



Education Procedure Manual 3/17

EDUCATIONAL EXCURSIONS AND OFF-SITE VISITS

**For
Teachers and Employees on Scottish Negotiating Committee
for Teachers (SNCT) Conditions of Service**

Effective from: March 2024

Education, People & Business



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Version Control History

Version No.	Effective Date	Details of change from previous version	Date Approved	New version no.
-	Jun 2014	Updated to new template Revised to ensure all guidance/regulations are current	15/03/2024	1.0

GDPR Statement

East Dunbartonshire Council holds, uses and processes information in accordance with the General Data Protection Regulations and all other relevant national data protection laws. Further information detailing how East Dunbartonshire holds and uses personal information and copies of privacy notices used throughout the Council are available on our [website](#).

Policy Review Statement

This policy will be reviewed in line with:

- Legislative Change
- Changes to SNCT National Conditions of Service
- Other external factors
- Feedback on the effectiveness of the policy
- Requests for review by Elected Members, Trade Unions and/or Management.

1.0 Purpose

- 1.1 The purpose of this procedure manual is to further promote the educational, personal and social benefits of such excursions and to update the various procedures in line with current best practice. The approach taken is not only central to the achievement of safe and enjoyable excursions but also provides support and reassurance for staff managing such visits.
- 1.2 In addition, this manual aims to reduce exposure to risk by providing employees with information on good practice, and providing clarity on planning and organisation, ensuring that the management of risk is intrinsic to what we do.

2.0 Scope

- 2.1 This document should be followed by all employees and volunteers involved in planning and leading off-site visits on behalf of East Dunbartonshire Council (EDC). It makes clear to all parties involved in a visit the responsibilities that each will have to ensure the visit, of any type, will take place safely and be as well organised as reasonably possible.
- 2.2 The combined guidance of Going Out There and East Dunbartonshire Council Educational Excursions and Off - Site Visit Guidance is relevant to any occasion in which children, young people or clients (where East Dunbartonshire Council is deemed to have a duty of care) leave their site or facility for any activity or visit whilst legally in the care of an East Dunbartonshire Council establishment. However, some social work activity, work experience and pupil attendance at alternative education establishments is not deemed an excursion and other planning arrangements are in place. If clarification is required, please contact EDC Outdoor Education and Awards Officer.

3.0 References & Related Documentation

- 3.1 The following documents should be referenced when considering this procedure:
 - [SNCT Handbook](#)
 - [Equality Act 2010](#)
 - [EVOLVE](#) Excursion Management system for ALL trips. ALL documentation relating to your trip or excursion must be uploaded on to EVOLVE. Generic risk assessments are available in Evolve
 - [Going Out There](#): This is the main planning resource. It provides a toolkit for ALL categories of trips. Details can be found on Page 3 of the “Going Out There” document
 - [Health and Safety forms](#)
 - [Accident & Reporting Procedures](#)
 - [Child Protection](#)
 - [Disclosure Scotland](#)
 - Form EV3
 - Form PM3/17/F01: Residential Trip Request (>£500)

4.0 Procedure for Planning an Excursion

Before an excursion is planned the Visit Leader should consider risk management around the proposed excursion and research the trip considering dates, costs and providers, before following the bulleted steps for the category of the trip. Cognisance should also be made to sections 6.0 - 28.0

A flowchart summary of planning for an excursion is available in [Appendix 1](#).

Category 1 and 2: Day trip / Team travel from school locality

- Initial approval required by Head Teacher / Head of establishment
- Confirm booking and log on EVOLVE. Information logged includes staff, young people names, risk assessments, medical needs, ASN, first aid provision, parental letters and booking documents.
- Submit through EVOLVE school coordinator
- Head Teacher / Head of establishment approves
- EV3 forms must be completed and added to EVOLVE

Category 3 and 4: UK residential / Overseas excursions

- Pre-Approval required for trip costs over £500 per head - must be submitted to Chief Education Officer. For a residential trip a SAMPLE trip request form is given in [Appendix 2: PM 3/17/F01: Residential Trip Request Form \(SAMPLE\)](#)
- Costs under £500 per head - initial approval required by Head Teacher / Head of establishment
- Initial approval required by Head Teacher / Head of establishment
- Confirm booking and log on EVOLVE. Information logged includes staff, young people names, risk assessments, medical needs, ASN, first aid provision, parental letters and booking documents.
- Submit through EVOLVE school coordinator
- Head Teacher / Head of establishment approves
- After Head Teacher / Head of establishment approval, details are automatically sent to the authority to be reviewed and then approved
- **Category 3 must be with the LA at least 16 weeks before travel**
- **Category 4 must be with the LA at least 20 weeks before travel**
- EV3 forms must be completed and added to EVOLVE

5.0 EVOLVE (Online planning, recording, approval and monitoring system)

- 5.1 EVOLVE is a well-developed, robust system that is used by an increasing number of local authorities throughout the UK. It supports the two principles of safety and quality in off-site visits and has been tailored to suit specific East Dunbartonshire Council requirements.
- 5.2 On completion of the online sections for a particular visit, a Visit Form is generated which forms the *minimum* Visit Plan as referred to throughout “Going Out There”. This should be supplemented by paper-based planning, if necessary, particularly for more challenging visits, destinations, and activities, where internet access is not available. Leaders should also always carry a paper copy of the Group List.

