the Excursion Leader:

Ensures that I have the completed Mandatory Checklist, all relevant information including a final list of members and a detailed itinerary at least **ten working days before** the party is due to leave.

Head of Establishment / Manager Signature: \_\_\_\_\_

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

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

### Please send for approval to:-

Children's Services, Renfrewshire House, Cotton Street, Paisley, PA11LE or email to [excursions@renfrewshire.gov.uk](mailto:excursions@renfrewshire.gov.uk)

This form will be returned to Head of Establishment / Manager as soon as possible. Do not proceed with further arrangements until this has been received.

**For HQ Use Only:** Approval is granted ☐ or Approval is refused ☐

Signature: \_\_\_\_\_  
Head of Service

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

# **TEMPLATE - Excursion Plan for “Routine / Regular Excursions”**

This is a generic Excursion Plan and provides suggestions for what should be included in an Excursion Plan.

- It should give sufficient information for the Head of Establishment / Manager to approve the excursion.
- See the sample Excursion Plan for how this generic document can be used in practice

**ROUTINE EXCURSION TO** .....

ITEMS TO BE PLANNED		• Typical examples of detail to be provided
1	Information to parents/consent	<ul style="list-style-type: none"> <li>• provide information in induction material</li> <li>• give verbal reminder to group before excursion</li> </ul>
2	Staff visit to venue	<ul style="list-style-type: none"> <li>• preparatory visit to site (if appropriate)</li> <li>• carry out assessment of hazards at venue</li> </ul>
3	Staff/participant ratios	<ul style="list-style-type: none"> <li>• establish any factors affecting the ratio</li> <li>• ratios agreed by staff team</li> </ul>
4	Getting to the venue	<ul style="list-style-type: none"> <li>• how travel by vehicle will be managed</li> <li>• how travel on foot will be managed</li> </ul>
5	Equipment required	<ul style="list-style-type: none"> <li>• group personal clothing</li> <li>• list equipment to be taken by leader</li> </ul>
6	Managing the activity	<ul style="list-style-type: none"> <li>• supervision arrangements</li> </ul>
7	Medical needs	<ul style="list-style-type: none"> <li>• gather medical details of participants</li> <li>• carry medicines as necessary</li> </ul>
8	Weather	<ul style="list-style-type: none"> <li>• obtain forecast</li> <li>• change plan if necessary</li> </ul>
9	Emergency procedures	<ul style="list-style-type: none"> <li>• leave list of participants left at establishment</li> <li>• arrange contact person at base to be available</li> </ul>
10	External provider (if applicable)	<ul style="list-style-type: none"> <li>• discuss programme to be supplied</li> <li>• check provider's insurance</li> </ul>
11	Risk Assessment completed	<ul style="list-style-type: none"> <li>• see generic and specific Risk Assessments</li> <li>• review Risk Assessment after excursion if necessary</li> </ul>
	Add further items as required	<ul style="list-style-type: none"> <li>• List details for specific activity</li> </ul>
<b>Routine Excursion Plan approved by Head of Establishment</b>		<div>Signature</div> <div>Date</div> <div>Date for review</div>

## EXAMPLE - Excursion Plan for a “Routine / Regular Excursion”

This is a specific Excursion Plan. It provides an example of how an actual Excursion Plan might be prepared.

- It should give sufficient information for the Head of Establishment to approve excursions to a venue.

### ROUTINE EXCURSIONS TO: *Green Loch Park*

ITEMS TO BE PLANNED		• How/when this will be done
1	Information to parents/consent	<ul style="list-style-type: none"> <li>• Parents are told at induction about excursions to Green Loch Park as part of establishment curriculum.</li> <li>• They are given an opportunity to withdraw their children from the activity if they wish (via website / newsletter) .</li> <li>• Clothing reminders are given out at each parents' evening.</li> </ul>
2	Staff visit to venue	<ul style="list-style-type: none"> <li>• The Head of Establishment and all staff have visited Green Loch Park to risk assess the venue and plan activities</li> <li>• New staff will work alongside experienced staff to start with.</li> </ul>
3	Staff/participant ratios	<ul style="list-style-type: none"> <li>• Nursery ratio 1:5, P1-7 1:10</li> <li>• The class teacher will decide if extra help is required for specific participants or activities</li> </ul>
4	Getting to the venue	<ul style="list-style-type: none"> <li>• groups will walk to the park (about 10 minutes).</li> <li>• The only significant hazard is crossing Green Road. The group will walk to the pedestrian crossing.</li> <li>• Staff will wear high vis vests</li> </ul>
5	Equipment required	<ul style="list-style-type: none"> <li>• The group will wear their outdoor clothing</li> <li>• Staff will carry spare clothes during the winter months</li> <li>• A first aid kit will be taken</li> <li>• Bags and gloves will be taken for litter</li> </ul>
6	Managing the activity	<ul style="list-style-type: none"> <li>• The only significant risk at the park is falling into the Green Loch which is very shallow. When working in the pond area pupils will be supervised at all times</li> </ul>
7	Medical needs	<ul style="list-style-type: none"> <li>• The class teacher will make sure that medical details are known and that any medicines are carried</li> </ul>
8	Weather	<ul style="list-style-type: none"> <li>• If there are any concerns about adverse weather a forecast will be obtained</li> <li>• The excursion will be re-arranged if necessary or plans adapted</li> </ul>
9	Emergency procedures	<ul style="list-style-type: none"> <li>• The list of participants and activity details will be left in the establishment office.</li> <li>• The class teacher will carry a mobile and contact the establishment office if necessary.</li> <li>• The office has been instructed to contact the Head of Establishment if help is needed.</li> </ul>
10	External provider (if applicable)	<ul style="list-style-type: none"> <li>• If the Rangers or other outside providers are helping out this will be organised well in advance</li> <li>• The rangers are council employees passed to work with young people. No further checks are required.</li> </ul>
11	Risk Assessment completed	<ul style="list-style-type: none"> <li>• Staff completed the Risk Assessment.</li> <li>• It has been discussed by the Head of Establishment and all staff.</li> <li>• New staff will be made aware of the Risk Assessment</li> </ul>
Routine Excursion approved by Head of Establishment		<div> <div>J. Newton</div> <div>Signature</div> </div> <div> <div>12.9.14</div> <div>Date</div> </div> <div> <div>12.9.15</div> <div>Date for review</div> </div>

