



Health & Safety on Educational Excursions



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Introduction



1. Participants can derive a good deal of educational benefit from taking part in excursions organised under the auspices of their local authority, especially through schools. In particular, they have the opportunity to undergo experiences not available in the classroom or other learning environment. Visits help to develop a participant's investigative skills and longer visits in particular encourage greater independence. This guidance is designed to help all those involved in organising educational excursions to ensure that those taking part stay safe and healthy. It is directed towards staff in schools; those leading community education groups; social services staff; countryside rangers; leisure and recreation staff; sports development staff, and similar activity co-ordinators who may be involved in organising and leading educational excursions. The guidance may also be useful to staff in the further and higher education sectors who may be involved in organising and leading similar excursions.
2. The guidance does not seek to replace local or other professional guidance or regulations. Where appropriate, local authorities should be the first source of advice. The booklet offers national guidance where guidance from elsewhere may be unavailable, incomplete or not up to date. It is based on material prepared by the Department for Education and Skills following wide consultation and reflects and collates existing good practice.
3. Most educational excursions take place without incident and it is clear that excursion leaders are already demonstrating a high level of safety awareness. But, following a number of tragic incidents involving young people, there is a continuing concern amongst local authority staff and parents to continue to improve safety on excursions. The potential hazards which the booklet refers to should not discourage excursion organisers. No amount of planning can guarantee that a visit will be totally incident free, but good planning and attention to safety measures can reduce the number of accidents and lessen the seriousness of those that do happen. The management of health and safety on excursions is part of any establishment's overall policy on health and safety. The guidance sets out principles, rather than trying to cover every eventuality, leaving it to leaders' professional and local judgement how to apply those principles.



4. This guidance supersedes the Department's Circular 10/94 *Safety in Outdoor Activity Centres: Guidance*.
5. The booklet does not cover work experience, which is treated in separate guidance (see Annex A for details). References to 'parents' cover anyone who has parental responsibility.
6. This guidance should not be taken as an authoritative interpretation of the law. That is for the courts.
7. Crown copyright. This booklet is produced by the Scottish Executive Education Department and draws heavily from the booklet *Health and Safety of Pupils on Educational Visits* produced in 1998 by the Department for Education and Skills. Extracts, including the model forms in Chapter 11, may be reproduced for non-commercial education or training purposes on condition that the source is acknowledged.
8. This guidance and its three supplements *Standards for Local Authorities in Overseeing Educational Excursions*, *Standards for Adventure*, and *A Handbook for Group Leaders* are available to print and download from www.scotland.gov.uk and www.parentzonescotland.gov.uk. Further printed copies of this guidance and the supplements are available free on request from the Scottish Executive Education Department, Schools Division, Victoria Quay, Edinburgh, EH6 6QQ, telephone 0131 244 0943.

Responsibilities for excursions



Legal framework

9. Under the Health and Safety at Work etc Act 1974 employers are responsible for the health, safety and welfare at work of their employees. Employers are also under a duty to ensure, so far as is reasonably practicable, the health and safety of anyone else on the premises or anyone who may be affected by their activities. This includes participants in off-site visits.
10. Employers are the local authority in most establishments which may be organising educational excursions. The owner, governors or trustees are the employers in independent schools.
11. The Management of Health and Safety at Work Regulations 1999, made under the 1974 Act, require employers to:
 - assess the risks of activities. See **Risk assessment** in Chapter 2 paragraphs 35 – 44;
 - introduce measures to control those risks;
 - tell their employees about these measures.

Also under the Health and Safety legislation employees must:

- take reasonable care of their own and others' health and safety;
 - co-operate with their employers over safety matters;
 - carry out activities in accordance with training and instructions;
 - inform the employer of any serious risks.
12. These duties apply to all educational excursions. Teachers and other staff in charge of pupils also have a common law duty to act as any reasonably prudent parent would do in the same circumstances.



Approval for excursions

13. Employers should have a written procedure for arranging excursions which leaders should follow. This will normally include procedures for the approval of certain categories of excursion.
14. Although the employer is responsible for health and safety, decisions about excursions are, in some circumstances, delegated to the head of the establishment. The head of establishment's agreement must be obtained before a visit takes place.
15. See Chapter 11 Model form 1 for an approval application.

Local authorities

16. Local authorities have the following main roles:
 - provide written guidelines for heads of establishments and excursion leaders including advice on risk assessment;
 - provide access to technical advice where necessary;
 - assess proposals for certain categories of excursion;
 - 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;
 - have in place procedures to monitor and review safety during off-site excursions and activities.

Employers in other educational establishments

17. In the independent and non-local authority sectors, the employer's role will be the same as that suggested for a local authority above. They should satisfy themselves that the risk assessment has been carried out, that appropriate safety measures are in place and that training needs have been addressed.
18. They should:
 - ensure that the excursion has a specific and stated objective;
 - ensure that the head of establishment/group leader shows how their plans comply with regulations and guidelines, including the establishment's health and safety policy document, and that the head of establishment/group leader reports back after the excursion;
 - ensure that they are informed about less routine excursions well in advance;
 - assess proposals for certain categories of excursion, which should include excursions involving an overnight stay or travel outside the UK.

Head of establishment

19. Heads of establishments should ensure that excursions comply with regulations and guidelines provided by the local authority or other employer, and the authority's or establishment's own health and safety policy. Heads of establishments should ensure that the group leader is competent to manage and monitor the risks throughout the visit.
20. Heads of establishments should be clear about their role if taking part in the visit as a group member/supervisor. They should follow the instructions of the group leader who will have sole charge of the visit.
21. Heads of establishments should ensure that:
 - the excursion has suitable educational aims and effective ways of achieving them;
 - adequate child protection procedures are in place;
 - all necessary actions have been completed before the excursion begins;
 - a written risk assessment has been completed and appropriate safety measures are in place;
 - training needs have been assessed by a competent person and the needs of the staff and participants have been considered;
 - the group leader has experience in supervising the age groups going on the excursion and will organise the group effectively;
 - the group leader or another person is suitably competent to instruct the activity and has suitable knowledge of the location/centre where the activity will take place. See **Establishment-led adventure activities** in Chapter 8 paragraphs 167 – 169;
 - group leaders are allowed sufficient time to organise excursions properly;
 - non-teacher supervisors on the excursion are appropriate people to supervise children. See **Vetting suitability** in Chapter 3 paragraphs 65 – 74;
 - any instruction provided by a third party is undertaken by a suitably competent person;
 - ratio of supervisors to participants is appropriate. See **Ratios** in Chapter 3 paragraphs 59 – 62;
 - the local authority or other employer has approved the excursion, if appropriate;
 - appropriate consent forms have been signed;
 - arrangements have been made for the medical needs and additional support needs of all the participants;
 - the local authority policy on the administration of medicines has been followed;
 - adequate first aid provision will be available;
 - the mode of travel is appropriate;
 - travel times out and back are known including pick-up and drop-off points;
 - there is adequate and relevant insurance cover. See Chapter 7 **Insurance**;



- they have the address and phone number of the excursion's venue and have a contact name;
- a home base contact has been nominated (this may be the head of establishment) and the group leader has details;
- the group leader, group supervisors and nominated home base contact have a copy of the agreed emergency procedures and know how to activate them;
- the group leader, group supervisors and nominated home base contact have the names of all the leaders and participants travelling in the group, and the contact details of parents' and leaders' next of kin;
- there is a contingency plan for any delays including a late return home.

Group leader

22. One person, the group leader, should have overall responsibility for the supervision and conduct of the excursion and should have regard to the health and safety of the group. The group leader should have been appointed or approved by the head of establishment. The group leader should:
- obtain the head of establishment's prior agreement before any off-site excursion takes place;
 - follow local authority regulations, guidelines and policies;
 - appoint a deputy where appropriate;
 - clearly define each group supervisor's role and ensure all tasks have been assigned;
 - be able to control and lead participants of the relevant age range;
 - be suitably competent to instruct participants in an activity and be familiar with the location/centre where the activity will take place. See **Establishment-led adventure activities** in Chapter 8 paragraphs 167 – 169;
 - be trained in child protection issues;
 - ensure that adequate first aid provision will be available;
 - undertake and complete the planning and preparation of the excursion including the briefing of group members and parents;
 - ensure a comprehensive risk assessment is in place. See **Risk assessment** in Chapter 2 paragraphs 35 – 44;
 - review regularly undertaken excursions/activities and advise the head of establishment where adjustments may be necessary;
 - ensure that all supervisors are fully aware of what the proposed visit involves;
 - have enough information on the participants proposed for the excursion to assess their suitability or be satisfied that their suitability has been assessed and confirmed;
 - ensure the ratio of supervisors to participants is appropriate for the needs of the group. See **Ratios** in Chapter 3 paragraphs 59 – 62.

- consider stopping the excursion if the risk to the health or safety of the participants is unacceptable, and have in place procedures for such an eventuality;
- ensure that group supervisors have details of the home base contact;
- ensure that group supervisors and the home base contact have a copy of the emergency procedures and know how to activate them;
- ensure that group supervisors have the details of participants' additional support or medical needs which will be necessary for them to carry out their tasks effectively;
- observe the guidance set out for supervisors and other adults below.

Other paid staff

- 23.** Other paid staff on establishment-led excursions act as employees of the local authority (or managers of non-local authority establishments such as independent schools), whether the excursion takes place within normal establishment hours or outside those hours, by agreement with the head of establishment (or managers of non-local authority establishments).
- 24.** Such staff must do their best to ensure the health and safety of everyone in the group and act as any reasonable parent would do in the same circumstances. They should:
- follow the instructions of the group leader and help with control and discipline;
 - consider stopping the excursion or the activity, notifying the group leader, if they think the risk to the health or safety of the participants in their charge is unacceptable.

Adult volunteers

- 25.** Adult volunteers on the excursion should be clear about their roles and responsibilities during the excursion. Adult volunteers acting as supervisors must:
- do their best to ensure the health and safety of everyone in the group;
 - not be left in sole charge of participants except where it has been previously agreed as part of the risk assessment;
 - follow the instructions of the group leader and group supervisors and help with control and discipline;
 - speak to the group leader or group supervisors if concerned about the health or safety of participants at any time during the excursion.

Responsibilities of participants

- 26.** The group leader should make it clear to participants that they must:
- not take unnecessary risks;
 - follow the instructions of the leader and other supervisors including those at the venue of the excursion;
 - dress and behave sensibly and responsibly;



- if abroad be sensitive to local codes and customs;
 - look out for anything that might hurt or threaten themselves or anyone in the group and tell the group leader or supervisor about it.
- 27.** Any participants whose behaviour may be considered to be inappropriate or a danger to themselves or to the group may be stopped from going on the excursion. The curricular aims of the excursion for these participants should be fulfilled in other ways wherever possible.

Parents

- 28.** Parents should be able to make an informed decision on whether their child should go on the excursion. The group leader should ensure that parents are given sufficient information in writing and are invited to any briefing sessions.
- 29.** The group leader should also tell parents how they can help prepare their child for the excursion by, for example, reinforcing the excursion's code of conduct. Parents should also be asked to agree the arrangements for sending a participant home early and, if necessary, who will meet the cost.
- 30.** Special arrangements may be necessary for parents for whom English is not their first language.
- 31.** Parents will need to:
- provide the group leader with emergency contact number(s);
 - sign the consent form (see Model form 7 in Chapter 11);
 - give the group leader information about their child's emotional, psychological and physical health which might be relevant to the visit (usually by means of the consent form).
- 32.** See Chapter 5 **Communicating with parents**. For **Tour operators** see Chapter 9 paragraphs 196 – 198.

Chapter 2

Planning excursions



Planning

33. Whether the excursion is to a local park, museum or swimming pool, or includes a residential stay in the UK or abroad, it is essential that formal planning takes place, and begins sufficiently in advance of departure. This involves considering the dangers and difficulties which may arise and making plans to reduce them. In practice, the head of establishment – who is responsible for planning excursions – will often delegate the detailed planning to the organiser of the excursion or the group leader. Heads of establishments must satisfy themselves that the person planning the excursion is competent to do so and has the necessary relevant experience or access to an appropriate technical adviser.
34. Many local authorities have detailed guidance on excursions, including risk assessment, which establishments must follow. For residential visits at home or abroad, or for potentially hazardous activities and/or environments, some local authorities require establishments to obtain the authority's approval before the excursion takes place.

Risk assessment

35. In practice, risk assessments, which employers are legally required to do (see **Legal framework** in Chapter 1 paragraphs 9 – 12), are usually carried out by the group leader. A written assessment should be completed well before the excursion, and should be made available for inspection by the head of establishment or local authority as appropriate.
36. A written risk assessment for an excursion need not be complex but it should be comprehensive. It does not generally require technical formulae or professional health and safety expertise. However, specialised information for some excursions may be necessary and heads of establishments should ensure that the person assessing the risks is competent to do so.



- 37.** A formal assessment of the foreseeable risks that might be met on an excursion should have the aims of preventing the risks or reducing them. Participants must not be placed in situations which expose them to an unreasonable level of risk. Safety must always be the prime consideration. If the risks cannot be contained, or the programme modified, then the excursion must not take place.
- 38.** The risk assessment should be based on the following considerations:

 - what are the hazards?
 - who might be affected by them?
 - what safety measures need to be in place to reduce risks to a reasonable level?
 - can the group leader ensure that the safety measures in place are adhered to?
 - can an assessment of the effectiveness of the safety measures and any proposed changes be made?
 - what steps will be taken in an emergency?
- 39.** The person carrying out the risk assessment should record it and give copies to all leaders and supervisors on the excursion, with details of the measures they should take to avoid or reduce the risks. Depending on the category of excursion and local authority approval arrangements, local authorities and heads of establishments should also be given a copy so that approval, as necessary, can be given with a clear understanding that effective planning and risk assessment has taken place.
- 40.** Frequent excursions to local venues such as swimming pools may not need a risk assessment every time. Nevertheless it is essential not to become complacent. A generic assessment of the risks of such excursions should be made at regular intervals, and careful monitoring should take place.
- 41.** The group leader and other supervisors should monitor the risks throughout the excursion and take appropriate action as necessary.
- 42.** Before booking an excursion with an external provider the group leader should obtain a written or documentary assurance that providers have themselves assessed the risks and have appropriate safety measures in place.
- 43.** Detailed advice on risk assessment can be obtained from the local authority's health and safety officer. In addition, the Health and Safety Executive has published two booklets entitled *Five Steps to Risk Assessment* and *Five Steps to Risk Assessment in Adventure Activity Centres*. See Annexes A & B for details and Model forms 3 and 4 in Chapter 11 for a basic risk assessment format.
- 44.** The group leader should take the following factors into consideration when assessing the risks:

 - the type of excursion/activity and the level at which it is being undertaken;
 - the location, routes and modes of transport;
 - the competence, experience and qualifications of supervisory staff;

- the composition of the group, including the role of supervisors whose own children may be participants;
- the ratios of supervisory staff to participants;
- the group members' age, competence, fitness and temperament and the suitability of the activity;
- the additional support or medical needs of participants;
- the quality and suitability of available equipment;
- seasonal conditions, weather and timing;
- emergency procedures;
- how to cope when a participant becomes unable or unwilling to continue;
- the need to monitor the risks throughout the excursion.