- 5.3 All off-site visits that involve transport, overnight stays or adventurous activities must be recorded on EVOLVE. Other visits can also be recorded on EVOLVE, but as a minimum must follow the routine off-site visit checklist with Head of Establishment approval. ALL documentation relating to the trip or excursion must be uploaded on to EVOLVE.

6.0 Opportunities for All

- 6.1 It is important that all educational excursions or activities are accessible and suitable for all who may wish to participate, irrespective of their medical needs, physical ability, gender, ethnic origin, religious or social background. There has been a strengthening of the rights for fair inclusion as defined under the [Equality Act 2010](#)
- 6.2 There are a wide range of suitable venues or providers that have the skills and facilities to allow access for all. Leaders need to consider the suitability of the providers or venues they wish to use at a very early stage in their planning.

7.0 Cost of the School Day

- 7.1 According to figures from [The Child Poverty Action Group](#) more than 1 in 4 young people live in poverty. Excursions should be planned to ensure that children and young people affected by poverty are supported through subsidised costs to ensure that an excursion is accessible. Overall costs per head should be considered at the planning stage. To reduce costs fund raising activities should be considered by establishments for residential trips, particularly overseas trips to make them inclusive. Pupil equity funding should be used appropriately to support children and young people.

8.0 Support for Children and Young People

For school pupils who are eligible for free school meals the education service will provide a subsidy to schools to support attendance on a residential visit to an Outdoor Centre. The subsidy will be available once per year to eligible pupils who attend an Outdoor Centre in any of the following years: P6 or P7 and S1 or S2, this only available once in primary year groups and once secondary year groups. The subsidy available is currently £140 per eligible pupil. Costs above this will need to be met by the parents, Parent Council or the establishment. For further information, contact Education Finance Officer (Telephone 0300 123 4510)

9.0 Legal Background

- 9.1 There are various Acts and Regulations that place requirements and standards upon those providing excursions or activities for young people. Since 1974, with the introduction of the Health and Safety at Work Act, it has been a requirement for all employers to ensure, 'so far as reasonably practicable', the health, safety and welfare of those it employs and anyone who may be affected by their activities. It is the statements within sections 2 and 3 of the Act which provide a duty of care to both staff and the young people with whom we work. The introduction of the [Management of Health and Safety at Work Act 1999](#) brought, under [regulation 3](#), the requirement for risk assessments. Other regulations cover the care and provision of any work equipment, personal protective clothing, vehicle or insurance requirements.

10.0 Guidance Overview and References

- 10.1 This document adopts the national framework, [Going Out There](#) for the safety and management of off-site visits managed by East Dunbartonshire Council. This framework has been developed in partnership by the Scottish Government, the Health and Safety Executive (HSE), the Scottish Advisory Panel for Outdoor Education, (SAPOE). Education Scotland and the Association of Directors of Education, with input from other partners including voluntary organisations and providers. The Scottish Government have given SAPOE the responsibility for maintaining and implementing the 'Going Out There' guidance.
- 10.2 EDC guidance is designed to complement "Going Out There" by providing information and procedures that are specific to East Dunbartonshire Council as referenced in the national guidance. These procedures emphasise the principles of thoughtful planning, detailed preparation, and competent supervision, clear-cut lines of responsibility, effective communications and workable contingencies. The framework for the guidelines continues to be derived from the two broad legal requirements of common law duty of care and the statutory Health and Safety at Work Regulations. The legislation on child protection and inclusion provide further support in the organisation of safe, inclusive and purposeful visits.
- 10.3 The national guidance embraces the Health and Safety Executive's principles of sensible risk management by seeking a balanced view that considers both the benefits and risks associated with visits and activities. East Dunbartonshire Council works in partnership with national agencies through the SAPOE membership to keep this guidance up to date. Establishments must adopt this guidance in full and review and update local procedures to ensure they reflect the guidance in this document. In addition, the planning and management of visits is done through the EVOLVE online system and the content of submissions should reflect the guidance described here.
- 10.4 This Procedure Manual is based on the presumption that parental consent is required for all those under 18 years of age, or still attending school, unless a Visit Leader has reasonable grounds for allowing a 16 or 17 year old to sign their own consent form, subject to discussion with their parents/carers.
- 10.5 Staff are reminded that the Visit Leader is tasked with the planning, the application for approval and the management of a visit with the support and advice of senior colleagues. The Head of Establishment has overall responsibility for each visit and must ensure that their leaders are not only competent but also fully involved with planning and leading the visit from beginning to end.