## TEMPLATE - RISK ASSESSMENT- Routine / Regular Excursions

<b>DESCRIPTION OF TASK / ACTIVITY</b>		<b>Generic Risk Assessment for Routine Excursions</b> Routine Excursions typically involve low risk activities at venues that are regularly used by an establishment. They usually take place in the local area. This is a generic risk assessment identifying typical hazards and control measures. The establishment should ensure a specific risk assessment is carried for the venues they use on a regular basis.					
<b>LOCATION</b>							
<b>Item</b>	<b>What are the hazards?</b>	<b>Who might be harmed? And how?</b>	<b>What are you already doing, i.e. what Control Measures are already in place?</b>	<b>Do you need to do anything else to manage this risk?</b>	<b>Action by whom?</b>	<b>Action by when?</b>	<b>Done</b>
1	Transporting group members by vehicle (list specific hazards here)	Group members	Adequate staff ratio Set clear procedures for behaviour on transport Monitor driving standards Emergency procedures in place	(list specific control measures here)			
2	Walking to venue (list specific hazards here)	Group members	Adequate staff ratio Ensure staff are familiar with the route Set clear procedures for walking as a group Identify and manage crossing roads Emergency procedures in place	(list specific control measures here)			
3	At the venue (list specific hazards here)	Group members	Adequate staff ratio Ensure staff have prior knowledge of the venue Carry out staff training for new staff Carry out a dynamic risk assessment Identify suitable supervision techniques Have a Plan B available Emergency procedures in place	(list specific control measures here)			
4	Adverse weather (list specific hazards here)	Group members	Obtain weather forecast if necessary Issue clothing advice and check before excursion Carry spare clothing when necessary Have a Plan B available Emergency procedures in place	(list specific control measures here)			
<b>Prepared by:</b>				<b>Date:</b>			
				<b>Date for review:</b>			
<b>Checked and Approved by:</b>				<b>Date:</b>			

## EXAMPLE - RISK ASSESSMENT - Routine / Regular Excursions

<b>DESCRIPTION OF TASK / ACTIVITY</b>		Loch View Primary School Range of activities											
<b>LOCATION</b>		Green Loch Park											
Item	What are the hazards?	Who might be harmed? And how?	What are you already doing, i.e. what Control Measures are already in place?	Do you need to do anything else to manage this risk?	Action by whom?	Action by when?	Done						
1	<b>Walking to venue</b> <i>Crossing Green Rd</i>	<i>Group members</i>	<i>Adequate staff ratio for group Staff are familiar with the route - use pedestrian crossing on Green Road Group has been briefed about how to cross in groups with nominated staff member Emergency procedures in place</i>	<i>Staff should wear high vis vests - these need to be bought</i>	<i>JJ</i>	<i>Aug 2013</i>							
2	<b>At the venue</b> <i>Glass on ground</i> <i>Falling in pond</i>	<i>Group members</i>	<i>Adequate staff ratio Staff have prior knowledge of the venue All new staff familiarised with venue Staff will check for glass at the bench area on arrival Pupils will be supervised at all times around the pond If the pond banks are muddy and slippery staff have a Plan B available Emergency procedures in place</i>										
3	<b>Adverse weather</b>	<i>Group members</i>	<i>Weather forecast will be obtained if necessary Clothing to be checked before leaving Staff will carry spare clothing when necessary Staff will have a Plan B available Emergency procedures in place</i>										
<table border="1" style="width: 100%;"> <tr> <td rowspan="2" style="width: 20%;"><b>Prepared by:</b></td> <td rowspan="2" style="width: 40%;">Whole staff team</td> <td style="width: 20%;"><b>Date:</b></td> <td style="width: 20%;">12.9.13</td> </tr> <tr> <td><b>Date for review:</b></td> <td>12.9.14</td> </tr> </table>								<b>Prepared by:</b>	Whole staff team	<b>Date:</b>	12.9.13	<b>Date for review:</b>	12.9.14
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<b>Checked and Approved by:</b>	J. Newton (Head of Establishment)	<b>Date:</b>	12.9.13										



## EXAMPLE: Parental Information and Consent for Routine / Regular Excursions

For excursions of a routine nature establishments may decide to gain consent on an annual basis. It is important to outline:

- The type of excursion that consent is being given for
- The range of activities likely to be undertaken
- Supervision arrangements
- Insurance cover

A worked example of an annual consent letter is provided below:

<b>Loch View Primary School</b>	
<b>ANNUAL CONSENT FOR ROUTINE / REGULAR OFF-SITE EXCURSIONS</b>	
<b>Dear parent/guardian</b>	
<b>Routine off-site excursions</b> It is our policy to put classroom studies into "real" situations whenever possible. Our aim is to give our children practical experience, making learning more relevant and exciting. It also keeps us all more active and gives us the opportunity to work in small groups on a wide variety of tasks.	
<b>Range of activities</b> We regularly use Moss Bank and Jake's Field which are next to the school for younger pupils, and walk to Green Loch Park and The Dark Wood which are no more than 10 minutes from the school with the older classes. We use these venues for a wide range of activities covering all areas of the curriculum.	
<b>Supervision arrangements</b> We always send several adults with each class in order to make sure they are looked after in line with our authority's requirements. If you are interested in becoming one of our helpers on these occasions please let us know.	
<b>Insurance</b> Anyone participating in a school excursion is automatically covered by the authority's insurance. We can give you a copy of this if you want to see it.	
<i>J. Newton</i> Headteacher <i>Please complete and return the attached slip</i> .....	
<ul style="list-style-type: none"><li>• I have read the information provided regarding routine off- site excursions.</li><li>• I give permission for my child to go off-site on a regular basis as part of the school curriculum and understand that this may involve them in a wide range of activities.</li><li>• I understand that my child will always be adequately supervised, as per the Local Authority guidelines, and that whilst off-site they are covered by the Council's insurance.</li></ul>	
<b>Name of child:</b>	
<b>Date of Birth:</b>	
<b>Name of parent/guardian:</b>	<b>Relationship to pupil:</b>
<b>Signature:</b>	<b>Date:</b>

## Template - Excursion Plan for “Day Excursions”

This is a generic Excursion Plan. It provides general suggestions for what the Excursion Plan should contain.

- It should give sufficient information for the Head of Establishment to approve the excursion.

**DAY EXCURSION TO** ..... **DATE** .....

**EXCURSION LEADER** .....

**DEPARTURE TIME** ..... **RETURN** .....

ITEMS TO BE PLANNED		• Typical examples of detail to be provided
1	Aims and objectives of excursion	<ul style="list-style-type: none"> <li>state the aims and objectives of the excursion</li> </ul>
2	Information to parents/consent	<ul style="list-style-type: none"> <li>information letter to be sent out</li> <li>parental consent gained</li> </ul>
3	Staff/participant ratios	<ul style="list-style-type: none"> <li>list any factors affecting the ratio</li> <li>detail ratios</li> <li>list of staff on excursion</li> </ul>
4	Venue	<ul style="list-style-type: none"> <li>provide information about specific venue</li> <li>detail any booking arrangements</li> <li>details of any preparatory excursion</li> <li>provide details for managing group at venue</li> </ul>
5	Travel/transport	<ul style="list-style-type: none"> <li>mode of travel/transport and supervision arrangements</li> <li>name and number of transport company</li> <li>planned comfort stops and supervision arrangements</li> </ul>
6	Participants	<ul style="list-style-type: none"> <li>how are participants being prepared?</li> <li>detail training/preparatory work</li> <li>outline how behaviour, risks/hazards, supervision etc will be discussed with participants</li> </ul>
8	Equipment required	<ul style="list-style-type: none"> <li>list and detail arrangements for collection of any equipment required for the activity</li> <li>First Aid kit if necessary</li> </ul>
9	Managing the activity	<ul style="list-style-type: none"> <li>supervision methods</li> <li>detail meeting times etc</li> </ul>
10	Medical needs	<ul style="list-style-type: none"> <li>detail how medical information will be obtained/shared/carried</li> <li>detail any specific concerns</li> <li>how will any required medication be carried?</li> </ul>
11	Weather	<ul style="list-style-type: none"> <li>arrangements for obtaining forecast if appropriate</li> <li>discuss severe weather alternative with Head of Establishment if necessary</li> <li>alternative plans if necessary</li> </ul>
12	First Aid provision	<ul style="list-style-type: none"> <li>detail First Aid provision at the venue</li> <li>decide if First Aid trained staff member is needed</li> <li>carry First Aid kit if necessary</li> </ul>
13	Emergency procedures	<ul style="list-style-type: none"> <li>detail where participant list will be left at establishment</li> <li>name contact person at base</li> <li>detail how staff will carry participant information (consents)</li> </ul>
14	External provider (if applicable)	<ul style="list-style-type: none"> <li>outline programme to be supplied</li> <li>establish role of external provider</li> <li>outline handover arrangements</li> <li>detail provider's insurance if appropriate</li> </ul>
15	Risk Assessment completed	<ul style="list-style-type: none"> <li>see generic and specific Risk Assessments</li> <li>discuss risks with staff and participants</li> <li>review Risk Assessment after excursion if necessary</li> </ul>
	Add further items as required	<ul style="list-style-type: none"> <li>List details for specific activity</li> </ul>

I confirm that satisfactory planning and preparation has taken place for this excursion.

I have checked that all reasonable steps have been taken to ensure the safety and wellbeing of participants.

<b>Day Excursion approved by Head of Establishment</b>	<b>Signature</b>	<b>Date</b>
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## Example - Excursion Plan for “Day Excursions”

This is a specific Excursion Plan. It provides an example of how an actual Excursion Plan might be prepared.

- It should give sufficient information for the Head of Establishment to approve the excursion.