Exploratory visit

45. Wherever possible, the group leader should undertake an exploratory visit to:

- ensure at first hand that the venue is suitable to meet the aims and objectives of the excursion;
- assess potential areas and levels of risk;
- ensure that the venue can cater for the needs of the staff and participants in the group;
- become familiar with the area before taking a group there.

If the excursion is to a residential centre, group leaders may additionally wish to:

- obtain names and addresses of other establishments who have used the venue;
- obtain advice from the manager of the residential centre;
- view the organisation's Operating Procedures Document, risk assessment documentation, health and safety policy and insurance cover.

46. If, in the last resort, an exploratory visit is not feasible then the group leader will need to consider how to complete an adequate assessment of the risks. A minimum measure would be to obtain specific information by letter from the venue, from other users who have recently visited it, and from local organisations such as tourist boards.

47. Detailed advice on particular categories of excursions which carry specific risks is provided in Chapters 8 **Types of visit** and 9 **Visits abroad**. Advice may also be sought from the local authority and from specialist bodies listed at Annex B.

48. Many establishments will take new groups to the same location each year. As some factors will change from year to year, it is prudent to re-assess the risks each time – even when the group leader stays the same. It may be useful to evaluate each completed excursion and keep a record. Model form 5 in Chapter 11 provides a suggested format.



Other considerations

- 49.** Other factors which should form part of the planning stage include:
- the facilities/equipment the group will need to take on the visit;
 - the facilities/equipment to be provided at the venue;
 - staff training needs;
 - the designation of someone to record the details of the excursion and to carry accident forms etc;
 - transport arrangements;
 - insurance arrangements;
 - information to the provider;
 - communication arrangements;
 - supervision ratios;
 - contingency measures for enforced change of plan or late return;
 - information to parents;
 - preparing participants;
 - emergency arrangements;
 - arrangements for sending participants home early.
- 50.** Further information on these issues is provided in subsequent chapters.

Financial planning

- 51.** The group leader should ensure that parents have early written information about the costs of the excursion, how much will come from school or other establishment funds, and how much each parent will be charged or asked to contribute. Parents should be given enough time to prepare financially for the excursion. It may be useful to break the costs down into subheads such as travel, accommodation, meals etc.
- 52.** The head of establishment should ensure that banking arrangements are in place to separate the excursion's receipts from other establishment funds and from private accounts in line with their local authority's financial procedures.
- 53.** The head of establishment/group leader should reach a pre-agreement with parents on whether any funds left surplus after the visit will be returned to parents or retained for another excursion.

First aid

- 54.** First aid should form part of the risk assessment. Before undertaking any off-site activities the head of establishment or the group leader should assess what level of first aid might be needed. For adventure activities, excursions abroad or residential visits it is sensible for at least one of the group's leaders to hold a current and valid first aid certificate. All adults in the group should know how to contact the emergency services.

- 55.** The minimum first aid provision for an excursion is:
- a suitably stocked first aid kit;
 - a person appointed to be in charge of first aid arrangements.

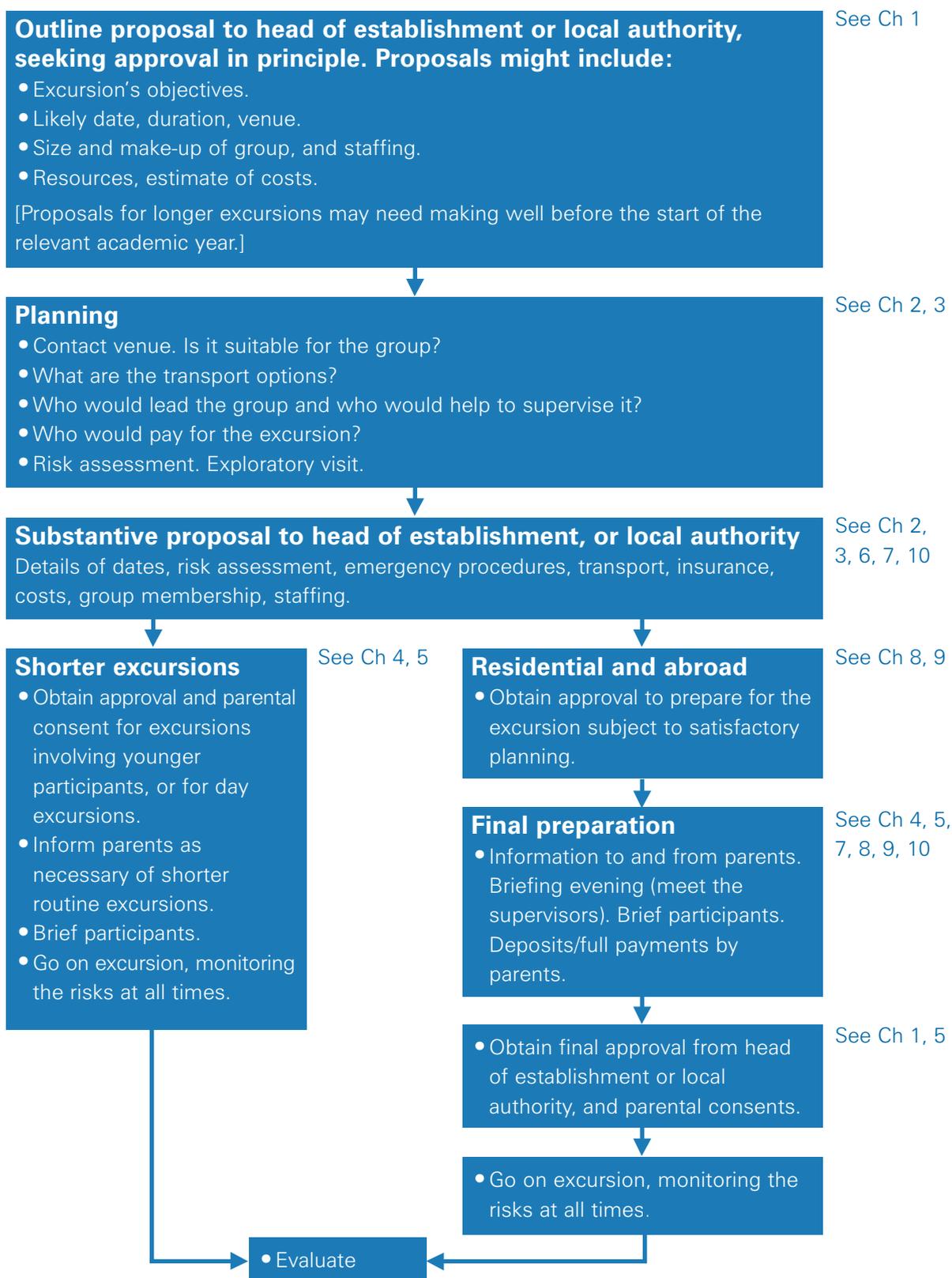
Other considerations when considering first aid needs should include:

- the numbers in the group and the nature of the activity;
 - the likely injuries and how effective first aid would be;
 - the distance to the nearest hospital.
- 56.** First aid should be available and accessible at all times. The Health and Safety Executive recommends the following minimum contents for a travelling first aid kit where no special risk has been identified:
- a leaflet giving general advice on first aid;
 - six individually wrapped sterile adhesive dressings;
 - one large sterile unmedicated wound dressing approximately 18 cm x 18 cm;
 - two triangular bandages;
 - two safety pins;
 - individually wrapped moist cleaning wipes;
 - one pair of disposable gloves;
 - a resuscitator (for hygienic mouth to mouth resuscitation) would also be useful.
- 57.** All minibuses are required by law to carry a first aid kit. See Chapter 6 **Planning transport**.
- 58.** There is the possibility, during an excursion, of the need to clear away clinical waste such as blood, faeces, stained dressings etc. Staff on excursions should be aware of and follow the authority's policy on dealing with clinical waste.



Planning the excursion

This page charts the likely stages of planning an excursion





Ratios

- 59.** It is important to have a suitable ratio of adult supervisors to participants for any excursion. The factors to take into consideration include:
- sex, age and ability of group;
 - those with additional support or medical needs;
 - nature of activities;
 - experience of adults in off-site supervision;
 - duration and nature of the journey;
 - type of any accommodation;
 - competence of staff, both general and on specific activities;
 - requirements of the organisation/location to be visited;
 - competence and behaviour of participants;
 - first aid cover.
- 60.** Some local authorities set their own levels of supervision for off-site excursions, which establishments must adhere to. Staffing ratios for visits are difficult to prescribe as they will vary according to the activity, age group, location and the efficient use of resources. However, for groups of people under 18, adult to participant ratios could be:
- 1 adult to 15-20 group members for excursions where the element of risk to be encountered is similar to that normally encountered in daily life, e.g. excursions to sites of historic interest, most field work, local walks etc;
 - 1 adult to 10 group members for all trips abroad;
 - within each of these categories, schools may want to consider, for example for children under the age of 8 or for children with additional support needs, whether a lower ratio, of 1 adult to 6 (or fewer) group members should apply;
 - for higher risk activities, consideration will need to be given to greater adult supervision, as appropriate.



61. The above are examples only. Group leaders should assess the risks and consider an appropriate safe supervision level for their particular group. There should be a minimum of one leader in charge. For advice on ratios for swimming see Chapter 8, paragraphs 180 and 182. National Governing Bodies for Sport will be able to advise on ratios for adventure activities.
62. In addition to the leader in charge there should be enough supervisors to cope effectively with an emergency. When excursions are to remote areas or involve hazardous activities, the risks may be greater and supervision levels should be set accordingly. The same consideration should be given to excursions abroad (see Chapter 9 paragraph 203) or residential visits (see Chapter 8 paragraph 190). Some non-residential excursions with mixed groups will need a teacher from each sex.

Parents/Volunteers

63. Where there is more than one leader/supervisor a group leader should be appointed who has authority over the whole group. If more than one establishment is involved an overall group leader should be identified, usually the person with the most experience in leading such excursions.
64. Where a high leader:participant ratio is required, it is not always feasible to use establishment staff alone. Parents/volunteers may be used to supplement the supervision ratio. They should be carefully selected and ideally they should be well known to the establishment and the group. Anyone who has not had a criminal conviction check should never be left in sole charge of participants.

Vetting suitability – child protection

65. Education authorities should provide support and advice to assist group leaders to properly assess the potential risks to children on any excursion. Among the potential risks is harm to children from inappropriate conduct by adults or peers that is abusive in any way.
66. Group leaders should make themselves aware of the child protection procedures and contacts within their service and their local authority. Within schools, a designated child protection co-ordinator will be the first point of contact and advice, and within the education service, a senior manager with designated responsibility for child protection. Within all voluntary groups and organisations working with children, it is advisable to have a child protection policy.
67. All staff involved with an excursion should be familiar with the need to prevent child abuse, to understand signs that a child is at risk or has been harmed, and to respond appropriately if he or she has concerns. Bullying may be considered less serious but does cause significant harm and upset to children, particularly when away from home, and prevention and responses to bullying must also be considered.
68. Staff should plan to minimise situations where children are at risk of inappropriate contact with adults, or other children and young people; inappropriate conduct between peers; or situations where children may be at risk of abuse. Staff should also plan for appropriate responses to concerns and systems of communication, support, notification to other services, and record keeping. The guidelines on child protection in education adopted by education authorities will provide information on all of these issues.

69. For the protection of both adults and young people, all adult supervisors should ensure that they are not alone with a young person wherever possible.
70. It may not be necessary that every member of staff is fully trained in child protection or is considered to carry full responsibility for child protection, especially where volunteers are used on an occasional basis. However, a simple information sheet may help to raise awareness and outline contact information for all staff. It is essential that the group leader has received child protection training.
71. It is good practice to discuss clearly and openly with children and their parents prior to any excursion the expectations of behaviour, safety rules and procedures, and contact arrangements should concerns arise.

Vetting suitability – Disclosure Scotland

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

Supervisors' responsibilities

75. All adult supervisors must understand their roles and responsibilities at all times. It may be helpful to put this in writing. In particular, all supervisors should be aware of any participants who may require closer supervision, such as those with additional needs or those likely to cause trouble. Group leaders retain responsibility for the group at all times.



Competences if leading an adventure activity

- 76.** If the establishment is leading an adventure activity, such as canoeing, the local authority must ensure that the group leader and other supervisors are suitably competent to lead or instruct participants in the activity, bearing in mind that some participants may be novices. Competences should be demonstrated by holding the relevant National Governing Body (NGB) award where it exists. Some local authorities have their own procedures for approving the competences/experience of instructors. Such local accreditation schemes should be overseen/managed by an appropriately qualified technical adviser. Where there is no local procedure the relevant NGB can normally advise. Names and addresses of NGBs are at Annex B.

Head counts

- 77.** Whatever the length and nature of the excursion, regular head counting of participants should take place, particularly where there are opportunities for participants to become separated. All supervisors should carry a list of all participants and adults involved in the excursion at all times, preferably on their person. Participants, particularly young children, should be easily identifiable, especially if the excursion is to a densely populated area. Brightly coloured caps, T shirts or a uniform can help identify group members more easily. Participants should not wear name badges. But some establishments find it useful to provide participants with badges displaying the name of the establishment and its emergency contact number. The group leader should establish rendezvous points and tell participants what to do if they become separated from the group.