11.0 Roles and Responsibilities

- 11.1 Under the Health and Safety at Work 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.

11.2 Heads of Establishment

11.2.1 Heads of Establishment are expected to follow and implement this guidance to ensure that outdoor learning experiences and off-site visits can occur frequently and regularly and are managed safely. Heads of Establishment should ensure that the Visit Leader is competent to manage and monitor the risks throughout the visit. They should also ensure that:

- Appropriate child protection procedures are in place
- An appropriate risk assessment has been completed and proportionate safety measures are in place
- The needs of the staff and participants, including training needs, have been considered
- Parents have been appropriately informed
- The Visit Leader and accompanying adults have suitable experience, competencies and, where required, qualifications and Disclosure Scotland checks for the visit
- Visit Leaders are allowed sufficient time to organise visits properly
- Visit Assistants and other accompanying adults in a supervisory role are appropriately recruited and briefed
- The ratio of other accompanying adults to participants is appropriate
- The Employer has approved the visit, if appropriate
- Arrangements have been made for the medical needs and additional support needs of all the participants
- The Employer's policy on the administration of medicines has been followed
- Adequate first aid provision will be available
- The mode of travel and travel arrangements are appropriate
- There is adequate and relevant insurance cover in place
- Suitable contact arrangements are in place
- The emergency arrangements are in place and have been communicated to those who need to know
- There is a contingency plan, with clear lines of responsibility, which will cover incidents such as adverse weather, travel delays including a late return home

11.2.2 Visit Leaders

- Having overall management responsibility during the visit – even if they are not physically supervising a part of the visit
- Preparing a Visit Plan
- Obtaining approval of the Visit Plan from the Head of Establishment
- Following Employer policies and guidelines
- Ensuring adequate insurance cover is in place
- Ensuring good communication with parents, participants and accompanying staff
- Matching the off-site visit to the needs and abilities of all participants being mindful of equality and inclusion
- Obtaining sufficient information about participants to deal with any medical or behavioural needs

- Adequate first aid provision will be available
- Ensuring that any outside provider has relevant information about participants
- Appointing and briefing Visit Assistants, deputies and other adult supervisors where appropriate
- Being able to control, lead and instruct participants of the relevant age range
- Being trained in child protection issues

11.2.3 Assisting Staff

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

11.2.4 Parents

- Provide the Visit Leader with emergency contact numbers
- Give consent or inform the establishment if they decide to opt out
- If necessary, give the Visit Leader additional up to date information about their child's emotional, mental/psychological and physical health
- Prepare their child for the visit, especially when the establishment has identified the need for different clothing, rules and eating arrangements.

12.0 Technical Advice

Further advice available	Contact
For ALL types of excursions	EDC Outdoor Education and Awards Officer
Insurance	EDC Corporate Risk Adviser
Health & Safety	EDC Health & Safety Officer

Table 1: Important Contacts

13.0 Terminology

13.1 **Employer** is East Dunbartonshire Council

13.2 **Head of establishment** is the Head Teacher within a school, nursery or individual with responsibility for the day-to-day running of the council setting

13.3 **Visit leader** is responsible to the Head of Establishment and is the person with the main supervisory responsibility for leading participants in an outdoor experience or on an off-site visit. They are responsible for the young people before, during and after the off-site activity. The Visit Leader is responsible for the detailed organisation of the excursion according to the policies and procedures of East Dunbartonshire Council. They will present their plans to the Head of Establishment for approval