**DAY EXCURSION TO**  
**ACTIVITY**  
**EXCURSION LEADER**

*the National Museum of Scotland*  
*S1 Studying Evolution*  
*Mrs McIntyre*

ITEMS TO BE PLANNED		• Typical examples of detail to be provided
1	Aims and objectives of excursion	<ul style="list-style-type: none"> <li>• <i>Developing the S1 Evolution topic</i></li> </ul>
2	Information to parents/consent	<ul style="list-style-type: none"> <li>• <i>A letter and consent form will be sent to parents</i></li> </ul>
3	Staff/participant ratios	<ul style="list-style-type: none"> <li>• <i>Ratio of 1:10</i></li> <li>• <i>List of staff to be prepared by Mrs McIntyre</i></li> <li>• <i>Museum staff also available</i></li> <li>• <i>Mrs McIntyre will provide assistance for special needs pupils as required</i></li> <li>• <i>Each staff member will have a list of their group</i></li> </ul>
4	Venue	<ul style="list-style-type: none"> <li>• <i>Venue provisionally booked for March 3<sup>rd</sup> see letter in file.</i></li> </ul>
5	Travel/Transport	<ul style="list-style-type: none"> <li>• <i>McBlaynes coaches provisionally booked see letter in file.</i></li> <li>• <i>McBlaynes 01234-987654</i></li> <li>• <i>No comfort stop issues - short journey</i></li> <li>• <i>Staff will be responsible for counting their group on the bus</i></li> <li>• <i>Mrs McIntyre will do a full head count before each bus leaves the museum</i></li> </ul>
6	Participants	<ul style="list-style-type: none"> <li>• <i>S1 will be covering this topic in science before the excursion.</i></li> <li>• <i>The excursion will cost £5 (school to assist as necessary - Mrs McIntyre to arrange)</i></li> <li>• <i>School uniform to be worn</i></li> </ul>
8	Equipment required	<ul style="list-style-type: none"> <li>• <i>Science notebooks for all pupils</i></li> <li>• <i>First Aid kit to be taken</i></li> </ul>
9	Managing the activity	<ul style="list-style-type: none"> <li>• <i>Pupils working in small groups under supervision on project work after lecture.</i></li> <li>• <i>All groups will meet at 1pm by museum entrance.</i></li> </ul>
10	Medical needs	<ul style="list-style-type: none"> <li>• <i>Printout list of S1 pupils from school information</i></li> <li>• <i>Miss Fraser to check medicines required and share with staff</i></li> <li>• <i>Group leaders will ensure they have any medication for their group members</i></li> </ul>
11	Weather	<ul style="list-style-type: none"> <li>• <i>Unlikely to be an issue for journey</i></li> <li>• <i>Decision to be made on day by Mrs McIntyre</i></li> </ul>
12	First Aid provision	<ul style="list-style-type: none"> <li>• <i>First Aid available at the venue</i></li> <li>• <i>Mr Morton is First Aid qualified</i></li> <li>• <i>First Aid kit will be taken</i></li> </ul>
13	Emergency procedures	<ul style="list-style-type: none"> <li>• <i>The list of participants will be left in the school office.</i></li> <li>• <i>Mrs McIntyre will carry a mobile and contact the school office if necessary.</i></li> <li>• <i>The office has been instructed to contact the Head of Establishment if help is needed.</i></li> </ul>

ITEMS TO BE PLANNED		• Typical examples of detail to be provided
14	External provider (if applicable)	<ul style="list-style-type: none"> <li>• <i>National Museum</i></li> <li>• <i>School staff present at all times</i></li> <li>• <i>No need to check insurance for this venue</i></li> </ul>
15	Risk Assessment completed	<ul style="list-style-type: none"> <li>• <i>Risk Assessment has been completed</i></li> <li>• <i>Behaviour and supervision will discussed with pupils</i></li> <li>• <i>Risk Assessment will be reviewed after excursion if necessary</i></li> </ul>

I confirm that satisfactory planning and preparation has taken place for this excursion.

I have checked that all reasonable steps have been taken to ensure the safety and wellbeing of participants.

<b>Day Excursion approved by Head of Establishment</b>	<i>S. Taggart</i> <b>Signature</b>	<i>15.1.13</i> <b>Date</b>
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## TEMPLATE – RISK ASSESSMENT – DAY EXCURSION

DESCRIPTION OF TASK / ACTIVITY		Generic Risk Assessment for Day Excursions <b>This is a generic risk assessment identifying typical hazards and control measures. The establishment should ensure a specific risk assessment is carried out for each Day Excursion</b>					
LOCATION							
Item	What are the hazards?	Who might be harmed? And how?	What are you already doing, i.e. what Control Measures are already in place?	Do you need to do anything else to manage this risk?	Action by whom?	Action by when?	Done
1	Transporting group members by vehicle (list specific hazards here)	Group members	Adequate staff ratio Set clear procedures for behaviour on transport Monitor driving standards				
2	Walking to venue (list specific hazards here)	Group members	Adequate staff ratio Ensure staff are familiar with the route Set clear procedures for walking as a group Identify and manage crossing roads				
3	At the venue (list specific hazards here)	Group members	Adequate staff ratio Have prior knowledge of the venue if possible Carry out a dynamic risk assessment Identify suitable supervision techniques Have a Plan B available				
4	Adverse weather (list specific hazards here)	Group members	Obtain weather forecast if necessary Issue clothing advice and check before excursion Carry spare clothing when necessary Have a Plan B available				
5	External provider (list specific hazards here)	Group members	Qualified to carry out the activity Insured to carry out the activity Has provided detailed and suitable programme				
6	Emergencies	Group members	List of participants left at establishment List of participants carried by all staff Medical details and medicines carried Mobile phone carried				
Prepared by:					Date:		
					Date for review:		
Checked and Approved by:					Date:		