Remote supervision

- 78.** The aim of excursions for some participants may be to encourage independence and investigative skills, and some of the time on excursions such as trips abroad and fieldwork may be unsupervised. The group leader should establish during the planning stage of the excursion whether the participants are competent in remote supervision and should ensure parents have agreed this part of the excursion. The group leader remains responsible for participants even when not in direct contact with them.
- 79.** Parents should be told, before the excursion, whether any form of remote supervision will take place.
- 80.** See **Preparing participants for remote supervision** in Chapter 4 paragraphs 91 – 92 and for **Remote supervision during adventurous activities** see Chapter 8 paragraphs 171 – 175. For **Supervision on transport** see Chapter 6 paragraphs 123 – 125.

Chapter 4

Preparing participants



General

81. Participants who are involved in an excursion’s planning and organisation, and who are well prepared, will make more informed decisions and will be less at risk. Providing information and guidance to participants is an important part of preparing for an excursion. Participants should clearly understand what is expected of them and what the excursion will entail. Participants must understand what standard of behaviour is expected of them and why rules must be followed. Lack of control and discipline can be a major cause of accidents. Participants should also be told about any potential dangers and how they should act to ensure their own safety and that of others.

82. Participants should also be involved in planning, implementing and evaluating their own contribution to the excursion, including where appropriate, curricular work and have opportunities to take different roles within an activity. This should include considering any health and safety issues.

Participation

83. The group leader should ensure that the participants are capable of undertaking the proposed activity. Participants should be encouraged to take on challenges during adventure activities but should not be coerced into activities of which they have a genuine fear.

84. Participants whose behaviour is such that the group leader is concerned for their safety, or for that of others, should be withdrawn from the activity. On residential visits the group leader should consider whether such participants should be sent home early. Parents and participants should be told in advance of the excursion about the procedures for dealing with misbehaviour, how a participant will be returned home safely and who will meet the cost.



Equal opportunities

- 85.** Every effort should be made to ensure that excursions and activities are available and accessible to all who wish to participate, irrespective of additional support or medical needs, ethnic origin, sex, religion etc. All young people should be encouraged to participate in as wide a range of activities as possible. If an excursion is to cater for participants with additional support needs, a suitable venue should be selected.

Information to participants

- 86.** The group leader should decide how information is provided, but must ensure that the participants understand key safety information. For some young people on overnight visits it may be their first experience away from home on their own and in the close company of others. Participants should understand:
- the aims and objectives of the excursion/activity;
 - the background information about the place to be visited;
 - basic foreign words where appropriate;
 - relevant foreign culture and customs. See Chapter 9 **Visits abroad**;
 - how to avoid specific dangers and why they should follow rules;
 - why safety precautions are in place;
 - why special safety precautions are in place for anyone with disabilities;
 - what standard of behaviour is expected from participants;
 - appropriate and inappropriate personal and social conduct, including sexual activity;
 - who is responsible for the group;
 - what not to bring back either within the UK or from abroad, such as drugs, knives etc;
 - what to do if approached by anyone from outside the group;
 - rendezvous procedures;
 - what to do if separated from the group;
 - emergency procedures.
- 87.** A checklist to give to pupils is at Model form 6 in Chapter 11.
- 88.** For residential visits all group members should carry the address and telephone number of the accommodation in case an individual becomes separated. This applies to exchange visits when participants will also need to know about any ground rules agreed between the group leader and host family.
- 89.** Where excursions involve multiple activities with differing requirements, each activity will need to be assessed and separate information provided. Participants should be aware of who is responsible in any instances where the group leader has delegated responsibility to another member of staff or instructor.
- 90.** If at any time there is change in the planned schedule new activities should be assessed and participants provided with the appropriate information.

Preparing participants for remote supervision

91. During any time that remote supervision takes place the group leader must ensure that participants are aware of the ground rules and are adequately prepared for remote supervision. The size of each group should also be considered. As a minimum, participants should have the following:

- telephone numbers and emergency contacts if lost;
- money;
- maps and plans and any other information for them to act effectively;
- location of local telephones and the appropriate coins;
- a knowledge of how to summon help;
- a knowledge of out of bounds areas or activities;
- identity cards and a rendezvous point.

92. It is important that participants are told not to become separated from their group, are given clear instructions about permitted remote supervised activities and understand and accept the ground rules. See **Remote supervision** in Chapter 3 paragraphs 78 – 80 and for **Remote supervision during adventure activities** see Chapter 8 paragraphs 171 – 175.

Transport and participants

93. Participants using transport on an excursion should be made aware of basic safety rules including:

- arrive on time and wait for the transport in a safe place;
- do not rush towards the transport when it arrives;
- wear your seatbelt and stay seated whilst travelling on transport;
- never tamper with any of the vehicle's equipment or driving controls;
- bags must not block aisles or cause obstructions;
- never attempt to get on or off moving transport;
- never lean out of or throw things from the window of the transport;
- never get off a vehicle held up by traffic lights or in traffic;
- never leave a vehicle without the permission of the leader;
- never run about or pass someone on steps or stairs while transport is moving;
- never kneel or stand on seats;
- never distract or disturb the driver or impede the driver's vision;
- stay clear of doors after boarding or leaving the transport;
- after leaving the vehicle, always wait for it to move off before crossing the road;
- if you have to cross roads to get to the transport in the UK always use the Green Cross Code;
- if you feel unwell tell a leader or supervisor.



94. The group leader should ensure that participants know what to do if they miss the scheduled departure time.

Participants with additional support and medical needs

95. Establishment heads should make every effort to include participants with additional support or medical needs in excursions, whilst maintaining the safety of everyone in the group. They should ensure that consideration is in compliance with the duties under Part IV of the Disability Discrimination Act 1995, as amended by the Special Educational Needs and Disability Act 2001. Special attention should be given to appropriate supervision ratios and additional safety measures may need to be addressed at the planning stage.

Participants with medical needs

96. Additional safety measures to those already in place in the establishment may be necessary to support participants with medical needs during excursions in line with the local authority's policy on the administration of medicines. Arrangements for taking medication and ensuring sufficient supplies for residential visits may be required, including safekeeping.
97. All leaders supervising visits should be aware of participants' medical needs and any medical emergency procedures. Summary sheets held by all leaders, containing details of each participant's needs and any other relevant information provided by parents, is one way of achieving this. If appropriate, a volunteer leader should be trained in administering medication, if they have not already been so trained, and should take responsibility in a medical emergency. If the participant's safety cannot be guaranteed, it may be appropriate to ask the parent or a care assistant to accompany a particular participant.
98. The group leader should discuss the participant's individual needs with the parents. Parents should be asked to supply:
- details of medical conditions;
 - emergency contact numbers;
 - the participant's GP's name, address and phone number;
 - information on whether the participant has spent a night away from home before and their ability to cope effectively;
 - written details of any medication required (including instructions on dosage/times) and parental permission to administer;
 - parental permission if the participant needs to administer their own medication or agreement for a volunteer leader to administer – parents should provide advice/information to assist with the preparation of an emergency plan;
 - information on any allergies/phobias;
 - information on any special dietary requirements;

- information on any toileting difficulties, special equipment or aids to daily living;
 - special transport needs for participants who require help with mobility.
- 99.** Enquiries should be made at an early stage about access and facilities for securing wheelchairs on transport and at residential centres etc, if appropriate. If ramps are not going to be available in certain places, the organisers may wish to arrange to take portable ramps with them. The group leader should at an early stage assess whether manual handling skills will be needed and, if so, whether training should be sought.
- 100.** All leaders supervising the excursion should be given the opportunity to talk through any concerns they may have about their ability to support the participant. Extra help should be requested if necessary, e.g. a care assistant.
- 101.** If leaders are concerned about whether they can provide for a participant's safety or the safety of other participants on a trip because of a medical condition, they should seek general medical advice from the School Health Service or further information from the participant's parents. For further SEED guidance see *The Administration of Medicines in Schools* (see Annex A on how to obtain a copy).
- 102.** The group leader should check that the insurance policy covers staff and participants with pre-existing medical needs.

Participants with additional support needs

- 103.** Establishments will already be familiar with the nature of a participant's additional support needs. They should use the planning stage and the risk assessment to consider how the needs of the participants who require additional support can be met. In particular, they should take account of their duties under Part IV of the Disability Discrimination Act 1995, as amended by the Special Educational Needs and Disability Act 2001. The duties make it unlawful to discriminate, without justification, against disabled pupils and prospective pupils, in all aspects of school life, including school excursions, clubs and activities. The principle behind the legislation is that, wherever possible, disabled people should have the same opportunities as non-disabled people in their access to education. The following factors should be taken into consideration:
- how might the participant best be able to take part in and benefit from the activity?
 - does the activity need to be adapted to enable the participant to take part to the best of their ability at a suitable level?
 - what additional/different resources are necessary?
 - who will be responsible for ensuring that instructions are clearly explained to the participant?
 - will additional supervision be necessary?



- 104.** It may be helpful to the participant if one of the supervisors already knows them well and appreciates their needs fully. The group leader should discuss the visit with the parents of participants with additional support needs to ensure that suitable arrangements have been put in place to ensure their safety.

Communicating with parents



Information to parents

- 105.** The question of communication with parents arises for participants under the age of 16 and for those between 16 and 18 participating in full time education. Parents should be informed in writing of any off-site activity or excursion unless it is a regular part of the school curriculum which parents have already been informed about through the school handbook or a letter. Seeking annual consent for such routine excursions may be appropriate.
- 106.** Before residential visits, or when the participants are to travel abroad or engage in adventure activities, parents should be encouraged to attend a briefing meeting where written details of the proposed excursion should also be provided. The information given should be sufficiently detailed to ensure that parents can make an informed choice about participation, bearing in mind that many activities have a high level of perceived risk, but a low level of real risk. There should be alternative arrangements for parents who cannot attend or for whom English is not their first language.
- 107.** Parents need to be aware that the leaders and other adult supervisors on the visit will be exercising the same care that a prudent parent would. The following information on matters that might affect participant health and safety should be given to parents:
- dates of the excursion;
 - the excursion's objectives;
 - times of departure and return – parents must have agreed to meet their child on return;
 - the location where the participants will be collected and returned;
 - mode(s) and duration of travel including the name of any travel company;
 - the size of the group and the level of supervision including any times when remote supervision may take place;
 - details of accommodation with security and supervisory arrangements on site;
 - details of provision for additional support or medical needs;



- procedures for participants who become ill;
- names of leader, of other staff and of other accompanying adults;
- details of the activities planned and of how the assessed risks will be managed;
- standards of behaviour expected in respect of, for example, alcohol, sexual behaviour, smoking and general group discipline including prohibited items. This information may take the form of a code of conduct which parents should sign;
- what participants should not take on the visit or bring back;
- details of insurance taken out for the group as a whole in respect of luggage, accident, cancellation, medical cover, any exceptions in the policy and whether parents need to arrange additional cover;
- clothing and equipment to be taken;
- money to be taken and arrangements for safekeeping and issue of pocket money;
- the information to be given by parents and what they will be asked to consent to;
- on exchange visits, the details of the host families. For example, whether they have hosted any of the establishment's pupils before;
- the establishment's policy on the use of phones, both mobile and land-line, during excursions;
- details on the cost of the visit. See **Financial planning** paragraphs 51 – 53.

Parental consent

108. Heads of establishments or group leaders should seek written consent for:

- non-routine visits;
- adventure activities;
- hazardous environments;
- excursions abroad;
- other residential visits;
- remote supervision.

109. If parents withhold consent absolutely the participant should not be taken on the excursion but the curricular aims of the visit should be delivered to the participant in some other way wherever possible. If the parents give a conditional consent the head of establishment will need to consider whether the participant may be taken on the visit or not.

110. A parental consent form should be completed for each participant in the group. Besides conveying the parents' consent it could also form the basis for obtaining details required. If a tour operator is used it may be sensible to ask them what information to obtain. General issues to consider include:

- any allergies/phobias the participant may have;
- any medication the participant is taking (if so what the dosage is and who is to administer it);

- whether the participant administers their own medication;
- any contagious or infectious diseases suffered within the family during the preceding 4 weeks, and any other recent illnesses suffered by the participant;
- the name, address and phone number of the participant's GP;
- any special/medical dietary requirements;
- whether the participant suffers from travel sickness;
- information on any toileting difficulties;
- whether the participant has any night time tendencies such as sleepwalking (for residential visits);
- the participant's ability to swim in the pool or sea and their level of safety awareness;
- any other information which the parent thinks should be known;
- the parental home and daytime phone numbers and addresses;
- an alternative contact, with their phone number and address.

111. The contents of a consent form for a parent to sign will vary according to the type of excursion. See Model form 7 Parental consent for a school or similar excursion and Model form 11 Consent for swimming activities in Chapter 11.

Medical consent

112. This should form part of the parental consent form. Parents should be asked to agree to the participant receiving emergency treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities. If parents do not agree to this, heads of establishments may decide to withdraw the child from the excursion – given the additional responsibility this would entail for the group leader.

113. Doctors can be expected to carry out necessary emergency treatment without parental consent but it is possible that a surgeon in another country might be reluctant to operate on a participant unless assured that the group leader had parental authorisation to agree to such treatment. It is sensible to include a translation of the medical consent, as signed by the parent, in the relevant foreign language.

Other consent

114. Parental consent should be obtained specifically for the transporting of participants in the private vehicle of a non-teacher adult or another participant on the excursion. Heads of establishments should consider whether consent should be obtained before participants can be carried in a teacher's private vehicle. All vehicles and drivers used for the transportation of participants should be appropriately insured.

Early return

115. The group leader should tell parents if they will be expected to fund the early return of a participant whose conduct gives cause for concern on an excursion. A written agreement may be necessary.



Contact with parents during the visit

116. Heads of establishments should ensure that parents can contact their child via the home base contact and the group leader in the event of a home emergency, and that they have a number to ring for information in the event of an incident during the visit or a late arrival home. Parents should therefore:

- know the destination details;
- be aware of the emergency contact arrangements at home (particularly important during holiday periods when the school may be closed) and at all the venues the group will visit;
- provide contact numbers for day and night use in an emergency.