- 13.4 **Visit Assistant** carries out supervisory duties as instructed by the Visit Leader. They are an adult with responsibility for supervising participants during the visit and also, where specified, may be delegated to deputise for the Visit Leader in an emergency situation
- 13.5 **Technical Expert** in the context of East Dunbartonshire Council is a nominated individual with the skills, knowledge and responsibility to oversee and manage offsite visits
- 13.6 **Parent / Guardian / Carer** is the parent / legal guardian /carer of the young person attending the visit
- 13.7 **Participants** are the children, young persons or clients as appropriate
- 13.8 **Provider** is a person, organisation or business responsible for the delivery of a service or activity to a group of young people
- 13.9 **Ratios** – the appropriate number of staff to pupils for a visit is determined by the Risk Assessment.
- 14.0 **Consent**
- 14.1 Parental/ Guardian consent for the majority of off-site visits can be obtained annually. If annual consent has been organised for One-off day visits, specific information should still be provided to parents and should include:
- the aims and benefits
 - the activity and its learning objectives
 - the venue
 - travel arrangements
 - insurance cover and supervision arrangements
- 14.2 Specific consent must be obtained for any visit that involves an adventurous or hazardous activity, transport, overnight stay or overseas trip. **Consent for all visits/trip should only be done on a EV3 form**
- 15.0 **Approval of visits**
- 15.1 East Dunbartonshire Council has adopted the categorisation of visits and the level of approval delegation recommended in Going Out There This will ensure, as far as reasonably possible, that risk management approval is made by managers who best know the participants and staff involved. The arrangements for gaining approval are through satisfactory completion and submission of an EVOLVE visit form selecting every applicable visit type e.g. Duke of Edinburgh (DofE) expeditions would select residential and adventurous.

Table 2: Categorisation of Trips and Approval Delegation, below, provides more details.

Type of excursion	Activities	Approval and notification
Category 1	Curricular activities which take place off site but in the local proximity of the school e.g. timetabled football practices on a pitch across from the school.	Use EVOLVE (see note 1) Approval by Head of establishment. Parental Consent is only needed if the young person is working on their own initiative without a teacher or staff member in close proximity (See note 2)
Category 2	Team travel & away games and all extra-curricular activities, during or out with school hours. Day excursions or off-site activities away from the locality of the school that include hazards normally encountered in daily life. For example, visits to museums, theatres, country parks. (See notes 3+4)	Use EVOLVE (see note 1 & 2) Approval by Head of Establishment. Parental Consent (EV3)
Category 3	All UK residential and overnight visits. All non-adventurous overseas visits and exchanges (See note 4). All Adventurous Activities led by EDC approved & AALA licensed outdoor providers (See note 4).	BEFORE CONFIRMING any booking, which is over £500 per person approval is required from the Chief Education Officer Approval form can be found in EVOLVE. Use EVOLVE approval by Head of Establishment. Parental Consent (EV3) Schools must have EVOLVE approval sent to the LA at least 16 weeks in advance. (See note 5)
Category 4	Overseas expeditions, trekking and Adventurous Activities (See notes 4 & 5). All Adventurous Activities led by EDC staff or volunteers (See notes 4 & 5). Duke of Edinburgh Expeditions (See note 6).	BEFORE CONFIRMING any booking, which is over £500 per person approval is required from the Chief Education Officer Approval form can be found in EVOLVE. Use EVOLVE approval by Head of Establishment. Parental Consent (EV3) Schools must have EVOLVE approval sent to the LA at least 20weeks in advance. (see note 6)

Table 2: Categorisation of Trips and Approval Delegation

- Note 1: The Head of Establishment requires to authorise through EVOLVE for regular off site activities A term, block of sessions or a particular site can be assessed and approved on EVOLVE. For example, a school may regularly use a playing field across the road from the school
- Note 2: The establishment can obtain permission from parents for a block of activities or games if they are of a similar nature. For example, a number of sports fixtures. The information letter should contain details regarding the planned venues, transport arrangements, staff involved and emergency contact details. It should also state how changes to fixture or venues will be communicated to parents. This could be via additional letters, the school website or notice boards.
- Note 3: The Head of Establishment will need to decide which venues fall into the local area of the school and if parental consent is needed for a specific excursion of whether a block consent can be taken. The use of transport can be a useful indicator, but this is not always the case. The Head of Establishment can decide to make limited use of combined information and consent letters for local, low risk, regular excursions as set out in the section 4.2 Communicating with Parents.
- Note 4: Please contact the Outdoor Education officer and awards officer to discuss any provider you are unsure about. Adventurous Activities led by AALS licensed companies have been checked by the inspectors and EDC is able to pass on a level of responsibility to the organising company who will maintain their safety standards of the activities as per their licence. A list of licensed providers can be checked via the AALS website.
- Note 5: Within EDC there is a need to ensure that high risk activities are run in accordance with internal activity procedures and the conditions of the AALS licence (Adventurous Activities Licensing Service). Notification of all adventurous activities delivered by EDC staff, Duke of Edinburgh expeditions and overseas expeditions must therefore be sent to the appropriate Chief education Officer. The Outdoor Education an Awards Officer can provide support for this as necessary.
- Note 6: To allow the Education service to monitor the outdoor activities, residential and overseas trips that are taking place, schools must: Have sought approval in principle from the authority before confirmation of any booking through travel provider/ travel agent.