## EXAMPLE - RISK ASSESSMENT – Day Excursion

<b>DESCRIPTION OF TASK / ACTIVITY</b>		<b>S1 off-site excursion</b>					
<b>LOCATION</b>		<b>National Museum of Scotland</b>					
Item	What are the hazards?	Who might be harmed? And how?	What are you already doing, i.e. what Control Measures are already in place?	Do you need to do anything else to manage this risk?	Action by whom?	Action by when?	Done
1	<b>Transporting group</b> members by vehicle  Managing large group	Group members	<i>Adequate staff ratio Clear procedures have been set for behaviour on transport Monitor driving standards Contact between coaches by mobile  Head count before leaving establishment and museum</i>				
3	<b>At the venue</b> Stairs Balconies Long passages General public access	Group members	<i>Adequate staff ratio 1:10 Pupils briefed about behaviour/running School staff have prior knowledge of the venue Pupils have been told to stay in groups</i>				
4	<b>Adverse weather</b>	Group members	<i>Obtain weather forecast if necessary Mrs McIntyre to monitor on day</i>				
5	<b>External provider</b> Museum staff unfamiliar with group	Group members	<i>Establishment staff will take part in the session and will be responsible for behaviour etc</i>				
6	<b>Dealing with emergencies</b>	Group members	<i>Experienced staff team List of participants left at establishment List of participants carried by all staff Medical details and medicines carried Mobile phone carried Easy access to emergency services</i>				
<b>Prepared by:</b>		<i>Mrs P McIntyre (Depute)</i>		<b>Date:</b>	9.1.13		
				<b>Date for review:</b>	<i>If used again</i>		
<b>Checked and Approved by:</b>				<b>Date:</b>			

**Sample Primary School**  
**Sample Address**

Dear Parent/Guardian

**Primary 7 trip to the National Museum of Scotland**

As part of our topic this term on Scottish History we have organised an excursion to the **National Museum of Scotland in Edinburgh on Friday 1<sup>st</sup> April 2013.**

Travel will be by coach leaving at 9am and returning at 3pm.

Your child will need to bring a packed lunch and wear school uniform. There will also be an opportunity to visit the museum shop so your child may wish to bring a small amount of money (£5 maximum.)

During the excursion we will initially be exploring the museum in small groups with an identified adult leader but during the afternoon pupils will get the chance to revisit an area of their choice with a partner. A member of staff will be present in all of the areas pupils will be given access to and clear instructions will be given about where to meet.

All aspects of this off-site excursion are covered by Renfrewshire Council's insurance.

You have previously given consent for your child to take part in off-site excursions as an integral part of their curriculum so we will assume consent unless you tell us otherwise. If you have any questions or concerns regarding the excursion please get in touch.

If there is specific medical or personal information that you have not already provided, that might affect your child during the trip, please let us know.

We will assume that the emergency contact details you have previously provided are the ones to use for this trip. If this is not the case please contact the school office.

Yours sincerely

Head of Establishment

## TEMPLATE – Excursion Plan for Residential / Overseas Excursions

This is a generic Excursion Plan. It provides general suggestions for preparing an Excursion Plan.

- It should give sufficient information for the Head of Establishment to approve the excursion.

**RESIDENTIAL EXCURSION TO**  
**DATES**  
**EXCURSION LEADER**

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

ITEMS TO BE PLANNED		• Typical examples of detail to be provided
1	Aims and objectives of excursion	<ul style="list-style-type: none"> <li>• state the aims and objectives of the excursion</li> </ul>
2	Information to parents/consent	<ul style="list-style-type: none"> <li>• provide information letter to parents</li> <li>• gain parental consent in writing</li> <li>• obtain current contact details from parents</li> </ul>
3	Staff/participant ratios	<ul style="list-style-type: none"> <li>• establish any factors affecting the ratio</li> <li>• consider any equality issues</li> <li>• decide on suitable ratio</li> <li>• prepare list of staff on excursion</li> </ul>
4	Travel/transport	<ul style="list-style-type: none"> <li>• mode of travel/transport and supervision arrangements</li> <li>• name and number of transport company</li> <li>• planned comfort stops and supervision arrangements</li> </ul>
5	Accommodation	<ul style="list-style-type: none"> <li>• arrangement/layout of accommodation</li> <li>• overnight supervision and security</li> <li>• fire evacuation procedures</li> <li>• security of any money and valuables</li> </ul>
6	Programme	<ul style="list-style-type: none"> <li>• provide detailed programme</li> <li>• details of supervision arrangements</li> </ul>
7	External provider (if applicable)	<ul style="list-style-type: none"> <li>• ATOL and ABTA approved</li> <li>• discuss programme to be supplied</li> <li>• establish clear handover times and procedures</li> <li>• ensure participants' wellbeing during activity</li> <li>• ensure external provider has Risk Assessments</li> <li>• check provider's insurance</li> </ul>
8	Insurance	<ul style="list-style-type: none"> <li>• check excursion is covered by Employers insurance</li> <li>• check external providers hold adequate insurance</li> </ul>
9	Participants	<ul style="list-style-type: none"> <li>• hold a meeting for participants</li> <li>• hold a meeting for parents</li> <li>• carry out training/preparatory work</li> <li>• collect money</li> <li>• issue clothing advice</li> <li>• discuss behaviour, supervision, risks</li> </ul>
10	Equipment required	<ul style="list-style-type: none"> <li>• list and collect equipment for the excursion</li> <li>• carry First Aid kit</li> </ul>
11	Medical needs	<ul style="list-style-type: none"> <li>• gather up-to-date medical details of participants</li> <li>• take list of medical details on excursion</li> <li>• carry medicines as required</li> </ul>
12	Weather	<ul style="list-style-type: none"> <li>• travel risks</li> <li>• obtain forecast close to excursion date</li> <li>• discuss severe weather alternative with Head of Establishment if necessary</li> <li>• change plans if necessary</li> </ul>
13	First Aid provision	<ul style="list-style-type: none"> <li>• establish if First Aid is available at the venue</li> <li>• decide if First Aid qualification is needed</li> <li>• carry First Aid kit</li> </ul>
14	Emergency procedures	<ul style="list-style-type: none"> <li>• leave list of participants at establishment</li> <li>• arrange 24/7 contact person to be available at base</li> <li>• carry list of participants on excursion</li> </ul>
15	Risk Assessment completed	<ul style="list-style-type: none"> <li>• consult employer's generic Risk Assessment</li> <li>• prepare specific Risk Assessment for excursion (only those</li> </ul>