117. This is best done by means of the consent form.

Participants' contact with parents

118. Group leaders should arrange for parents to be told by the establishment of the group's safe arrival. One way of doing this is by a 'telephone tree' whereby one parent contacts an agreed group of parents who then contact a further group. But participants may wish to speak to their parents individually. Such arrangements should be agreed with parents and participants before the visit takes place, and should take account of the establishment's policy on the use of phones, both mobile and land-line, during excursions. Parents concerned after a phone call should contact the home base contact.

Chapter 6

Planning transport



General

119. The group leader must give careful thought to planning transport. Local authority schools should follow their authority's transport policies. The main factors to consider include:

- passenger safety;
- the competence and training of the driver to drive the proposed vehicle and whether the driver holds the appropriate valid licence;
- number of driving hours required for the journey and length of the driver's day (including non-driving hours);
- capacity and experience of driver to maintain concentration – whether more than one driver is needed to avoid driver fatigue;
- type of journey – will the excursion take place locally or will it include long distance driving ie motorways;
- traffic conditions;
- contingency funds and arrangements in case of breakdown/emergency;
- appropriate insurance cover;
- weather;
- journey time and distance;
- stopping points on long journeys for toilet and refreshments;
- supervision.



Legislation

- 120. The employer**, usually the local authority, should satisfy themselves that all travel arrangements, including the hire of private coaches or buses, are suitable for the nature of the visit. In practice heads of establishments will normally carry out these checks.
- 121. The driver** is responsible for the vehicle during the visit.
- 122. Seat belts:** All minibuses and coaches which carry groups of three or more children aged between 3 and 15 years inclusive must be fitted with a seat belt for each child. The seats must be forward or rearward facing and seat restraints must comply with legal requirements. For further information contact the Department for Transport (DfT). See Annex B for address details.

Supervision on transport

- 123.** The level of supervision necessary should be considered as part of the risk assessment for the journey. The group leader is responsible for the party at all times including maintaining good discipline.
- 124.** The driver should not normally be responsible for supervision. Driver supervision may be sufficient if a small number of older participants are being taken on a short journey. All group members should be made aware of the position of the emergency door and first aid and anti-fire equipment on transport. The group leader should also be aware of alternative routes or means of travel in the event of delay or cancellation.
- 125.** Factors that the group leader should consider when planning supervision on transport include:
- the level of supervision that will be necessary on double decker buses/coaches – one supervisor on each deck should be appropriate in normal circumstances;
 - safety when crossing roads as part of the journey – the group leader should ensure that participants know how to observe the safety rules set out in the Highway Code and the Green Cross Code. Pedestrian crossings and traffic lights or footbridges should be used to cross roads, whenever possible;
 - safety on buses, trains, ferries and boats – the group leader should make clear to participants how much or little freedom they have to ‘roam’. Misbehaviour is a main cause of accidents to young people on such means of transport. Appropriate supervision and discipline should be maintained at all times. Participants should also be made aware of what to do in an emergency and where emergency procedures are displayed;
 - booking transport – the group leader should arrange for seats to be reserved well in advance to ensure that the party can travel together;
 - safety of participants whilst waiting at pick-up and drop-off points and when getting on or off transport, particularly when using UK vehicles abroad. Participants should be made aware of safety rules and expected standards of behaviour. See **Transport and participants** in Chapter 4 paragraphs 93 – 94;

- safety while on stops or rests during the journey – group leaders should plan with the driver sufficient stops at suitable areas to ensure the safety of all group members including the driver. Drivers of buses and coaches must comply with legislation covering maximum periods of driving and minimum rest periods;
- safety of the group in the event of an accident or breakdown – the group should remain under the direct supervision of the group leader or other supervisors wherever possible;
- head counts, by the group leader or another delegated supervisor, should always be carried out when the group is getting off or onto transport or whenever the vehicle has stopped and there is the possibility that someone has got off without letting a leader know e.g. at a service station during a refuelling stop;
- responsibility for checking that seat belts are fastened;
- consider whether a visible and easily recognisable article of clothing should be worn in common by participants;
- participants should be made aware that they are not allowed access to the driving area at any time;
- group members should be made aware that travel sickness tablets should only be administered to a participant with previous authorisation from the parents in line with the authority's policy on the administration of medicines;
- vetting non-leader drivers. See **Vetting suitability** in Chapter 3 paragraphs 65 – 74.

Hiring coaches and buses

- 126.** The group leader is responsible for ensuring that coaches and buses are hired from a reputable company. Professional operators of buses and coaches are legally required to be licensed. Establishments using operators to transport participants should ensure that the operators have the appropriate public service vehicle (PSV) operators' licence. When booking transport, the group leader should ensure that seat belts are available for participants. Whilst seat belts must be fitted on coaches which carry groups of children, they are not legally required on buses. Buses where seat belts are not fitted are not normally appropriate for excursions involving long journeys.
- 127.** If any of the group use a wheelchair, the group leader should ensure that transport used has appropriate access and securing facilities. It may be appropriate to use portable ramps. DfT can provide advice. See Annex B for address details.



Licences and permits

- 128.** A public service vehicle (PSV) licence is required by establishments running or hiring their own vehicles where any payment is made towards the cost of participants being carried. There are two types of licence – restricted (for up to two vehicles) and standard national (more than two vehicles). Local Traffic Commissioners can provide advice and application forms for PSV operator licences.
- 129.** Establishments can apply to their local authority or the local Traffic Commissioner for a permit issued under Section 19 of the Transport Act 1985. Permit holders are exempt from the need to hold a PSV operators' licence and, in certain circumstances, from meeting all the driver licensing requirements. Section 19 Permits cannot be used outside the UK and separate rules exist for all those wishing to take minibuses abroad. DfT can provide advice – see Annex B for contact details.
- 130.** 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 bus) driving test – unless they are driving under a section 19 permit, in which case the following conditions must be met:
- the driver has held a category B (car) licence for at least 2 years (all permit drivers must be 21 or over);
 - the driver receives no payment or consideration for driving the vehicle other than out-of-pocket expenses;
 - the minibus has a gross weight not exceeding 3.5 tonnes (4.25 tonnes including any specialised equipment for the carriage of disabled passengers).
- 131.** Drivers of any vehicle must ensure that they have the correct entitlement on their licence.

Private cars

- 132.** Leaders and others who drive participants in their own car must ensure their passengers' safety, that the vehicle is roadworthy, and that they have appropriate licence and insurance cover for carrying the participants. This could include a sight of original documents, if appropriate. Volunteers should be carefully vetted by the establishment before they are permitted to drive participants in their car. If necessary, assurances should be requested by the head of establishment. See **Vetting suitability** in Chapter 3 paragraphs 65 – 74.
- 133.** The driver is responsible for making sure that participants have a seat belt and use it at all times. Vehicles without seat belts must not be used.
- 134.** Heads of establishment or group leaders who wish to use parents, volunteers or other participants to help transport participants in their own cars must ensure that they are aware of their legal responsibility for the safety of the participants in their cars, that the vehicle is roadworthy, and that they have appropriate licence and insurance cover for carrying the participants. Parents' agreement should be sought (on the consent form) for their children to be carried in other parents' cars. It is advisable that parents driving participants are not put in a position where they are alone with a participant. The group leader should arrange a central dropping point for all participants rather than individual home drops.

Transport in the establishment minibus

135. Many establishments use their own minibuses for short frequent journeys and sometimes for longer trips. Minibuses have a maximum capacity of 16 seated passengers plus the driver. They must comply with the various regulations about construction and fittings. A forward or rearward facing seat with seat belt must be provided for each participant. An important source regulation is the *Road Vehicle (Construction and Use) Regulations 1986*, particularly Schedule 6 of that regulation. DfT can provide further advice. See Annex B for contact details.

Establishment minibus driver

136. Although the head of establishment is ultimately responsible for the establishment's minibus, the driver is responsible for the vehicle during the visit. The minibus driver must be qualified to drive a minibus and have a valid and clean driving licence – see **Licences and permits** above. It is advisable for all those who may drive the establishment minibus to receive training in minibus driving and the management of passengers such as that provided under the Minibus Driver Awareness Scheme (MIDAS). The head of establishment should ensure that those driving establishment minibuses have a rest period before driving. Minibus drivers must always adhere to transport regulations. DfT can provide advice on relevant transport legislation. The Royal Society for the Prevention of Accidents have issued *Minibus Safety: a Code of Practice*. See Annexes A and B for contact addresses and publication details.

137. The minibus driver must:

- observe local authority or other establishment manager's guidance, where appropriate;
- not drive when taking medication or undergoing treatment that might affect their ability or judgement;
- know what to do in an emergency;
- know how to use fire fighting and first aid equipment;
- avoid driving for long periods and ensure that rests are taken when needed;
- clarify and comply with transport regulations and the requirements of the vehicle's insurance cover;
- take into consideration the effects of teaching and the working day;
- have regular medical checks e.g. eyesight.



Maintenance and checks of the establishment minibus

138. The head of establishment will usually be responsible for the minibus. However, a head of establishment may delegate to a willing member of staff responsibility for carrying out regular checks and ensuring that the minibus is maintained. This member of staff should report to the head of establishment, who is responsible, along with the local authority and other leaders, for ensuring the safety of participants on establishment-organised journeys. The person responsible for maintaining the minibus should:

- check the vehicle's condition on a weekly basis;
- ensure proper servicing by a reputable garage;
- maintain the record-of-use book with the service history, insurance and other relevant documents;
- check with the head of establishment before allowing anyone not so authorised to drive the vehicle;
- ensure that any staff driving the minibus are competent and have undertaken suitable training to do so, such as MIDAS;
- always be informed before other staff use the establishment's minibus;
- ensure that drivers of the establishment's minibus are aware that the vehicle should always be logged in and out.

For **organising your own transport for visits abroad** see paragraphs 194 – 195 in Chapter 9.



General

139. The group leader must ensure, well before the group departs, that adequate insurance arrangements are in place. Insurance may be provided by, for example, the local authority, a travel firm, a bank or the organisation to be visited as well as by an insurance company.

Insurance in local authority establishments

140. Heads of establishments or group leaders in local authority establishments should clarify with their education authority what insurance provision already exists and what additional cover may need to be arranged. Local authorities, under Section 3(1)(a) of the Employers Liability (Compulsory Insurance) Act 1969, are exempted from the requirement to have employers liability insurance against the risk of injury to their employees. Some local authorities may nevertheless choose to have such insurance in place. Public liability insurance, against the risk of injury to others, is optional in both public and private sectors.

Other establishments

141. Heads of establishments or group leaders in other establishments, such as independent schools, will need to investigate and make satisfactory arrangements of their own.

Insurance and parents

142. The group leader should write to the parents to tell them which responsibilities the local authority/establishment accepts and the scope of any insurance cover the establishment is to arrange. It is advisable to make copies of the insurance schedule available to parents as early as possible in the booking process.

Insurance cover for excursions

143. Insurance policies are legal documents. They will impose conditions, limit the cover, and exclude certain people or activities. Insurance companies/travel firms can advise on particular types of insurance. However, the following are examples of cover which may be appropriate to many types of excursion:



- employers liability;
- public liability;
- personal accident cover for leaders, other adults, and participants;
- costs of medical treatment;
- specialised risk activities (often excluded from standard policies) and the costs of evacuation for medical reasons when abroad;
- damage to or loss of hired equipment (check the wording of the hire agreement);
- programmed and non-programmed activities;
- transport and accommodation expenses in case of emergency;
- compensation against cancellation or delay;
- compensation for loss of baggage and personal effects including money;
- legal assistance in the recovery of claims; and
- failure or bankruptcy of the centre or travel company.

- 144.** Additional arrangements may be necessary to obtain insurance cover for activities abroad and activities of a potentially hazardous nature. The group leader should scrutinise carefully the list of exclusions in the policy. If there is any doubt about the cover the insurer should be asked for clarification.
- 145.** The group leader should ascertain the details of the insurance held by the tour operator.
- 146.** Additional cover may be necessary for participants with medical conditions. The group leader should check this with the insurance company before departure.

Cancellations

- 147.** Some parents may cancel their child's place on the excursion. The group leader should forward any cancellations to the insurer/operator as soon as possible, in writing, if a replacement is not available. Delay in notification may incur cancellation charges.

Transport

- 148.** When hiring coaches etc the group leader should check that the company used has appropriate insurance. The local authority may have a list of such companies.
- 149.** Use of local authority/private vehicles: the group leader should check that the insurance policy for the establishment minibus is appropriate to the journey. Taking a vehicle abroad may require extra insurance and other documentation. Ideally, the insurance should cover repatriation of the party and the return home of the vehicle.
- 150.** The group leader should check that the leader driving the vehicle abroad is appropriately insured and that their driving licence is valid for the countries to be visited or passed through en route.
- 151.** Leaders, other adults or participants using their own cars to carry participants on excursions should ensure that their vehicle is properly licensed and that the insurance covers its use on establishment business.
- 152.** Some establishments and local authorities take out their own policies to cover any claim which may be made against them as a result of transport provided in a private car. But this does not exempt the driver from taking out appropriate insurance.

Types of visit



Adventure activities using licensed providers

153. When planning to use adventure activity facilities offered by a commercial company or by a local authority the group leader should follow the policy of the local authority or establishment and check:

- whether the provider is legally required to hold a licence for the activities it offers and, if so,
- that the provider actually holds a licence.

154. Some 950 providers currently hold a licence across the UK. The relevant legislation is the Activity Centres (Young Persons' Safety) Act 1995 and the associated Adventure Activities Licensing Regulations 2004 (which replace Regulations made in 1996). It is illegal for a provider of licensable status to offer a licensable activity without a valid licence. The Adventure Activities Licensing Authority can check on the licence status of a provider. Their address is: Adventure Activities Licensing Authority, 17 Lambourne Crescent, Llanishen, Cardiff CF4 5GG, telephone 029 20755715 or fax 029 20755757. Their internet site is www.aala.org

155. A licensed provider does not necessarily have to hold a licence for all its activities – only those providers and activities stipulated by the 2004 Regulations. Other activities offered may be accredited under non-statutory schemes. The provider can give information on what activities are licensed or accredited.