Send EVOLVE approval from the Head Teacher to the Local Authority for Category 3 excursions and activities. Send EVOLVE approval from the Head Teacher to the Local Authority, for Category 4 excursions and activities.

A hard Copy of East Dunbartonshire Council's Travel Insurance Policy should be taken on all trips. This is available on EVOLVE.

16.0 Deploying Staff

- 16.1 The Health and Safety at Work Act requires employers to make training available for staff to perform their work safely. In addition to professional qualification and general risk management East Dunbartonshire Council will provide specific training at two levels for both Visit Leaders and those overseeing visit safety management across an establishment, the EVOLVE Visit Coordinators (EVC), for those who require training. Staff competence to lead visits should also form part of mentoring and general professional review discussions with line managers as appropriate.
- 16.2 Those who lead groups in an outdoor or adventure activity are required to demonstrate that their experience and competence level matches the risk level of the planned activity. The activity leadership competence matrix illustrates the minimum National Governing Body (NGB) awards, Fife local validations and experience applicable to a range of activities.
- 16.3 EVOLVE provides a staff history of all visits lead or assisted and can record relevant training or qualifications which should follow staff through their EVOLVE account across East Dunbartonshire Council establishments. All staff supervising an adventure activity should upload all relevant qualifications or a leader profile to their EVOLVE account. Management are encouraged to use the visit history when deploying and mentoring staff.

17.0 Risk Assessment

- 17.1 East Dunbartonshire Council has considered the common risks in a range of off-site visits, with best practice control measures being identified. This information is available to all staff as generic risk assessments on the EVOLVE system, which will be revised annually, there are also worked examples available in the “Going Out There” Toolkits. Visit leaders should adapt these generic risk assessments, as appropriate, for their visit. However, any hazards and control measures that are specific to a particular circumstance, can be recorded directly on the EVOLVE visit plan using the **Event Specific Notes** feature.
- 17.2 Any participants, staff or pupils/clients with significant medical or support needs that require additional management arrangements to ensure safety to themselves or others should have their own specific risk assessment / emergency response plan. In some cases this may be included in a child’s care plan where professional medical input is required. The content of these plans should be agreed with all parties involved and a signed copy retained. Consideration should be given as to a personal evacuation plan from accommodation. Participants should not travel, if travelling against medical advice or where conditions are excluded from insurance policies.

18.0 Welfare and Additional Support Needs:

- 18.1 The Head of Establishment must be satisfied that there is sufficient support from leaders within the leadership team to monitor, assist and support all participants with any welfare need and additional support needs and act at all times in accordance with their duties under the Equalities Act 2010.

- 18.2 With East Dunbartonshire Council is not normal practise to have parents of young people on site whilst a residential visit is taking place, but all cases can be looked at individually.

19.0 Establishing ratios

- 19.1 General off-site visit maximum ratios guidance for adult : non adult participants. Specific ratios must be determined by a process of risk assessment considering all factors, an overview of which is shown in table 3, below.

Activity	Age of non-adult participants	Adult : young person ratio	Visit leader competence
Day visits to local easily accessible facilities, countryside and non-challenging environments. Day visits away from local area at secure venue	Early Years	Max 1 : 4	Previous experience and approved by Head of establishment
	Primary	Max 1 : 12	
	Secondary	Max 1 : 16	
Residential Visits	Primary	Max 1 : 12 (minimum 2 adults)	Previous experience and approved by Head of establishment
	Secondary	Max 1 : 12 (minimum 2 adults)	
Overseas Visits	Primary	Max 1 : 10 (minimum 2 adults)	Previous experience and approved by Head of establishment. Final Approval by Outdoor Education and Awards Officer
	Secondary	Max 1 : 10 (minimum 2 adults)	
Adventure activity and all non-secure or challenging environments	All ages	Determine ratio by considering all factors	Previous experience and approved by Head of establishment. Final approval by Outdoor Education and Awards Officer
	Note: Leadership awards and ratios for specific adventure activities vary and can be found in the Activity Leadership Competence Matrix		

Table 3: Maximum Ratio Guidance

20.0 Using an external provider

- 20.1 External Provision is where the provider is not East Dunbartonshire Council Outdoor Education or a qualified employee of East Dunbartonshire Council. The provider may be an independent individual, organisation or centre and may or may not hold an AALS Adventure Activity license within the meaning of the 1995 Act. An 'external provider' is defined as where there is an element of instruction, staffing or guiding.
- 20.2 It may be that the provider is already recognised by East Dunbartonshire Council as an Approved External Provider, in which case a complete vetting process will have been carried out. If not, the Outdoor Education and Awards Officer will screen the provider by auditing their provision on behalf of the Excursion Leader.
- 20.3 Establishments should still take responsibility to check that the location and activities offered are suitable for their group and will meet the aims of the visit. They should check that the provider offers good value for money by comparing what is offered against similar providers. In addition, establishments should seek specialist advice on any concerns arising in relation to the provider by contacting the appropriate Council Officer.
- 20.4 To ensure that parents/carers/staff are protected and can be represented by the Council in the event of any legal action in relation to the contract with the approved provider it is important to ensure that the booking form is signed on behalf of the establishment and not by parents/carers or individual visit leaders.