		elements you are responsible for) <ul style="list-style-type: none"> <li>• discuss risks with staff and participants</li> <li>• review Risk Assessment after excursion if necessary</li> </ul>
	Add further items as required  Examples:-  Foreign and Commonwealth Office (FCO) guidance for the country to be visited.  Local codes and customs, practices and procedures.  Dealing with special medical conditions when overseas  Language  Vaccinations  Parental consent (including requirements for care orders and wards of court, separated parents etc) Food and drink (safety of tap water)  EU Health Insurance Card (EHIC)  Location of British Embassy or Consulate  Contact numbers for emergency services overseas  Procedures for exchange visits  Vetting Host Families	<ul style="list-style-type: none"> <li>• List details for specific activity</li> </ul>

I confirm that satisfactory planning and preparation has taken place for this excursion. I have checked that all reasonable steps have been taken to ensure the safety and wellbeing of participants.

<b>Residential Excursion approved by Head of Establishment</b>	<b>Signature</b>	<b>Date</b>
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## Example - Excursion Plan for Residential / Overseas Excursions

This is a specific Excursion Plan. It provides an example of how an actual Excursion Plan might be prepared.

- It should give sufficient information for the Head of Establishment to approve the excursion.
- It should give sufficient information for the Local Authority to approve the excursion.

**NAME OF ESTABLISHMENT**  
**RESIDENTIAL EXCURSION TO**  
**DATES**  
**EXCURSION LEADER**

**Sample Primary**  
**York**  
**1<sup>st</sup> – 3rd May 2013**  
**Mr James**

ITEMS TO BE PLANNED		<ul style="list-style-type: none"> <li>• Typical examples of detail to be provided</li> </ul>
1	Aims and objectives of excursion	Expand on knowledge about historical project
2	Information to parents/consent	Mr James will send letter to parents in January and ensure written consent before any money is collected. A parents meeting will be held in Feb. Separate meeting with J...’s parents (ASN) to discuss participation.
3	Staff/participant ratios	Staff numbers will be finalised depending on participation. Mr James, Mr and Mrs Black will all be going and J...’s Mum might attend. Minimum ratio of 1:10
4	Travel/transport	We will be travelling in the establishment minibus and if J... attends he will travel by car with mum. Mr James and Mr Black will drive the minibus – both have relevant licences.
5	Accommodation	Accommodation at Seaview Guest House -see attached information and correspondence.
6	Programme	See attached itinerary
7	External provider (if applicable)	Museum, York Castle, Museum – no need to check insurance or risk assessments
8	Insurance	Residential Excursion covered by Council’s insurance
9	Participants	Participants are all involved in history project. They have drawn up their own code of conduct for the trip and signed it. A kit list will be provided by Mr James in April.
10	Equipment required	Mr James will collect the residential first aid kit from the main office prior to departure. Mrs Black will take games and resources for evening activities.
11	Medical needs	Up to date medical information will be obtained on the consent form. Mr Black will be in charge of any medication J....’s mum will look after his needs if he attends
12	Weather	We will obtain forecast close to excursion date and if there are any travel risks we will discuss severe weather alternative with Mrs Fraser.
13	First Aid provision	Mr James has a valid first aid certificate.
14	Emergency procedures	Mrs Fraser will be the emergency contact A list of all participants and the excursion plan will be left with her and in the main office
15	Risk Assessment completed	See attached risk assessment

I confirm that satisfactory planning and preparation has taken place for this excursion. I have checked that all reasonable steps have been taken to ensure the safety and wellbeing of participants.

<b>Residential Excursion approved by Head of Establishment</b>	<b>Signature</b>	<b>Date</b>
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## Template - RISK ASSESSMENT for “Residential / Over Seas Excursions”

DESCRIPTION OF TASK / ACTIVITY		Generic Risk Assessment for Residential Excursions This is a generic risk assessment identifying typical hazards and control measures. Excursion Leaders should add specific details relevant to each residential excursion.					
LOCATION							
Item	What are the hazards?	Who might be harmed? And how?	What are you already doing, i.e. what Control Measures are already in place?	Do you need to do anything else to manage this risk?	Action by whom?	Action by when?	Done
1	Transporting group members <ul style="list-style-type: none"> <li>Getting on/off transport</li> <li>Behaviour</li> <li>Rest breaks</li> <li>Driver behaviour if applicable</li> </ul>	Group members	Ensure: <ul style="list-style-type: none"> <li>Adequate staff ratio</li> <li>Getting on/off transport is supervised</li> <li>Clear procedures for behaviour</li> <li>Rest breaks are supervised</li> <li>Regular head counts are carried out</li> <li>Driving standards are safe at all times</li> </ul>				
2	In the accommodation: <ul style="list-style-type: none"> <li>Fire</li> <li>Safety overnight</li> <li>Unsuitable accommodation</li> <li>“Free time”</li> <li>Security of possessions</li> </ul>	Group members	Ensure: <ul style="list-style-type: none"> <li>Adequate staff ratio</li> <li>Dynamic risk assessment is carried out</li> <li>Fire procedures are adequate</li> <li>Fire practice is carried out</li> <li>There is suitable gender segregation</li> <li>Adequate supervision arrangements exist</li> <li>Group will be safe and secure overnight</li> <li>Belongings will be secure</li> <li>Brief the group</li> </ul>				
3	Around the residential venue <ul style="list-style-type: none"> <li>Traffic</li> <li>“Free time”</li> <li>Other hazards (identify them in Excursion Plan)</li> </ul>	Group members	Ensure: <ul style="list-style-type: none"> <li>Prior knowledge of the venue if possible</li> <li>Adequate staff ratio</li> <li>Dynamic risk assessment is carried out</li> <li>Assess any dangers from traffic/roads</li> <li>Behaviour code explained to group</li> <li>Identify suitable supervision techniques</li> <li>Brief the group</li> </ul>				

