



# MANAGEMENT CIRCULAR

48

Education Services, City Chambers, 40 John Street, Glasgow G1 1JL

**August 2023**

Management Circular No 48

**To: Heads of All Educational Establishments**

## **School Excursions and Educational Visits**

### **1. Introduction**

Giving more children and young people access to travel, outdoor learning and play opportunities provides invaluable life experiences. This framework, which provides user-friendly processes compliant with health and safety legislation, aims to increase opportunities for all children and young people to access their learning through off-site visits and the outdoors, improving learning outcomes for all.

The outdoor environment offers motivating, exciting, varied, relevant and easily accessible activities from pre-school years through to college and beyond. Through the curriculum and learning for sustainability, an enjoyable, creative, challenging learning journey helps children and young people learn by experience and grow as confident and responsible citizens who value and appreciate their local area and the wider environment of Scotland, which includes spectacular landscapes, rich natural heritage and a diverse built environment including landmarks of international significance.

This management circular provides staff in educational establishments the guidance and support to ensure our children and young people benefit from outdoor experiences. More information can be found in [Going Out There](#), the Scottish framework for safe practice in off-site visits. In addition, you should adhere to the guidance in Management Circular 33 and other relevant policies and procedures. See Appendix 7.

**An index of contents can be found at the end of this document.**

#### **1.1 Incidents and Accidents**

School excursions and educational visits can involve an element of risk. Whilst organisers of activities cannot give guarantees of safety to participants (or their parents/carers) it is essential nevertheless that all possible precautions should be taken to ensure the safety of all involved. The expectations of the authority would be that leaders responsible for children and young people would undertake the same care that would be expected of a prudent parent/carer.

Excursions and educational visits are an important and valuable part of our education system. The objective of this circular is to clarify the procedures to be adopted and to enhance the quality of these visits.

If things do go wrong during a trip, provided sensible and proportionate steps have been taken, it is highly unlikely that there would be any breach of health and safety involved.

## 1.2 Inclusion and Equality

Consideration should, as always, be given 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, gender, religion etc. If it is not possible to include children and young people in the activity, then equivalent learning outcomes must be delivered by other means for that child or young person. These must be fully discussed and agreed by a parent/carer and/or, where appropriate, the young person.

## 1.3 Adopting this Guidance

This guidance has been developed to enable its widest possible adoption, integrating support for Glasgow City Council with planning and provision at local authority level and with management, delivery and practice at establishment level.

The guidance is relevant to everyone who provides planned learning for children and young people.

Adoption of the good practice exemplified in this guidance allows Glasgow City Council to fulfil their responsibilities under the Health and Safety at Work Act 1974 for outdoor experiences and off-site visits for all participants. For all other relevant documents, policies and procedures, see Appendix 7.

## 1.4 Supporting Materials

The framework is supported by tools, resources and accompanying examples of good practice for the planning and evaluation of different levels of outdoor experience and off-site visits, which are straightforward and user-friendly to apply. The range of activities covered is as follows:

- Routine and expected - regular activity as part of normal everyday practice in play and learning (including local off-site visits on foot, by private hire or public transport)
- One-off day visits
- Residential activities
- Wider UK and international trips

## 2 Effective Practice in Managing Outdoor Learning Safely

The ability and competence of staff to plan and manage a dynamic situation in a safe and appropriate way is the key contributor to safe and successful practice in the different levels of outdoor experience and off-site visits.

This is underpinned by:

- Glasgow City Council supporting Heads of Establishment
- Heads of Establishment supporting, identifying and deploying staff with the right competences and experience for leading different levels of off-site visit
- Staff being given training and other opportunities to develop their knowledge, skills and confidence in planning, organising and leading outdoor experiences or off-site visits
- All staff having access to resources of relevant and competent technical advice

It is anticipated that employers should adopt the above set of principles as common and effective practice and should provide support for Heads of Establishment and technical advice. By taking this approach, employers will be using a straightforward and common framework which will reduce bureaucracy and satisfy the duties on them under health and safety legislation.

## **2.1 Glasgow City Council Supporting Heads of Establishments**

Glasgow City Council have a clear duty to provide appropriate information, instruction and training to all their employees. Glasgow City Council will monitor the effectiveness of their management and delivery of outdoor experiences and off-site visits.

Glasgow City Council will also support their employees in the delivery of activities by ensuring that the identification and assessment of the risks involved in participating in any outdoor experience and / or off-site visit have been completed prior to participation. As part of this process, Glasgow City Council will also ensure that proportionate control measures are understood and implemented to deal with the risks identified. This will be further supported by providing generic risk assessments for common outdoor activities and visits.