21.0 Emergency Procedures

- 21.1 Sound planning by the Visit Leader and a logical gathering of appropriate information about personnel, methods of transport, accommodation, activities planned and the excursion itinerary form the basis of good safety procedures. However, it is vital that all plans and information are presented in a clear and accessible manner that will assist easy communication between leaders, excursion participants and home base emergency contacts. Attention to detail at this stage highlights potential problems in good time. The visit plan and accompanying information becomes vital when dealing with an emergency, for example – a comprehensive group list and itinerary, sharing establishment base 24/7 emergency contacts and vehicle breakdown information.
- 21.2 There are four levels of emergency procedures:
- Level 1 **Misfortunes**. Slightly delayed return to home; minor incidents requiring some attention from the leader; no medical attention required; may not require any action unless a late arrival home is likely when a 'phone call should be made to the contact person
 - Level 2 **Minor events** Significantly delayed return; minor injuries requiring medical attention; party still able to extricate itself and return home without outside help; a 'phone call to warn of late arrival is probably all that is required
 - Level 3 **Serious events** Injuries significant but not life threatening; part or all of

the party requires to be 'rescued'; Emergency Services will be involved; management requires to be informed

- Level 4 **Fatal/ near-fatal events.** Emergency Services involved

21.3 Health and Safety legislation and East Dunbartonshire Council require that all accidents and incidents involving employees and others engaged in Council activity, should be investigated and reported to the Council's Corporate Health and Safety team. The Excursion Leader must notify, as soon as possible, the Head of Establishment of any accident, incident, dangerous occurrence, near miss, illness and act of violence that has occurred. It should then be formally reported and processed within 48 hours using the HS1a report form (either directly into first contact from a Council PC or using a paper version of the form that can be input to first contact by the school). A robust system for reviewing incidents allows lessons to be learned and shared.

22.0 Group Lists

22.1 A group list is simply a collation of the names and relevant information of each participant **and members of staff** taking part in the visit. For visits taking place in and around the school grounds and local area a name register is sufficient. For visits that involve transport away from the base, adventure activity, residential and overseas visits the group list should include **Name, age, emergency contact details, medical information.**

22.2 Group lists can be generated directly from SEEMIS. There is a custom report within Click & Go which can be run and copy/pasted into an excel spreadsheet which contains the information above. The report can be accessed by going to Application > Reports > Custom Reports.

22.3 For visits involving larger numbers of participants it is expected that a supervision plan is included in the planning. This involves splitting the whole group into smaller groups of approximately 10 children and clarifies which adults are responsible for each group.

23.0 First Aid

23.1 The provision of first aid should be considered as part of the risk assessment process during the excursion planning phase. It will be subject to a number of considerations such as the age profile of pupils attending, the venue, outdoor environment and the activities involved. A First Aid kit appropriate to the planned activity should be carried on all excursions and staff should know where it is, be aware of its contents and how to use them.

23.2 Where the activities are not adventurous and you have access to a first aider and facilities at the venue visited, there will be no need to take a first aider on the excursion. Where the activities involve a sporting fixture, adventurous activity or hazardous activity there may be a requirement for staff to be first aid trained often defined by National Governing Body requirements.

23.3 Leaders must ensure that an appropriate level of First Aid provision is available before

any excursion is finalised.

24.0 PVG and Vetting

- 24.1 The Council's policy is that anyone doing regulated work with children or protected adults must be a PVG member. Schools should refer to [PVG scheme and disclosures](#).

For example, a volunteer who visits a class once a week and leads a session where the teacher is not always present will be undertaking regulated work, whereas a parent who helps out occasionally on a woodland visit where staff are also present, is not doing regulated work.

- 24.2 Information on the [Disclosure Scotland website](#), and [PM 3/21 Child Protection Policy](#) also explains the concept of regulated work to help organisations to decide which positions fall within the definition.
- 24.3 The Head of Establishment should ensure appropriate management arrangements are in place prior to any visit. This includes the suitability of all staff and volunteers and whether a PVG check has been obtained or not.