156. Many of the activities that participants take part in will be covered by health and safety legislation alone. However, under the 2004 Regulations, the following activities – where undertaken by young people under 18 years unaccompanied by a parent – need a licence when commercial companies sell them, or when local authorities provide them with or without a charge:

- **caving:** the exploration of underground passages, disused mines, or natural caves which requires the use of special equipment or expertise;



- **climbing:** climbing, sea-level traversing, abseiling or scrambling over natural terrain or certain man-made structures which requires the use of special rock-climbing or ice-climbing equipment or expertise;
- **trekking:** going on foot, horse (pony), pedal cycle, skis, skates or sledges over moorland, or on ground over 600 metres above sea level when it would take 30 minutes to reach an accessible road or refuge. Off-piste skiing requires a licence;
- **watersports:** this comprises sailing, canoeing, kayaking, rafting and windsurfing, on the sea, tidal waters, inland waters at a location where any part of those waters is more than 50 metres from the nearest land, and turbulent inland waters. Rowing is exempt.

157. Holding a licence means that a provider has been inspected and the Licensing Authority are satisfied that appropriate safety measures are in place for the provision of the specified licensed adventure activities. Other elements of the provision – such as catering and accommodation – are not covered by the licensing scheme. These should be checked separately by the group leader. See **Other issues to consider with all adventure activity providers** paragraphs 164 – 166 and **Residential visits** paragraphs 190 – 191.

Adventure activities using non-licensable providers

158. Not all providers are required to hold a licence. Voluntary bodies and schools providing for their own members and pupils respectively are exempt. Commercial bodies and local authorities are also exempt if their activities fall outside the scope of the regulations. Not holding a licence does not imply a lack of safety. It might simply mean the provider or the activity is not licensable.

159. Many providers are accredited under non-statutory schemes run by, for example, VisitScotland and certain National Governing Bodies of Sport (NGBs). Establishments/ local authorities can contact these accreditors to ascertain a provider's management of safety. The British Activity Holiday Association and The Scottish Activity Holiday Association can provide advice on accreditations. A list of contacts is at Annex B.

160. Some local authorities have introduced rules along with specimen questionnaires which establishments can use to carry out appropriate safety checks at the planning stage.

161. If proposing to use a non-licensable provider, the group leader should obtain assurances in writing from the provider that:

- risks have been assessed and that the provider's staff are competent to instruct and lead participants of the group's age range on the activity. Competence could be demonstrated by holding the relevant NGB award where it exists or through successful participation in an NGB approved in-house scheme overseen by an appropriately qualified technical adviser;
- the equipment is appropriate and that its safe condition is checked before each use;

- operating procedures conform to the guidelines of the NGB for the activity where this is appropriate;
 - clear management of safety systems is in place;
 - there is appropriate provision for first aid;
 - there are emergency procedures (including arrangements for informing next of kin and for alerting the group leader);
 - that the provider's staff are competent in the procedures and will hold emergency phone numbers and addresses of the group members;
 - and that the group will have a fire drill as soon as possible on arrival at the provider's base.
- 162.** The group leader may wish to ask the provider for names of other establishments which have recently used its facilities, and to seek a copy of the provider's operating procedures and risk assessment documentation.
- 163.** See also **Residential visits** paragraphs 190 – 191.

Other issues to consider with all adventure activity providers

- 164.** The group leader should check and agree the provider's arrangements for supervision and recreation during the evenings and between adventure activities. The group leader should also provide any relevant information to the provider such as the group's age-range, relevant medical conditions, additional support needs, competence etc.
- 165.** The group leader and other supervisors retain ultimate responsibility for participants at all times during adventure activities, even when the group is under instruction by a member of the provider's staff. The provider is responsible for the safe running of an activity. Clear handover and handback procedures should be in place. Everyone, including the participants, must have an understanding of the roles and responsibilities of the establishment's staff and the provider's staff.
- 166.** The group leader and other supervisors should have sufficient information on what the activity involves before it takes place. They should approach the instructor at an appropriate safe interval if they are concerned that the participants may be at unnecessary or unreasonable risk. Assurances may be sought that the provider has:
- checked the suitability of the staff, including temporary workers, to work with young people. See **Vetting suitability** in Chapter 3 paragraphs 65 – 74;
 - clearly defined the roles and responsibilities of its staff;
 - the appropriate security arrangements;
 - appropriate public liability insurance;
 - a health and safety policy and risk assessments.



Establishment-led adventure activities

167. If a member of the establishment staff is to organise, lead and instruct participants on adventure activities they should complete the checks set out in this guidance under **Risk assessment** in Chapter 2 paragraphs 35 – 44.

168. The education authority or managers of non-local authority establishments should satisfy themselves that:

- the group leader and other supervisors are competent to act as leaders and/or instructors of participants in the activity – bearing in mind that some of these participants may be novices. Competences should be demonstrated by holding the relevant NGB award where it exists. The relevant NGB can advise on this. See Annex B for contact details;
- there is access to technical advice where necessary;
- the group leader is competent in safety procedures and the planning of adventure excursions;
- an appropriate risk assessment has been completed;
- the supervision will be appropriate;
- there is adequate first aid provision, expertise and equipment within the group;
- the emergency procedures include activity-specific measures and that supervisors are competent to carry them out;
- the equipment is appropriate, safe and in good condition;
- every participant is suited to the activity and is properly prepared and equipped.

169. See Model form 1 in Chapter 11 which sets out a format for seeking approval of a visit.

Employment of providers

170. Establishments choosing to employ, rather than contract with, an unlicensed freelance provider of adventure activities – who would otherwise need a licence to trade – take full legal responsibility for all aspects of the activity. If the provider, in the employment of the establishment, provides licensable facilities to those attending another establishment, the employing establishment will need a licence.

Remote supervision during adventure activities

171. Some adventure activities – such as those under the Duke of Edinburgh’s Award Scheme – require participants to work in small groups without direct supervision. Particular attention needs to be given to the information provided to participants before supervision can be withdrawn.

172. The training given to participants must be sound, thorough and appropriate and should be assessed separately. The instructor should have the appropriate qualifications or experience to provide training in the activity. The group leader should be satisfied that the participants have acquired the necessary skills and have the necessary experience, confidence, physical ability and judgement to be left without direct supervision.

- 173.** The withdrawal of direct supervision should be a gradual four stage process:
- accompanying the group;
 - shadowing the group;
 - checking regularly at agreed locations;
 - checking occasionally at agreed locations.
- 174.** Participants should be familiar with all equipment used or taken without direct supervision and, in addition to training, an initial element of adult supervision in the use of equipment may be required. The condition and suitability of any equipment, particularly safety equipment, taken or used during these activities should be assessed separately.
- 175.** See **Supervision** in Chapter 3 and **Preparing participants for remote supervision** in Chapter 4 paragraphs 91 – 92.

Coastal visits

- 176.** Group leaders and other supervisors should be aware that many of the incidents affecting participants have occurred by or in the sea. There are dangers on the coast quite apart from those incurred in swimming (for which see separate section below). The group leader should bear the following points in mind when assessing the risks of a coastal activity:
- tides, rip tides and sandbanks are potential hazards – timings and exit routes should be checked;
 - ensure group members are aware of warning signs and flags;
 - establish a base on the beach to which members of the group may return if separated;
 - look out for hazards such as glass, barbed wire and sewage outflows etc;
 - some of a group's time on a beach may be recreational. Group leaders should consider which areas of the terrain and sea are out of bounds;
 - cliff tops can be highly dangerous for groups even during daylight. The group should keep to the path at all times. Group leaders should consider whether it is safe or legal for participants to ride mountain bikes on coastal paths.
- 177.** The local coastguard, harbour master, lifeguard, local authority adviser, countryside ranger or tourist information office can provide information and advice on the nature and location of hazards.

Swimming in the sea or other natural waters

- 178.** Swimming and paddling in the sea or other natural waters are potentially dangerous activities, particularly for a school or similar group. They should only be allowed as formal and supervised activities, preferably in recognised bathing areas which have official surveillance i.e. qualified lifeguard cover. Nonetheless, participants should always be in sight of their supervisors. One supervisor should always stay out of the water for better surveillance.



- 179.** The group leader, or another designated supervisor in the group, should hold a relevant life saving award, especially where lifeguard cover may not be available. For further advice contact the Royal Life Saving Society. See Annex B for address details.
- 180.** Some local authorities advise their establishments that a ratio of 1 adult to 10 pupils is a minimum for the purpose of supervision. The group leader should assess the risks and consider an appropriate safe supervision level for their particular group before the activity takes place. There should be someone in attendance with competence in life saving and resuscitation.
- 181.** The group leader should:
- be aware that many young people who drown are strong swimmers;
 - ascertain for themselves the level of the participant's swimming ability;
 - be aware of the local conditions – such as currents, weeds, water quality/pollution, a shelving, uneven or unstable bottom – using local information such as that provided by the lifeguard, coastguard, local environmental protection authority, harbour master, police or tourist information office;
 - designate a safe area of water for use by the group;
 - be aware of the dangerous effects of sudden immersion in cold water;
 - be aware of the dangers of paddling especially for young children;
 - ensure that participants have not eaten (at least half an hour) before swimming;
 - ensure the activity is suitable for the participants, especially any with disabilities;
 - adopt and explain the signals of distress and recall.

Swimming pools

- 182.** Heads of establishments and local authority officers will be aware of their local swimming pool facilities for curricular activities. Group leaders should follow the recommended safe supervision levels at the pool for participants. Levels of supervision should take account of the age and swimming abilities of participants, and the nature of the facility being used.
- 183.** If considering the use of a swimming pool not used before or monitoring the hazards of a regularly used pool it is advisable to observe and check the following:
- is there constant pool supervision by a sufficient number of qualified lifeguards?
 - where there is no lifeguard the group leader should stay at the poolside at a raised location. In such circumstances, the group leader, or a designated supervisor, should have a relevant life saving award and be accompanied by an appropriate number of other supervisors;
 - is the water temperature appropriate?
 - is the water clear?
 - are there signs clearly indicating the depth – is there a shallow end and is the water there shallow enough?

- does the deep end allow for safe diving?
- what are the management arrangements for the use of flumes?
- is there a poolside telephone?
- are there a resuscitator and other pieces of first aid and rescue equipment, and is there someone trained to use them?
- is there a changing room for each sex?
- does the pool cater for participants with disabilities?
- does the pool cater for any particular religious or cultural factors?
- are the changing and showering facilities safe and hygienic?
- can clothes be stored securely?
- have the participants been instructed how to behave in and around the water?

184. See Model form 11 for parental consent for swimming activities and Model form 10 for a checklist on swimming safety, in Chapter 11. Parental consent does not mean that group leaders should not check for themselves the level of a participant's swimming ability.

Farm visits

185. It is recognised that there is great educational value attached to children visiting working farms, and a variety of areas in the 5-14 curriculum can usefully be explored before, during and after a visit. However farms can be dangerous even for the people who work on them, and there are obviously issues for schools and other similar establishments around identifying, assessing and managing the range of health and safety risks to which children could potentially be exposed.

186. To assist schools, in May 2003, all primary schools were provided with an information pack, *Health and Safety Advice for Primary School Visits to Farms*. The pack contained the following fact sheets:

- *Avoiding ill health at open farms – Advice to farmers – with teachers supplement – Health and Safety Executive Agriculture Information Sheet no 23 (revised 2002);*
- *Farmwise – Health and Safety Executive MISC165;*
- *Guidelines for Farm Visits – The Royal Highland Education Trust;*
- *Taking the Classroom to the Countryside – The Royal Highland Education Trust;*
- *E Coli 0157 Infection – The Scottish Executive Health Department;*
- *E Coli 0157 Recreational Use of Animal Pasture – The Scottish Executive Health Department;*
- *Health Tips for Teachers Leading School Visits to Farms – NHS Scotland.*

All of this information is available and can be printed off from the Scottish Executive website on www.scotland.gov.uk/library5/health/ecsip-00.asp.



187. The main points from the first of the above leaflets are

Before visit –

- consider the advice in the information pack, or other/additional advice prepared by the local authority;
- decide the ratio of adults to participants;
- discuss with the supervisors – who may be parents or staff of the schools, crèche etc – their role during the visit;
- discuss with participants the rules for the visit;
- make sure participants wear appropriate clothing, including footwear;
- check that any cuts, grazes etc on participants' hands are covered with a waterproof dressing.

During and after the visit –

- make sure the participants do not kiss animals;
- that they always wash their hands thoroughly before and after eating, after any contact with animals and again before leaving the farm;
- that they eat only food that they have brought with them, or food for human consumption, in designated areas, and never eat food which has fallen to the ground, or taste animal foods;
- that they do not suck fingers or put hands, pens, pencils or crayons etc in mouths;
- that they clean or change footwear before leaving, remembering to wash their hands after any contact with animal faeces on their footwear;
- that they do not use or pick up tools;
- that they do not climb on to walls or animal pens etc;
- that they listen carefully and follow instructions given by the farm staff;
- that they approach and handle animals quietly and gently;
- that they do not chase, frighten or torment the animals.

If a child, or member of the group shows signs of illness after a visit, advise them or their parent or guardian to visit the doctor and explain that they have had recent contact with animals.

188. Additional advice and guidance is available from the Royal Highland Education Trust (www.rhet.rhass.org.uk) which has resources in many parts of Scotland.

Field studies

189. Field studies associated with a range of subjects including geography, biology, geology and history might take participants to industrial sites and other urban areas as well as into the countryside and to the coast (see above, **Coastal visits**). The scope of field studies means that the group leaders, who will usually be subject specialists, should also be competent to lead and instruct participants within urban and non-urban environments at minimal risk. See Annex A and B for sources of advice and guidance.