## **2.2 Helping Heads of Establishment to Support Visit leaders**

Glasgow City Council's arrangements for planning, approval, monitoring, training and audit should support Heads of Establishment in assisting staff to lead outdoor experiences and off-site visits with increasing confidence and competence. Heads of Establishment should have ready access to their employer's policies and guidance and to specialist competent advice on visits, outdoor learning and excursions.

## **2.3 Identifying and Deploying Staff**

The Head of Establishment, who approves each visit, should match the demands of the different levels of the off-site visit to the competencies and experience of individual staff who may be interested in participating.

For adventurous activities, the head of establishment should decide who is competent to lead. Staff should have competence in leading routine off-site visits. The head of establishment will ensure appropriate management arrangements are in place prior to the visit.

## **2.4 Support and Development for Visit leaders**

Glasgow City Council's arrangements for planning, approval, monitoring, training and audit should provide visit leaders with ready access to their employer's policies and guidance. This includes direct access to technical advice on visits and additional field monitoring assistance by a senior member of the establishment in some cases.

Arrangements should enable visit leaders to be clear about their role and to feel supported and confident in it. Where development needs are identified, these should be fulfilled.

A key area for development of professional skills and competence in working outdoors or off-site is the ability of visit leaders to make dynamic risk assessments that take account of changing circumstances and events and cause them to respond appropriately. Training in risk management and approaches to risk education, combined with developmental experience of planning, preparing for, and supervising visits should form part of professional learning opportunities for educators wishing to build capacity in this area. This should include opportunities to consider the many benefits of outdoor learning and the contribution that high quality outdoor learning makes to attainment, achievement and well-being across the curriculum.

## **2.5 Parent Helpers and PVGs**

Whether parents who chaperone on school trips should be required to be PVG Scheme members will depend on the circumstances of the trip, such as, whether the activities occur regularly and the responsibilities of the chaperones. For example, involvement in a one-off day trip does not require a PVG check. A balance has to be struck between avoiding unnecessary checking and protecting children from harm. If you are in any doubt contact [the PVG Scheme](#) website.

## **2.6 Access to Technical Advice**

Glasgow City Council must have access to technical advice on visit and activity safety matters. The adviser needs to have diverse experience of the range of outdoor activity and visit provision. They should be of sufficient authority to ensure that they can develop and take forward strategy, advice and guidance across all sectors and services.

## **2.7 Approval for Visits**

Whilst Glasgow City Council has health and safety responsibilities, it would be normal practice to delegate approval of routine and simple day visits to the head of establishment. Residential trips (not including those which involve adventure activities) should be approved by the head of establishment before notification to the Authority. Adventure activities and overseas trips would normally be treated differently with approval being sought from the head of service taking into account technical advice. See Appendix 1.

## **3 Roles and Responsibilities**

Under the Health and Safety at Work Act 1974, Glasgow City Council is responsible for the health, safety and welfare at work of their employees. Glasgow City Council is 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.

### **3.1 Glasgow City Council Responsibilities**

Glasgow City Council has the following main roles:

- Provide these guidelines and other local authority guidelines to Heads of Establishment and Visit leaders
- Provide access to technical advice where necessary
- Assess proposals for certain categories of visit (especially visits or travel outside the UK and adventure activities)
- 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 off-site visits and activities

### **3.2 Heads of Establishment's Responsibilities**

Heads of Establishment are expected to follow and implement this guidance to ensure their responsibilities are fulfilled and 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.

Heads of Establishment should also ensure that:

- The visit has suitable aims and effective ways of achieving them
- 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 has suitable experience and competencies 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 (See Section 4.2)
- The head of service has approved the visit, if appropriate
- Arrangements have been made for the medical needs and additional support needs of all the participants
- MC97 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, if required
- Suitable contact arrangements are in place
- The emergency arrangements, if required, 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.
- A Critical Incident Plan has been completed.

### **3.3 Visit Leader's responsibilities**

Those in charge of participants have a common law duty to act as any reasonably prudent parent would and to do their best to ensure the health and safety of everyone in the group.

The Visit leader has responsibility for:

- 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. See Appendix 1.
- Following appropriate policies and guidelines
- 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
- Ensuring 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
- Ensuring that all participants, pupils and adults, do not consume any alcohol or other substances. Any substance consumption is strictly forbidden.