25.0 Outdoor, Adventurous and "Extreme" Activities

- 25.1 All activities that take place in potentially hazardous natural environments demand appropriate levels of staff competence and the need to comply with the principles of accepted good practice. Three areas of provision are likely in the context of outdoor excursions:

- 25.1.1 **Internal Provision**, where the Outdoor Education service are responsible for the organisation and instruction of adventure or environmental activities. The Outdoor Education Service holds a Current AALA licence.
- 25.1.2 **Establishment-led Provision** where appropriately trained and qualified Council staff not only organise the visit but also instruct and lead the activities. Leaders should upload evidence of their qualification and experience onto their profile on EVOLVE. Recent involvement in the relevant activity is confirmed when completing the Activity Leader Form on EVOLVE.

Leaders must have all relevant awards and qualifications uploaded to EVOLVE.

- 25.1.3 **External Provision** is where the provider is not the Outdoor Education Service or a qualified employee of East Dunbartonshire Council. The provider may be an independent individual, organisation or centre and may or may not hold an AALA licence.
- 25.2 For further information on Outdoor Activities and competence of staff contact the Outdoor Education and Awards Officer.
- 25.3 In order to decide on whether the visit leader has suitable experience and competency for the planned activity it is useful to consider the location and terrain in which the visit will take place.

- 25.4 Parks, Woodland, paths in local environments generally no more than 1km from vehicular access with no specific hazards can usually be led by any staff member with knowledge of the area and suitably experienced working with groups outdoors. It would not usually require any formal training.
- 25.5 'Open Country' can be defined as land above 300m; more than 1km from vehicular access; with some steep terrain; possibly posing way-finding difficulties - these features taken singly or in combination. Leading in this terrain such as the Lomond Hills will require validation by the local authority. It may be in the form of local validation and experience or through a national qualification.

Hills & Mountainous country will require the leader to be validated by the local authority to lead visits in this terrain. This will normally be through formal national qualification and a logbook of experience. This information must be held on Evolve to support the visit information and to allow approval of the activity.

26.0 Driving in the context of an excursion

- 26.1 Subject to the nature of the excursion, transportation may need to be procured through Procurement Services e.g. coaches and taxis. This is a Council wide approach and there are agreed procedures for this.
- 26.2 Where excursion leaders use a Council mini-bus, All drivers have to undertake training prior to driving a mini-bus. For those who passed their test before Jan 1997, they will have a D1 noted on their licence and would still have to undertake the basic level of training. Staff who drive minibuses should have the appropriate License and assessment from fleet services prior to driving in East Dunbartonshire Council, further information can be obtained through Fleet Services.
- 26.3 If the group of pupils is small, schools may determine that the most appropriate vehicle is a private car. This is generally discouraged, given the availability of other vehicles through the Council, however it is noted that the relative cost of vehicle hire may result in the excursion not taking place. When using private car the owner of said vehicle must be in possession of Insurance covering business use and also a current MOT and Road Tax.