Residential visits

190. A good rule of thumb ratio is 1 teacher for every 10 participants. Issues for the group leader to consider include the following:

- the group should ideally have adjoining rooms with leaders' quarters next to the participants' – the leader should obtain a floor plan of the rooms reserved for the group's use in advance;
- there must be at least one leader from each sex for mixed groups;
- there must be separate male and female sleeping/bathroom facilities for participants and adults;
- the immediate accommodation area should be exclusively for the group's use;
- ensure there is appropriate and safe heating and ventilation;
- ensure that the whole group are aware of the lay-out of the accommodation, its fire precautions/exits (are instructions in English or otherwise clear?), its regulations and routine, and that everyone can identify key personnel;
- security arrangements – where the reception is not staffed 24 hours a day, security arrangements should be in force to stop unauthorised visitors;
- the manager of the accommodation should be asked for assurances that the staff, including temporary workers, have been checked as suitable for work with young people. See also **Vetting suitability** in Chapter 3 paragraphs 65 – 74;
- locks on doors should work in the group's rooms but appropriate access should be available to leaders at all times;
- there should be drying facilities;
- there should be adequate space for storing clothes, luggage, equipment etc, and for the safe keeping of valuables;
- adequate lighting – it is advisable to bring a torch;
- there should be provision for participants with additional support needs and those who fall sick;
- balconies should be stable, windows secure, and electrical connections safe;



- where possible, participants should not be lodged in ground floor rooms;
- the fire alarm must be audible throughout the accommodation;
- there should be recreational accommodation/facilities for the group;
- the hotel/hostel should be able to meet any particular cultural or religious needs of the group;
- there should be an appropriate number of group supervisors on standby duty during the night.

191. Before booking a hotel/hostel abroad, the group leader should confirm it has fire exits and lifts with inner doors and that it meets local regulations. After arrival at any accommodation it is advisable to carry out a fire drill as soon as possible.

Chapter 9

Visits abroad



General

192. Travelling abroad can be hugely rewarding for participants and adults alike, but it is important that careful preparation takes place. Much of the earlier advice in this booklet applies to visits abroad, but there are some additional factors that need to be considered, not least because the legislation may be different from that of the UK. Group leaders should always comply with the establishment/local authority policy on visits abroad. Establishment visits abroad can be made in a number of ways.

Organising your own visit

193. A head of establishment or group leader may decide to organise a package abroad without the help of an outside body. Package organisers have responsibilities under Directive 90/314/EEC. This is implemented in the UK by the Package Travel, Package Holidays and Package Tours Regulations 1992 (The Package Travel Regulations). These regulations apply to packages sold or offered for sale in the UK. They define a package as a combination of any two of: accommodation, transport, or other tourist services not ancillary to transport. Most package arrangements come within scope of the regulations unless they are 'occasional' or part of an educational course programme as compared with a leisure activity such as skiing.

Organising your own transport

194. Group leaders should ensure that drivers taking groups abroad are familiar with driving the coach or minibus in the countries being visited and those en route. EU regulations require the fitment and use of a tachograph and prescribe maximum limits on driving time and minimum requirements for breaks and rest periods. These regulations apply for most drivers of school or other local authority establishment passenger vehicles when undertaking an international journey. Different licence requirements would normally apply for driving abroad. DfT can provide advice on the relevant transport legislation.



195. Factors to consider when travelling abroad include:

- the need to be aware that different legislation and regulations may apply for drivers' hours and record-keeping purposes, particularly in non-EU countries;
- EU drivers' hours and tachograph regulations normally apply to any vehicle with 9 or more passenger seats on journeys through EU countries and some countries outside the EU. In other countries, drivers must observe the domestic rules of the countries being visited. Advice on domestic rules may be obtained from the relevant embassies of the countries concerned;
- special documentation is required for minibuses taken abroad;
- all group members should be aware of unfamiliar right-hand drive traffic. The passenger doors on UK minibuses and coaches may not open on the kerb side in countries where travel is on the right hand side of the road. Extra care will be necessary when the group is climbing in and out of the vehicle. Detours may be necessary to ensure safety;
- carrying capacity and loading requirements;
- DfT can provide information on legal requirements for travel abroad. See Annex B for address details.

Using a tour operator

196. Before using a tour operator, group leaders should ensure it is reputable. Ascertaining this should form part of the risk assessment. The Civil Aviation Authority licenses travel organisers and tour operators selling air seats or packages with an air transport element (Air Travel Organisers Licence or ATOL). The licence is a legal requirement and provides security against a licence holder going out of business.

197. A travel agent does not need to be an ATOL holder if acting only as an agent of an ATOL holder. But if so the group leader must check whether or not the whole package being supplied is covered by the ATOL. If it is not, the organiser must show evidence of other forms of security to provide for the refund of advance payments and the costs of repatriation in the event of insolvency.

198. There are seven bonding bodies approved by the Department of Trade and Industry:

- Association of British Travel Agents (ABTA)
- Federation of Tour Operators Trust (FTOT)
- Association of Independent Tour Operators Trust (AITOT)
- Passenger Shipping Association (PSA)
- The Confederation of Passenger Transport (CPT)
- Yacht Charter Association (YCA)
- The Association of Bonded Travel Organisers Trust (ABTOT)

Operators based abroad

199. Directive 90/314/EEC (as referred to above) applies to all states of the European Economic Area (EEA). Group leaders may wish to use a package organiser based abroad in an EEA state. If so, they should check that it satisfies the requirements of the national legislation implementing the Directive. Details may be available from national tourist offices or embassies/consulates.

Sources of further advice for school and other local authority establishments' travel abroad

200. The following sources may be useful in providing further advice:

- The Department of Trade and Industry – for the regulations governing tour operators;
- The Schools and Group Travel Association (SAGTA) is an independent association with a members' code of good conduct and safety rules. All its members are in ABTA;
- Alternatively, there are voluntary bodies established to promote school journeys, such as the School Journey Association;
- Heads of establishments or group leaders who decide to arrange travel independently may also seek the advice and help of the Foreign and Commonwealth Office's (FCO) Travel Advice Unit. The Unit's purpose is to help intending travellers to avoid trouble abroad. It can provide information on threats to personal safety arising from political unrest, lawlessness, violence etc.

201. Address details are provided in Annex B.

Planning and preparation

202. It is good practice that an exploratory visit to the location should be made, wherever possible. If this cannot be done, the group leader should gather as much information as possible on the area to be visited/facilities from:

- the provider;
- the Foreign & Commonwealth Office's Travel Advice Unit;
- other establishments which have used the facilities/been to the area;
- the local authority/establishments in the area to be visited;
- national travel offices in the UK;
- embassies/consulates;
- travel agents/tour operators;
- The Suzy Lamplugh Trust, a national charity for personal safety, who have produced guidance, including a book called *World Wise: Your Passport to Safer Travel*, a video of the same title, and information on the internet. See Annexes A and B for publication details and contact addresses;
- the internet, books and magazines.



Staffing the visit

203. Staffing ratios for visits abroad are difficult to prescribe as they will vary according to the activity, the participants' age and sex, the location, and the efficient use of resources. A minimum ratio of 1 adult to 10 pupils is a general rule of thumb but at least two of the adults should be teachers in the case of groups of school pupils. There should be enough adults in the group to cover an emergency. There should be a minimum of two adults on every excursion. Mixed gender groups should have at least one male leader and one female leader.

Preparing participants for visits abroad

204. Factors to consider for visits abroad include:

- language – particularly common phrases;
- culture e.g. body language, rules and regulations of behaviour, dress codes, local customs, attitudes to gender etc;
- drugs, alcohol usage;
- food and drink – group members should be warned of the dangers of drinking tap water in certain countries. In some countries it is safer to drink bottled water, and care needs to be taken with raw vegetables, salads and unpeeled fruit, raw shellfish, underdone meat or fish and the use of ice cubes in cold drinks;
- money – how to carry money and valuables discreetly e.g. money belts, zip armllets. If larger amounts of money will be needed, it is advisable to take travellers' cheques;
- how to use phones abroad, money required (a BT contact card allows calls to be charged to the home number) and the code for phoning home;
- what to do in an emergency. See **Emergencies** in this chapter, paragraphs 225 – 228, and Chapter 10 **Emergency procedures**.

Briefing meeting for parents

205. It is particularly important that parents are given the opportunity to meet the leaders and others who will be taking the participants overseas. See Chapter 5 **Communicating with parents**.

Vaccinations

206. The group leader should find out whether vaccinations are necessary and ensure that all members of the group have received them in good time. Check whether the country to be visited requires proof of vaccination. The Department of Health gives advice on vaccination requirements in their publication, *Health Advice to Travellers Anywhere in the World* (See Annex A).

Insurance

207. The group leader must ensure that the group has comprehensive travel insurance. See also Chapter 7 **Insurance**.

Foreign legislation

208. The group leader needs to check relevant legislation, particularly on health and safety e.g. fire regulations.

Language abilities

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

Visas/passports

210. The group leader should ensure that all members of the group have valid passports and visas (if appropriate) in the early stages of planning the trip.

211. Photocopies of the group's passports should be taken for emergency use. Otherwise there can be problems if someone other than the designated leader has to accompany an injured participant back to the UK.

Nationality

212. If the group includes participants whose national or immigration status or entitlement to a British passport is in doubt, it is advisable to make early enquiries of the Home Office's Immigration and Nationality Directorate (see Annex B for address details) concerning the requirements of the immigration rules and the right of re-entry.

213. Participants who are not nationals of any EU member state may need a visa to travel from the UK to another member state. However, they may receive visa exemption if they are members of a school or other local authority establishment group. Details and forms are available from the British Council. (See Annex B for contact details).

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

Care orders and wards of court

215. If a child is subject to a care order, foster parents will need to ensure that the Social Services Department consents to any proposed trip. If a participant is a ward of court, the head of establishment should seek advice from the court in relation to establishment journeys and activities abroad well in advance.

Emergency medical facilities

216. Some of these are available through reciprocal health care arrangements in EU countries to EU Nationals. Form E111 from the Department for Work and Pensions is the certificate of entitlement to free or reduced cost treatment and must be completed by the child's parent. It is available from Post Offices or Free Phone 0800 555777.

217. It is advisable to take a contingency fund as sometimes treatment must be paid for in advance and money has to be claimed back later.



Paperwork

218. The group leader should ensure that they obtain and take with them:

- travel tickets, passports and visas. It is also advisable to carry a separate list of the numbers of any travel documents/passports, and photocopies of all the group's documents in a sealed waterproof bag;
- a copy of the contract with the centre/hotel etc, if appropriate;
- medical papers e.g. forms E111 and significant medical histories;
- parental consent forms and permission for group leader to authorise emergency treatment on parental behalf;
- the phone numbers and addresses, at home and at the establishment, of the head of establishment and of the home base contact, which should be carried on the person at all times;
- the names of parents and the addresses and telephone numbers at which they can be contacted (home and workplace);
- copies of a list of group members and their details;
- details of insurance arrangements and the company's telephone number;
- the name, address and telephone number of the group's accommodation;
- location of local hospital/medical services.

219. The group leader may wish to ask parents for passport size photographs of the participants. It might be useful to have photographs of the adults in the group as well.

Information retained at the establishment

220. Full details of the visit should be retained at the establishment while the visit is in progress. This should include:

- the itinerary and contact telephone number/address of the group;
- a list of group members and their details;
- contact names, addresses, telephone numbers of the parents and next of kin;
- copies of parental consent forms;
- copies of travel documents, insurance documents, medical papers;
- a copy of the contract with the centre/hotel etc, if appropriate; and
- local authority emergency contact numbers.

221. It is the head of establishment's responsibility to ensure this information is available at all times. This is particularly important if the visit takes place when the establishment is closed. Independent school bursars should also hold the information.

During the visit

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

Emergencies

- 225.** The group leader must ensure that all members of the group know what action to take if there is a problem.
- 226.** The group leader and supervisors should know where the nearest British Embassy or Consulate is located and the telephone number. They should also know and understand how to contact the emergency services in the country concerned. Depending on the age of the participants, it may be appropriate to ensure that they have this information to hand.
- 227.** Group leaders need to be aware that some diseases are more prevalent in some countries than in others and should know what action to take should a member of the group become infected.
- 228.** Many of the health problems of participants on longer visits are caused by lack of food, of liquid or of sleep. The group leader should take this into account at the planning stage and take measures to prevent these risks. If appropriate, parents should be asked to provide suitably factored sun protection creams and sun hats/glasses. Group members should be advised about the dangers of over-exertion in the heat and of dehydration, which can cause headache, dizziness and nausea. In warm climates it is important to keep fluid levels high, take extra salt and wear loose, lightweight clothing – preferably made of cotton or other natural fibres.

Contacts at home

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

Travel by air

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



Exchange visits

- 231.** The success of an exchange visit largely depends on good relationships and communications with the partner establishment.
- 232.** Individual establishment exchanges differ from other visits abroad in that participants will spend most of their time with host families and are, therefore, not always under the direct supervision of school staff. Host families will not be subject to UK law.
- 233.** Participants must be aware of the ground rules agreed between the group leader and the host family. Many of the considerations which apply to residential and day trips also apply here. In addition, the following should be ensured by the group leader:
- a good personal knowledge of the host establishment and counterpart;
 - satisfactory 'pairing' arrangements. The partner establishment should tell the host families of any special medical or dietary needs of their guests, age and gender;
 - matches should be appropriate;
 - parents, participants and the host establishment should be clear about the arrangements for collecting and distributing participants to families, and for transporting participants throughout the visit;
 - the head of establishment should retain a list of all the participants involved and their family names and addresses;
 - participants living with host families should have easy access to their teachers or other supervisor, usually by telephone, and should be able immediately to report any situations they feel uncomfortable about;
 - parents should be made aware that their young people living with host families will not always be under direct teacher or similar staff supervision.

Vetting host families

- 234.** Exchange or home stay visits can be arranged through agencies, in which case the agency should have some responsibility for vetting the host families. Group leaders making their own arrangements need to be clear about procedures in the relevant country for vetting the suitability of host families including criminal background checks insofar as these are available.
- 235.** If the host establishment or placing agency does not have appropriate measures in place for carrying out checks to ensure the health, safety and welfare of exchange or home stay participants, the group leader should seek further assurances and/or reconsider whether the visits should take place.

Chapter 10

Emergency procedures



General

- 236.** Leaders in charge of participants during an excursion have a duty of care to make sure that the participants are safe and healthy. They also have a common law duty to act as a reasonably prudent parent would. Leaders should not hesitate to act in an emergency and to take life-saving action in an extreme situation.
- 237.** Emergency procedures are an essential part of planning an excursion. Local authority establishments should follow their authority's guidance on emergency planning procedures, which should include a definition of an emergency or serious incident. Emergency planning officers should be able to advise on what type of incident should trigger an emergency response.
- 238.** If an accident happens, the priorities are to:
- assess the situation;
 - safeguard the uninjured members of the group;
 - attend to the casualty;
 - inform the emergency services and everyone who needs to know of the incident.