4a	Programme activities led by external provider <ul style="list-style-type: none"> <li>Risk Assessments are the provider's responsibility.</li> </ul>	Group members	Ensure: Suitable programme has been agreed <ul style="list-style-type: none"> <li>Provider is aware of any medical issues</li> <li>Provider will look after the welfare of group</li> <li>Clear hand-over at start/finish of sessions</li> <li>Provider is insured</li> </ul>				
4b	Programme activities led by establishment staff <ul style="list-style-type: none"> <li>Plan not clear to all staff</li> <li>Supervision arrangements not clear</li> <li>Risks not assessed</li> </ul>	Group members	Ensure: Dynamic risk assessment carried out <ul style="list-style-type: none"> <li>Clear plan for session exists</li> <li>All staff are able to carry out allocated tasks</li> <li>Supervision arrangements are established</li> <li>Behaviour code explained to group</li> <li>Meeting times/places clearly established</li> <li>Group briefed for session</li> </ul>				
5	Adverse weather <ul style="list-style-type: none"> <li>Effect on transport</li> <li>Effect on programme</li> </ul>	Group members	Transport: <ul style="list-style-type: none"> <li>Obtain weather forecast if necessary</li> <li>Carry out dynamic risk assessment</li> <li>Consider effect of weather on travel</li> <li>Abandon excursion if weather too extreme</li> </ul> Programme: <ul style="list-style-type: none"> <li>Issue clothing advice and</li> <li>Check group clothing if necessary</li> <li>Carry spare clothing when necessary</li> <li>Have a Plan B available for programme</li> </ul>				
6	Emergencies <ul style="list-style-type: none"> <li>Need to obtain outside assistance</li> <li>Need to contact home establishment</li> <li>Need for information on group members</li> <li>Need to contact parents</li> </ul>	Group members	Senior Officer at home establishment: <ul style="list-style-type: none"> <li>Provides 24/7 contact</li> <li>Holds list of participants</li> <li>Holds parent contact numbers</li> </ul> Staff on excursion: <ul style="list-style-type: none"> <li>Hold list of participants</li> <li>Hold parent contact numbers</li> <li>Hold medical details</li> <li>Medicines available to appropriate people</li> <li>Carry mobile phones</li> </ul>				
Prepared by:					Date:		
					Date for review:		
Checked and Approved by:					Date:		

## EXAMPLE - RISK ASSESSMENT for “Residential / Over Seas Excursions”

DESCRIPTION OF TASK / ACTIVITY		S2 Residential cultural / music trip					
LOCATION		Sample location					
Item	What are the hazards?	Who might be harmed? And how?	What are you already doing, i.e. what Control Measures are already in place?	Do you need to do anything else to manage this risk?	Action by whom?	Action by when?	Done
1	Transporting group members <ul style="list-style-type: none"> <li>Getting on/off transport</li> <li>Behaviour</li> <li>Rest breaks</li> <li>Driver behaviour if applicable</li> </ul>	Group members	Ensure: <ul style="list-style-type: none"> <li>Adequate staff ratio</li> <li>Getting on/off transport is supervised</li> <li>Clear procedures for behaviour</li> <li>Rest breaks are supervised</li> <li>Regular head counts are carried out</li> <li>Driving standards are safe at all times</li> </ul>	<i>Issue staff with group list to assist with head count at service station</i>	tbc	tbc	
2	In the accommodation: <ul style="list-style-type: none"> <li>Fire</li> <li>Safety overnight</li> <li>Unsuitable accommodation</li> <li>“Free time”</li> <li>Security of possessions</li> </ul>	Group members	Ensure: <ul style="list-style-type: none"> <li>Adequate staff ratio</li> <li>Dynamic risk assessment is carried out</li> <li>Fire procedures are adequate</li> <li>Fire practice is carried out</li> <li>There is suitable gender segregation</li> <li>Adequate supervision arrangements exist</li> <li>Group will be safe and secure overnight</li> <li>Belongings will be secure</li> <li>Brief the group</li> </ul>	<i>Check with accommodation that disabled room provided can be adequately supervised by staff</i>	tbc	tbc	
3	Around the residential venue <ul style="list-style-type: none"> <li>Traffic</li> <li>“Free time”</li> <li>Other hazards (identify them in Excursion Plan)</li> </ul>	Group members	Ensure: <ul style="list-style-type: none"> <li>Prior knowledge of the venue if possible</li> <li>Adequate staff ratio</li> <li>Dynamic risk assessment is carried out</li> <li>Assess any dangers from traffic/roads</li> <li>Behaviour code explained to group</li> <li>Identify suitable supervision techniques</li> <li>Brief the group</li> </ul>	<i>Meet with pupils to establish behaviour code</i> <i>On arrival pupils will be shown areas they may/may not use</i>	tbc		
4a	Programme activities led by external provider <ul style="list-style-type: none"> <li>Risk Assessments are the provider's responsibility.</li> </ul>	Group members	Ensure: <ul style="list-style-type: none"> <li>Suitable programme has been agreed</li> <li>Provider is aware of any medical issues</li> <li>Provider will look after the welfare of group</li> </ul>				