27.0 Insurance

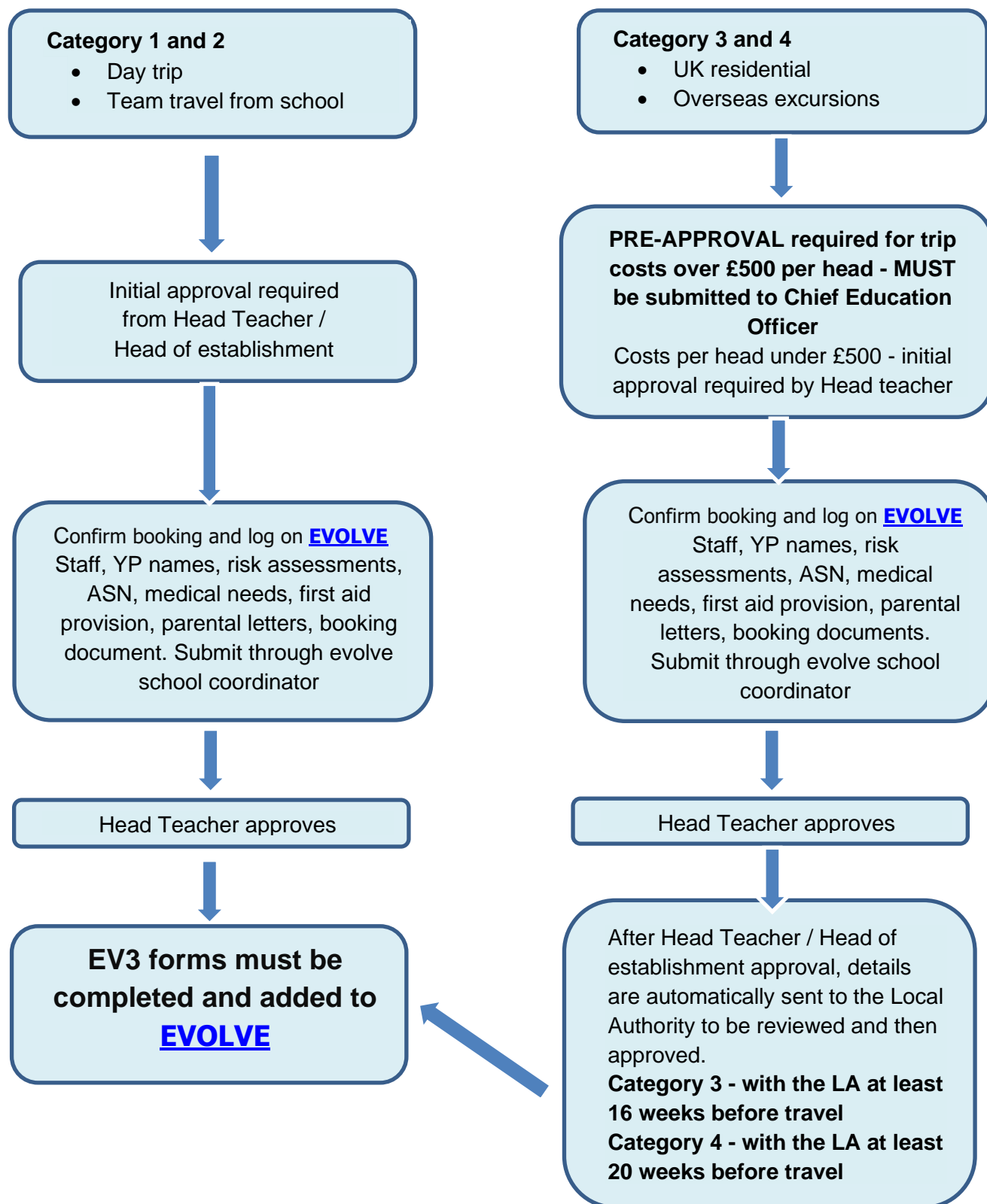
- 27.1 The Councils Liability Insurance will cover activities undertaken within the context of delivering the curriculum and/or in the spirit of excursion leader's employment. This does not extend to personal effects (loss or damage) or personal accident.
- 27.2 The authority's travel insurance policy is available on EVOLVE; a hard copy should be taken on all trips as it has the 24hr emergency contact numbers for the Insurance company.
- 27.3 The Councils Travel Insurance policy is sufficient cover for all our excursions as long as policy has been followed and excursion has been logged on EVOLVE. Travel Policy can be found in EVOLVE.

28.0 Financial Arrangements

There is an expectation that Heads of Establishment ensure that all arrangements in relation to the excursion's finances are in accordance with Council protocols and standards. All excursions should be available for all children and young people in accordance with Equality Act 2010.

Appendix 1: Planning an Excursion Flow Chart

- Research destination - providers, dates, costs
- Consider **RISK MANAGEMENT** around proposed excursion.



Appendix 2: PM 3/17/F01: Residential Trip Request Form (SAMPLE)

School/Centre Name:	East Dunbartonshire High School
Trip Leader	A Smith
Proposed number of staff	5
Intended destination	Paris, Spain, Belgium
Provider	NST Educational trips www.ibt-travel.com (educational trips) No provider we are planning this ourselves
Proposed dates of travel or proposed number of days away	June 2027
Proposed number of young people travelling	42
Educational outcomes of the trip	<ul style="list-style-type: none"> • Opportunity to develop life skills in a new environment • Pupils can experience learning outside the classroom • Outdoor learning to promote skills in teamwork, resilience and communication • Opportunities to sample other cultures through language, visits and food • Opportunities to speak other languages, meet and communicate with people from other countries • Opportunity to develop life skills in an unfamiliar environment
Cost per pupil	Over £500 - please state exact cost if known
Overall cost	42 x cost per pupil
Steps taken by the school/centre to assist in making this trip accessible to all.	<ul style="list-style-type: none"> • We assess every situation individually and support will be offered as necessary to make trip accessible to all who wish to go

	<ul style="list-style-type: none">• Identify SIMD 1-4 pupils who apply and offer a discount through Pupil Equity Fund if successful• Fundraising opportunities for school / pupils to raise money to go towards the trip e.g. Staff Coffee Mornings, Bake Sales, community fund raising• Advertising the trip to pupils early with a payment schedule spread over 15 – 18 months to allow for breakdown of the cost each month• Best value for accommodation e.g. reduced prices by staying in a hostel
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