Who will take charge in an emergency?

- 239. The group leader** would normally take charge in an emergency and would need to ensure that emergency procedures are in place. The group leader should liaise with the representative of the tour operator if one is being used.
- 240. Pre-arranged home base contact.** The home base contact's main responsibility is to link the group with the establishment, the parents and the local authority (where appropriate), and to provide assistance as necessary. The home base contact should have all the necessary information about the visit. See Model form 9 in Chapter 11 for a suggested checklist for the home base contact.



Emergency procedures framework

241. All those involved in the educational excursion, including supervisors, participants and their parents, should be informed of who will take charge in an emergency, the named back up cover and what they are expected to do in an emergency, and that the local authority has arrangements in place for dealing with emergencies. This information might be provided in small card format which can be carried at all times during the excursion.

Emergency procedures framework during the visit

242. If an emergency occurs on an excursion the main factors for leaders to consider include the need to:

- establish the nature and extent of the emergency as quickly as possible;
- ensure that all the group are safe and looked after;
- establish the names of any casualties and get immediate medical attention for them;
- ensure that all group members who need to know are aware of the incident and that all group members are following the emergency procedures;
- ensure that a leader accompanies casualties to hospital and that the rest of the group are adequately supervised at all times and kept together;
- notify the police if necessary;
- notify the British Embassy/Consulate if an emergency occurs abroad;
- inform the home base contact. The home base contact number should be accessible at all times during the visit;
- collect details of the incident to pass on to the establishment, which should include: nature, date and time of incident; location of incident; names of casualties and details of their injuries; names of others involved so that parents can be reassured; action taken so far, including where casualties have been taken; action yet to be taken (and by whom);
- notify insurers, especially if medical assistance is required (this may be done by the home base contact);
- notify the provider/tour operator (this may be done by the home base contact);
- write down accurately and as soon as possible all relevant facts and witness details and preserve any vital evidence;
- keep a written account of all events, times and contacts after the incident;
- complete an accident report form as soon as possible. Contact HSE or local authority inspector, if appropriate;
- ensure that no-one in the group speaks to the media. Names of those involved in the incident should not be given to the media as this could cause distress to their families. Media enquiries should be referred to a designated media contact in the home area;

- ensure that, although group members may wish to reassure parents etc individually, they are discouraged from making direct telephone or other forms of contact in the immediate aftermath of an incident. At that stage full details may not be available and inaccurate information might cause unnecessary speculation and anxiety for relatives and others at home;
- ensure that nobody in the group discusses legal liability with other parties.

Emergency procedures framework for home base

243. Prior to the excursion, the name and 24 hour telephone numbers of a home base contact should be identified. It is advisable to arrange a second home base contact as a reserve. Local authority establishments will normally have an authority named person as well. Heads of establishments and group leaders should bear in mind that the contact lines may become busy in the event of an incident and that alternative numbers to ring would be useful.

244. The main factors for the home base contact to consider include the need to:

- ensure that the group leader is in control of the emergency and establish if any assistance is required from the home base or local authority;
- contact parents. Details of parents' contact numbers need to be available at all times while the group is on the excursion. The home base contact should act as a link between the group and parents. Parents should be kept as well informed as possible at all stages of the emergency;
- liaise with local authority. The home base contact should act as a link between the group and the local authority and arrange for the group to receive assistance, if necessary;
- ensure, if the group is abroad, that the local police at home are informed;
- liaise with the authority's media contact. If a serious incident occurs, the home base contact should liaise with the designated media contact as soon as possible;
- report the incident using appropriate forms, if necessary. Some incidents are reportable under the *Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1995 (RIDDOR)*. For further information see Annex A.

Media contact

245. Education authorities usually have a designated person to deal with media enquiries for their establishments. The media contact should liaise with the home base contact, the group leader and, where appropriate, the emergency services. In the event of an emergency all media enquiries should be referred to the media contact. The name of any casualty should not be given to the media.



After a serious incident

- 246.** It is not always possible to assess whether group members not injured or directly involved in the incident have been traumatised or whether other participants or staff in the establishment have been affected. In some cases reactions do not surface immediately. Establishments in this situation have sometimes found it helpful to contact local community support services and to seek professional advice on how to help individuals and the establishment as a whole cope with the effects of a tragedy.
- 247.** Following any serious incident in which an authority'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. Any lessons to be learned should be incorporated into risk assessments, operating procedures and emergency planning arrangements.

Chapter 11

Model forms



Most, if not all, local authorities will have their own forms, which reflect their own policy on excursions. Heads of establishments should use these.

The forms included in this chapter are based on existing forms from a variety of sources. Heads of establishments and others who do not have access to local authority documents may find the forms useful as they stand – in which case they are free to photocopy them – or as a model to be worked on.



Model form 1 Application for the approval of educational excursions by head of establishment or local authority

(First check whether your local authority has its own standard form)

Not all sections will be relevant to every proposed excursion:

Establishment/Group: _____

Group Leader: _____

The group leader should complete this form as soon as possible once the preparations are complete. The group leader should have already received approval of the proposed excursion in principle and should have regularly updated the head of establishment on the progress of the preparations. The group leader should obtain parental consent (see Model form 7).

When approval is given, one copy should be retained by the head of establishment and another by the group leader. The head of establishment should be informed of any subsequent changes in planning, organisation or staffing. If required, the head of establishment should seek approval from the local authority.

1. Purpose of excursion and specific educational objectives:

2. Places to be visited:

3. Dates and times:

Date of departure: _____ Date of return: _____

Time: _____ Time: _____

4. Transport arrangements: Include the name of the transport company and vehicle registration number(s).

5. Organising company/agency (if any): Include licence reference number if the body is registered with the Adventure Activities Licensing Authority.

Name: _____ Address: _____

Tel: _____ Licence No if registered: _____

6. Proposed cost and financial arrangements:

7. Insurance arrangements for all members of the proposed party, including voluntary helpers: Include the name of the insurance company.

Insurance Cover: _____ Policy No: _____

Tel: _____

8. Accommodation to be used:

Name: _____ Address: _____

Tel: _____

9. Details of the programme of activities:

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

11. Names, relevant experience, qualifications and specific responsibilities of staff accompanying the party:



12. Names, relevant qualifications and specific responsibilities of other adults accompanying the party:

13. Names, address and telephone number of the contact person in the home area who holds all information about the visit or journey in case of an emergency:

14. Existing knowledge of places to be visited and whether an exploratory visit is intended:

15. Size and composition of the group:

Age range:

Number of boys: _____ Number of girls: _____

Number of male staff: _____ Number of female staff: _____

16. Information on parental consent:

Information on whether the group leader has received all consent forms duly completed and signed (parental consent may precede or follow approval):

Please attach copy of information sheet sent to parents, the parental consent form, and the risk assessment form.

17. Names of pupils with additional support or medical needs:

Signed: _____ Date: _____

Group leader full name: _____

Model form 2 Confirmation from head of establishment for excursion to go ahead

To be completed by the head of establishment

1. I have studied this application and am satisfied with all aspects including the planning, organisation and staffing of this excursion. Approval is given.
 - a. Please ensure that I have all relevant information including a final list of group members, details on parental consent and a detailed itinerary at least seven days before the party is due to leave.
 - b. Your report and evaluation of the excursion including details of any incidents should be with me as soon as possible but no later than 14 days after the party returns.

Signed: Date: _____

Head of establishment full name: _____

A copy of the completed application form and details of any subsequent changes should be retained by the head of establishment. A copy should also be available for the responsible authority.

The form may be modified where approval is sought from the local authority.



Model form 3 Steps to follow when assessing risks

1. Places to be visited e.g. Paris:

Potential hazards:

- e.g.
- walking in city streets
 - travelling by ferry
 - loss of passport
 - unsuitable hotel

2. List groups of people who are especially at risk from the significant hazards you have identified:

- e.g.
- pupils
 - non-teaching staff
 - students
 - teachers
 - group leader

3. List existing controls or note where the information may be found:

- e.g.
- ensure sufficient supervision
 - know details of Consulate
 - clear guidance to participants
 - exploratory visit

4. How will you cope with the hazards which are not currently or fully controlled under (3)?

List the hazards and the measures taken to control them.

5. Continual monitoring of hazards throughout excursion:

Adapt plans and then assess risks as necessary.



Model form 5 Evaluation of the excursion to be completed by the group leader for future reference

| | |
|--------------------------|---|
| School/Youth etc Group: | |
| Group Leader: | |
| Number in Group: | Boys: Girls: Supervisors: |
| Date(s) of Excursion: | |
| Purpose(s) of Excursion: | |
| Venue: | |
| Commercial Organisation: | |

Please comment on the following features on next page:

| | Rating out of 10 | Comment |
|---|-----------------------------|----------------|
| 1. The Centre's pre-excursion organisation: | | |
| 2. Travel arrangements: | | |
| 3. Content of education programme provided: | | |
| 4. Instruction: | | |
| 5. Equipment: | | |
| 6. Suitability of environment: | | |
| 7. Accommodation: | | |
| 8. Food: | | |
| 9. Evening activities: | | |
| 10. Courier/Representative: | | |
| 11. Other comments and evaluation including "close calls" not involving injury or damage: | | |

Signed: _____ Date: _____

Group leader's full name: _____

To be detached and completed after all ventures and logged in the establishment's central records.



Model form 6 Checklist for participants going on an excursion

| | Answer |
|---|--------|
| Who is the group leader? | |
| Where am I going to visit? | |
| How can I contact my group leader? | |
| How do I use the phone if help is required? | |
| What will be done to keep me safe and secure on the excursion? | |
| What should I do if I get lost or into difficulties when not with the group leader? | |
| What is written in the code of conduct for my excursion? | |
| What do I do to keep my money and valuables safe? | |

For residential visits and exchanges:

Do I know:

Answer

| | |
|--|--|
| The address(es) and telephone number(s) of the place(s) where I shall be staying? | |
| How should I behave (house rules) where I am staying? | |
| Where am I to sleep and where am I to dress? | |
| What do I do if I am worried/unhappy about anything when staying with a host family? | |

Model form 7 Parental consent for a school or similar excursion

(to be distributed with an information sheet giving full details of the excursion)

Establishment/Group:

1. Details of excursion to:

From: _____ Date/Time: _____ To: _____ Date/Time: _____

I agree to _____ (name)

taking part in this excursion and have read the information sheet. I agree to

_____ 's participation in the activities described. I acknowledge the need

for _____ to behave responsibly.

2. Medical information about your child

a. Any conditions requiring medical treatment, including medication? YES/NO

If YES, please give brief details: _____

b. Please outline any special dietary requirements of your child and the type of pain/flu relief medication your child may be given if necessary: _____

For residential visits and exchanges only

c. To the best of your knowledge, has your son/daughter been in contact with any contagious or infectious diseases or suffered from anything in the last four weeks that may be contagious or infectious? YES/NO

If YES, please give brief details: _____

d. Is your son/daughter allergic to any medication? YES/NO

If YES, please specify: _____



e. When did your son/daughter last have a tetanus injection?

I will inform the Group Leader/Head of Establishment as soon as possible of any changes in the medical or other circumstances between now and the commencement of the journey.

3. Declaration

I agree to my son/daughter receiving medication as instructed and any emergency dental, medical or surgical treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities present. I understand the extent and limitations of the insurance cover provided.

Contact telephone numbers:

Work: _____ Home: _____

Home address: _____

Alternative emergency contact:

Name: _____ Telephone number: _____

Home address: _____

Name of family doctor: _____ Telephone number: _____

Address: _____

Signed: _____ Date: _____

Full name (capitals): _____

This form or a copy must be taken by the group leader on the excursion. A copy should be retained by the establishment contact.

Model form 8 Summary of information about pupils etc and adults participating in an excursion

| | |
|-------------------------------------|--|
| Relevant Medical Information | |
| Contact Phone Number | |
| Next-of-kin | |
| Address | |
| Date of Birth | |
| Forename | |
| Surname | |



Model form 9 Emergency contact information

To be completed before the excursion. Copies to be held by the group leader and home base contact.

1. **Establishment/group:** _____

2. **Name of group leader:** _____ Home Phone No: _____

3. **Excursion departure date:** _____

4. **Return information:**

Date: _____ Time: _____ Location: _____

5. **Group:**

Total Number: _____ Adults: _____ Group Members: _____

6. **Do you have an emergency contact list for everyone in the Group?**

(If no, obtain one. If yes, attach it to this sheet.)

7. **Emergency contact information:**

a. During normal hours

Head of establishment: _____ Tel: _____

Deputy/other: _____ Tel: _____

b. Out of normal hours:

Head of establishment: _____ Tel: _____

Deputy/other: _____ Tel: _____

c. Travel Company: _____

Name/Address: _____ Tel: _____ Fax: _____

Travel Company Rep: Name: _____ Tel: _____ Fax: _____

Insurance/Emergency Assistance: _____ Tel: _____ Fax: _____

Hotel: _____

Address: _____ Tel: _____ Fax: _____

Hotel contact (e.g. Rep/Manager):

d. Other emergency numbers: _____

(e.g. telephone tree) _____

Model form 10 Off-site swimming pool checklist

| | YES | NO |
|--|-----|----|
| Is there regular testing of water quality? | | |
| Are accurate signs displayed indicating the depth? | | |
| Is the depth of the water less than 1.5 metres? (If so diving should not be permitted) | | |
| Is there a resuscitator? | | |
| Are the lifeguards trained in use of the resuscitator? | | |
| Is there poolside rescue equipment? | | |
| Are there a poolside telephone and an alarm? | | |
| Is an emergency action plan displayed? | | |
| Are normal operating procedures available? | | |
| Is there constant pool supervision? | | |
| Is the swimming pool room, in the case of an indoor pool, locked when not in use? | | |
| Do the supervisors have current National Pool Lifeguard Qualifications? | | |
| Is the number of participants supervised by one qualified adult fewer than 20? | | |
| Are the changing facilities in keeping with basic hygiene and personal safety? | | |
| Do the participants know not to leave any group member alone at any time in the pool? | | |



Model form 11 Consent form for swimming activities or activities where being able to swim is essential

Consent does not remove the need for group leaders to ascertain for themselves the level of the pupil's swimming ability

Swimming ability

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

1. I would like _____ (name) to take part in the specified excursion and having read the information provided agree to him/her taking part in the activities described.
2. I consent to any emergency medical treatment required by my child during the course of the excursion.
3. I confirm that my child is in good health and I consider him/her fit to participate.