DESCRIPTION OF TASK / ACTIVITY		S2 Residential cultural / music trip					
			<ul style="list-style-type: none"> <li>Clear hand-over at start/finish of sessions</li> <li>Provider is insured</li> </ul>				
4b	Programme activities led by establishment staff <ul style="list-style-type: none"> <li>Plan not clear to all staff</li> <li>Supervision arrangements not clear</li> <li>Risks not assessed</li> </ul>	Group members	Ensure: <ul style="list-style-type: none"> <li>Dynamic risk assessment carried out</li> <li>Clear plan for session exists</li> <li>All staff are able to carry out allocated tasks</li> <li>Supervision arrangements are established</li> <li>Behaviour code explained to group</li> <li>Meeting times/places clearly established</li> <li>Group briefed for session</li> </ul>	<i>Group leaders to be issued with group list for concert and cinema.</i>  <i>Group meeting each morning to explain plans for the day.</i>			
5	Adverse weather <ul style="list-style-type: none"> <li>Effect on transport</li> <li>Effect on programme</li> </ul>	Group members	Transport: <ul style="list-style-type: none"> <li>Obtain weather forecast if necessary</li> <li>Carry out dynamic risk assessment</li> <li>Consider effect of weather on travel</li> <li>Abandon excursion if weather too extreme</li> </ul> Programme: <ul style="list-style-type: none"> <li>Issue clothing advice and</li> <li>Check group clothing if necessary</li> <li>Carry spare clothing when necessary</li> <li>Have a Plan B available for programme</li> </ul>	<i>Mrs James will check forecast on the morning of departure and raise any concerns with Headteacher.</i>	Mrs James		
6	Emergencies <ul style="list-style-type: none"> <li>Need to obtain outside assistance</li> <li>Need to contact home establishment</li> <li>Need for information on group members</li> <li>Need to contact parents</li> </ul>	Group members	Senior Officer at home establishment: <ul style="list-style-type: none"> <li>Provides 24/7 contact</li> <li>Holds list of participants</li> <li>Holds parent contact numbers</li> </ul> Staff on excursion: <ul style="list-style-type: none"> <li>Hold list of participants</li> <li>Hold parent contact numbers</li> <li>Hold medical details</li> <li>Medicines available to appropriate people</li> <li>Carry mobile phones</li> </ul>				
Prepared by:		Mrs James			Date:		
					Date for review:		
Checked and Approved by:					Date:		

## EXAMPLE – PARENTAL/CARER AGREEMENT TO RESIDENTIAL / OVERSEAS EXCURSION

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

1.	Destination/Description of Excursion
2.	Dates and estimated times of: a. Departure ..... b) Return .....
3.	Cost of Excursion (where applicable)
4.	Member of Staff responsible for Excursion
5.	Telephone Numbers – Daytime: Evening: Other:

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### SECTION B – To be returned to school / establishment

Excursion To _____
Surname _____ Forename _____ Class _____
Address _____ _____
Contact Telephone Numbers – Daytime: Evening / Other:
Emergency Contact (Name and Telephone Number):
Relevant Medical Details (e.g. asthma):          
I agree to my son/daughter taking part in the above named excursion.
Signature of Parent/Carer..... Date.....

**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 .....

.....

Please tick **ONE** box and sign.

☐

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 Renfrewshire 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.

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



## **SAMPLE CODE OF CONDUCT**

### **Pupil's Code of Conduct**

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

- normal school / establishment 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 Excursion Leaders reserve the right to send the offending pupil home at the parent/carers' expense**

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

Signed ..... (pupil)

Signed ..... (parent/carer)

Date .....

Return to .....

**SAMPLE EMERGENCY ACTION FORM**

<b>Excursion Leader</b> <b>Ensure this form is available at all times</b>	<b>Warnings and advice</b>
<b>Establishment Base Contact Person/s:</b>	<ul style="list-style-type: none"> <li>• Co-operate fully with emergency services</li> <li>• Do not admit liability</li> <li>• Do not make comment to the media – refer to Renfrewshire Council (07747 485544)</li> <li>• Inform establishment base emergency contact who will ensure Children's Services HQ are aware of the situation</li> <li>• Seek and follow advice from establishment /Children's Services HQ</li> <li>• Do not contact parent/carers establishment / HQ contact will take charge of this.</li> </ul>
<b>Establishment Base Telephone Number(s)</b>	
<b>Out of Hours Emergency Telephone Number:</b>	
<b>Children's Services HQ Emergency Telephone Number:- 07747 485544</b>	
<b>Calls from abroad:</b>	

**SAMPLE DEBRIEF FORM**

EXCURSION TITLE \_\_\_\_\_

EXCURSION DATES \_\_\_\_\_

EXCURSION LEADER \_\_\_\_\_

Action	Action to Take	Date Actioned	Signed
Points to follow up with parents			
Points to follow up with pupils			
Points to follow up with staff			
Lessons for future excursions			
Issues to report to Establishment Head / Manager			
Issues to report to Children's Services HQ			
Other issues to report (i.e. health and safety, child protection)			

Form to be submitted to Head of Establishment for review, ten working days after return of excursion.

Signed \_\_\_\_\_

Date \_\_\_\_\_

Head of Establishment