Signed: _____ Date: _____

Full name of parent/guardian: _____

Telephone numbers: _____

Home: _____ Work: _____

Home address: _____

Name, address and telephone number of family doctor: _____

**This form or a copy should be taken by the group leader on the excursion.
A copy should be retained by the establishment contact.**

Annex A – Other guidance

Health and Safety Executive

Guidance to the Licensing Authority on the Adventure Activities Licensing Regulations 1996 (HSC £9)

A Guide to Risk Assessment Requirements – (www.hse.gov.uk/pubns/indg218.pdf)

Avoiding ill health at open farms: Advice to farmers with teachers supplement – Agricultural Information Sheet no.23 (revised 2002)

Five Steps to Risk Assessment – (www.hse.gov.uk/pubns/indg163.pdf)

Adventure activities centres; five steps to risk assessment (£4.50)

Managing Health and Safety: Five Steps to Success – (www.hse.gov.uk/pubns/indg275.pdf)

Managing Health and Safety in Swimming Pools revised edition 1999 (HSC 179 £10.50)

Reducing Risk Protecting People 2001

Adventure Activities Industry Advisory Committee (AAIAC): *Statement of Risk Perception in Adventure and Outdoor Activities*

Everyone's Guide to RIDDOR 95 – HSE31 – free leaflet or available in priced packs. ISBN 0 7176 1077 2

Others

The Administration of Medicines in Schools – Scottish Executive Education Department – (www.scotland.gov.uk/library3/education/amis-00.asp)

For guidance on Farm Visits, see Scottish Executive website – (www.scotland.gov.uk/library5/health/ecsip-00.asp)

Work Experience: A Guide to Promoting Quality and Work Experience: Case Studies of Scottish Schools – (www.ltscotland.org.uk/edresources/publications.asp?cat=pub&educationkey+Enterprise%20in%20Education)

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

Safe Practice in Physical Education – The British Association of Advisers and Lecturers in Physical Education – (www.baalpe.org/publications.htm)

Information about adventure activity providers covered by the Adventure Activities Licensing Scheme – (www.aala.org.uk)

Self Assessment and Guidance – Adventure Activities Licensing Authority (AALA) – (www.aala.org.uk)



The Wales Tourist Board, VisitScotland and the British Activity Holiday Association provide voluntary inspection schemes to complement licensing for providers of activities that are out of scope of licensing

Get Safe for Summer – Amateur Swimming Association – (www.asa-awards.co.uk)

Safety on British Beaches – Joint publication by the Royal Life Saving Society and the Royal Society for the Prevention of Accidents (RoSPA) £13.49. Available from RoSPA

Safe Supervision for Teaching and Coaching Swimming – Amateur Swimming Association and others. 2nd edition 2001 Tel: 01509 618700

Group Safety at Water Margins – Central Council for Physical Recreation – (www.ccpr.org.uk)

Minibus Safety: A Code of Practice – RoSPA and others 2002 – (www.rospa.com/pdfs/road/minibus.pdf)

A Practical Guide to Safe School Trips – Scottish School Board Association – (www.schoolboard-scotland.com)

Guidance published by the National Governing Bodies (NGBs) for various adventure activities. NGBs also maintain leader training and assessment programmes

Safe and Responsible Expeditions and Guidelines for Youth Expeditions – Young Explorers' Trust, c/o RGS-IBG Expedition Advisory Centre. £5 inc. p & p or free from website – (www.rgs.org/eacpubs)

The Royal Geographical Society (with IBG)'s Expedition Advisory Centre, 1 Kensington Gore, London SW7 2AR provides advice, information and training to anyone planning an overseas expedition. Tel: 020 7591 3030 – (www.rgs.org/eac)

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

Guidance is produced by many of the voluntary youth organisations

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

The Waterways Code (leaflet) and *The Waterways Code for Boaters* (video) are available from British Waterways – hq@britishwaterways.co.uk – Tel: 01923 201120

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

Address details for listed Government publications

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

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

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



Annex B – Useful contacts

Government Departments

Scottish Executive Education Department
Schools Division
Victoria Quay
Edinburgh
EH6 6QQ
Tel: 0131 244 0943
www.scotland.gov.uk

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

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

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

HSE Infoline

Tel: 08701 545500

or write to:

HSE Information Centre
Caerphilly Business Park
Caerphilly CF83 3GG
www.hse.gov.uk

Home Office
Immigration and Nationality Directorate
Lunar House
40 Wellesley Road
Croydon CR9 2BY
Tel: 0870 606 7766
www.ind.homeoffice.gov.uk

Department of Trade and Industry
1 Victoria Street
London SW1H 0ET
Tel: 0207 2155000

National Governing Bodies and Similar Bodies

Association of British Riding Schools
Queens Chambers
38-40 Queen Street
Penzance
Cornwall TR18 4BH
Tel: 01736 369 440
www.abrs.org

Scottish Equestrian Association
Grange Cottage
Station Road
Langbank
Renfrewshire
PA14 6YB
www.equinesport.org.uk

British Canoe Union
Adbolton Lane
West Bridgford
Nottinghamshire NG2 5AS
Tel: 0115 982 1792
www.bcu.org.uk

Scottish Canoe Association
Caledonia House
South Gyle
Edinburgh
EH12 9DQ
Tel: 0131 317 7314
www.scot-canoe.org

British Cycling
National Cycling Centre
Stuart Street
Manchester M11 4DQ
Tel: 0870 871 2000
www.bcf.uk.com

Annex B – Useful contacts

Scottish Cycling
The Velodrome
Meadowbank Sports Centre
London Road
Edinburgh
EH7 6AD
Tel: 0131 652 0187
www.scuonline.org

The British Horse Society
Stoneleigh Deer Park
Kenilworth
Warwickshire CV8 2XZ
Tel: 08701 202244
www.bhs.org.uk

British Mountaineering Council
177-179 Burton Road
Manchester M20 2BB
Tel: 0161 445 4878
www.thebmc.co.uk

The Mountaineering Council of Scotland
The Old Granary
West Hill Street
Perth
PH1 5QP
Tel: 01738 638227
Fax: 01738 442095
www.mountaineering-scotland.org.uk

Snowsport Scotland
Hillend
Biggar Road
Edinburgh
EH10 7EF
Tel: 0131 445 4151
Fax: 0131 445 4949
www.snowsportscotland.org

Mountain Leader Training Scotland
Glenmore Lodge
Aviemore
Inverness-shire
PH22 1QU
Tel: 01479 861248

National Caving Association
Ffrancon Annexe
Thornton in Lonsdale
Ingleton
Carnforth
Lancashire LA6 3PB
Tel: 01524 241 737

Association for Outdoor Learning
12 St Andrew's Churchyard
Penrith
Cumbria
CA11 7YE
Tel: 01768 891065
www.sportsteacher.co.uk

Royal Yachting Association Scotland
Caledonia House
South Gyle
Edinburgh
EH12 9DG
Tel: 0131 317 7388
www.ryascotland.org.uk

Scottish Orienteering Association
Glenmore Lodge
Aviemore
Inverness-shire
PH22 1QU
Tel: 01479 861713
www.scottishorienteering.org

Scottish Rafting Association
Lowport Centre
Blackness Road
Linlithgow
EH49 7HJ
Tel: 01506 775390

Trekking and Riding Society of Scotland
Bruaich-na-h'abhainne
Maragowan
Killin
Perthshire FK21 8TN
Tel: 01567 820909
www.ridinginScotland.com



Unions and Associations

The Educational Institute for Scotland
46 Moray Place
Edinburgh
EH3 6BH
Tel: 0131 225 6244
www.eis.org

Scottish Secondary Teachers Association
15 Dundas Street
Edinburgh
EH3 6QG
Tel: 0131 556 5919
www.ssta.org.uk

NASUWT
6 Waterloo Place
Edinburgh
EH1 3BG
Tel: 0131 523 1110
www.nasuwat.org.uk

Professional Association of Teachers
Scotland
1-3 Colme Street
Edinburgh
EH3 6AA
Tel: 0131 220 8241
www.pat.org.uk

Headteachers Association of Scotland
University of Strathclyde
Jordanhill Campus
Southbrae Drive
Glasgow
G13 1PP
Tel: 0141 9503298

Association of Headteachers in Scotland
University of Dundee
Gardyne Road Campus
Dundee
DD5 1NY
Tel: 01382 458802
www.ahts.org.uk

Catholic Headteachers Association of
Scotland
John Ogilvie High School
Farm Road
Hamilton
ML3 9LA

Others

Adventure Activities Licensing Authority
17 Lambourne Crescent
Llanishen
Cardiff CF4 5GG
Tel: 029 20755715
www.aala.org

Association of British Travel Agents (ABTA)
68-71 Newman Street
London W1T 3AH
Tel: 0207 637 2444
www.abta.com

The British Activity Holiday Association
22 Green Lane
Hersham
Surrey, KT12 5HD.
Tel/Fax: 01932 252994
www.baha.org.uk

Scottish Activity Holiday Association
c/o Rua Reidh Lighthouse
Melvaig
Gairloch IV21 2EA
Tel: 01445 771263
www.activity-scotland.org.uk

British Association of Advisers and
Lecturers in Physical Education (BAALPE)
University College
Henwick Grove
Worcester
WR2 6AJ
Tel: 01905 855584
www.baalpe.org

Annex B – Useful contacts

British Council
10 Spring Gardens
London
SW1A 2BN
Tel: 0161 9577755 (Information Centre)

British Safety Council
National Safety Centre
70 Chancellors Road
Hammersmith
London W6 9RS
Tel: 0208 741 1231
www.britishsafetycouncil.org

British Schools Exploring Society
1 Kensington Gore
London SW7 2AR
Tel: 0207 591 3141
www.bses-expeditions.org.uk

Confederation of Passenger Transport UK
Imperial House
15-19 Kingsway
London WC2B 6UN
Tel: 0207 240 3131
www.cpt-uk.org

The Duke of Edinburgh's Award (Scotland)
69 Dublin Street
Edinburgh EH3 6NS
Tel: 0131 556 9097
www.theaward.org

The Maritime & Coastguard Agency
MCA Infoline
Tutt Head
Mumbles
Swansea
Infoline Tel: 0870 6006505
www.mcga.gov.uk

Medical Advisory Service for Travellers
Abroad (MASTA)
Moorfield Road
Leeds LS19 7BN
Tel: 0113 238 7575
Travellers Health Line: 0906 8224 100
www.masta.org

National Association of Field Studies
Officers
CEES Stibbington Centre
Church Lane
Stibbington
Peterborough PE8 6LP
Tel: 01780 782 386
www.nafso.org.uk

Scottish Advisory Panel for Outdoor
Education
Abbey House
8 Seedhill Road
Paisley
PA1 1JT
Tel: 0141 840 3800

Royal Life Saving Society UK
River House
High Street
Broom
Warwickshire B50 4HN
Tel: 01789 773 994
www.lifesavers.org.uk

The Royal Society for the Prevention of
Accidents (Scotland)
Slateford House
53 Lanark Road
Edinburgh
EH14 1TL
Tel: 0131 455 7457
Fax: 0131 443 9442
www.rospea.com

The Royal Society for the Prevention of
Accidents
Edgbaston Park
353 Bristol Road
Birmingham B5 7ST
Tel: 0121 248 2000
www.rospea.com

School and Group Travel Association
Katepwa House
Ashfield Park Avenue
Ross-on-Wye
Herefordshire HR9 5AX
Tel: 01989 567 690



School Journey Association
48 Cavendish Road
London SW12 0DG
Tel: 0208 675 6636

Scottish School Board Association
30 Newall Terrace
Dumfries
DG1 1LW
Tel: 01387 260428
www.schoolboard-scotland.com

Scottish Parent Teacher Council
53 George Street
Edinburgh
EH2 2HT
Tel: 0870 706 5814
www.sptc.info/

sportscotland
Caledonia House
South Gyle
Edinburgh EH12 9DQ
Tel: 0131 317 7200
www.sportscotland.org.uk

sportscotland National Centre
Glenmore Lodge
Aviemore
Inverness-shire
PH22 1QU
Tel: 01479 861256
www.glenmorelodge.org.uk

sportscotland National Centre
Cumbrae
Isle of Cumbrae
Ayrshire
KA28 0HQ
Tel: 01475 530757
www.nationalcentrecumbrae.org.uk

sportengland
3rd Floor
Victoria House
Bloomsbury Square
London
WC1B 4SA
Tel: 08458 508508
www.sportengland.org

VisitScotland
23 Ravelston Terrace
Edinburgh EH4 3EU
Tel: 0131 332 2433
www.visitscotland.com

Loch Lomond and The Trossachs National
Park
National Park Headquarters
The Old Station
Balloch Road
Balloch
G83 8BF
Tel: 01389 722600
Fax: 01389 722633
www.lochlomond-trossachs.org

Cairngorms National Park Authority
14 The Square
Grantown-on-Spey
PH26 3HG
Tel: 01479 873535
Fax: 01479 873527
www.cairngorms.co.uk

Snowdonia National Park Authority
Youth and School Liaison Officer
Education Service
Plas Tan y Bwlch Study Centre
Maentwrog
Blaenau Ffestiniog
Gwynedd
LL41 3YU
Tel: 01766 772600

Annex B – Useful contacts

Sports Council for Wales
Sophia Gardens
Cardiff CF11 9SW
Tel: 02920 300 500
www.sports-council-wales.co.uk

The Suzy Lamplugh Trust
PO Box 17818
London SW14 8WW
Tel: 0208 8760305
www.suzylamplugh.org

Scottish Youth Hostel Association
National Office
7 Glebe Crescent
Stirling
FK8 2JA
Tel: 01786 891400
www.syha.org.uk

Wales Tourist Board
Brunel House
2 Fitzalan Road
Cardiff CF24 0UY
Tel: 02920 499909
www.wtbonline.gov.uk



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