### **3.4 Visit Assistant's Responsibilities**

Visit Assistants, including parents and carers supporting visits as well as volunteers working for service providers, have an important role in supporting and enabling outdoor learning experiences and off-site visits. They can help with the running of an activity and be part of the supervision ratio where competent to do so. Often in adventurous activity settings visit leaders / assistants / volunteers need to be included in the operational ratios.

Visit Assistants supervising participants must:

- 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.

### **3.5 Parents' Responsibilities**

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

- Provide the visit leader with emergency contact number(s)
- 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

### **3.6 Participant's Responsibilities**

In agreement with parents, the visit leader and the group, participants will:

- Not take unnecessary risks
- Follow the instructions of the visit leader, visit assistants and other supervisors including those at the venue
- Dress and behave sensibly and responsibly
- Be sensitive to local codes and customs
- Look out for anything that might hurt or threaten themselves or anyone in the group and tell the visit leader, visit assistant or venue supervisor about it
- Comply with the participants' Code of Conduct (where one exists)

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 visit. The aims of the visit for these participants should be fulfilled in other ways wherever possible.

## **4 Planning Visits**

Whatever type of visit is being undertaken - a trip to a local park, museum or swimming pool, or a residential stay in the UK or abroad - time given for preparation will ensure good planning, maximise the potential benefits of the experience and help minimise the risk from any incidents.

The planning and approval of visits should be proportional to the activity. More complex activities will require more planning, involve more people and take more time. Heads of Establishment must satisfy themselves that the person planning the visit is competent and has the necessary relevant experience or access to appropriate technical advice.

### **4.1 Preparing a Visit Plan**

A visit plan needs to be in place for all off-site visits. The visit plan outlines who is to do what, and when. The amount of content and detail in the visit plan will be determined by the nature of the trip.

The visit plan will, as well as keeping everyone safe, help to ensure a successful and meaningful visit by focussing on the benefits of the activities and clearly setting out the aims and objectives.

The visit plan can be thought of as being in three parts:

- Prior to the visit
- During the visit
- Following the visit

The visit plan will form the basis of the information required by the Head of Establishment/Head of Service for granting approval.

#### 4.2 Establishing Ratios

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

- The participants, including visit assistants and visit leader
- Previous experience (of participants and leaders)
- The venue
- The activity
- Getting there
- The time of year
- Medical and behavioural issues

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

- 1 adult to 15 participants for excursions where the element of risk to be encountered is similar to that normally encountered in daily life, e.g. visits to museums or a local walk.
- 1 adult to 10 participants for all residential and overseas visits. It is the responsibility of the school to demonstrate that all adults involved in the supervision of a visit have the necessary skills and experience. There must be a minimum of 2 school staff members e.g. group leader plus 1 school staff, with the group at all times even if the group numbers are less than 20. It is the educational establishment's responsibility to ensure the ratio of school staff to participants is maintained.
- For children under the age of 8, a lower ratio of supervision as appropriate
- For higher risk activities, consideration should be given to a lower ratio of supervision, as appropriate (this should be considered as part of the risk assessment or from existing normal operating procedures).

Other relevant factors to consider:

- Ratios should be based on the excursion/activity and not purely an adult to participant calculation.
- In addition to the Group Leader in charge there must be enough supervisors to cope effectively with an emergency.
- Parent/Guardian volunteers must not be counted in the minimum staff ratio. They should be carefully selected, well known to the establishment and the participants and subject to Disclosure Scotland Check.
- All parent/ guardian volunteers must understand their roles and responsibilities at all times. It may be helpful to put this in writing, i.e. they may be given responsibility for the care and safety of a specific number of children during the trip.
- If an individual risk assessment has to be carried out for a child with Additional Support Needs, which results in assistance required for the journey and activity then there must be at least one member of staff to accompany them on the visit.
- Bus drivers on trips will only be responsible for the vehicle during the excursion and should not be included in the adult to participant ratio.

Any issues or concerns over ratios which arise during the planning of a visit should be discussed with the Health & Safety advisor before the request for approval is submitted.

### **4.3 Communicating with Parents**

The majority of off-site visits are a normal part of education. The aim of this document is to keep the need for procedures to the minimum possible. When children join an establishment or group, parents should be informed about the range of activities that form part of the programme or curriculum. It should be explained that parents will be kept informed about the general plans for expected visits, but that they will not necessarily be informed every time their child goes off-site.

Most establishments will have agreed with participants and parents the need for adequate outdoor clothing and footwear to be provided for all year round off-site activity as a normal part of everyday experience.

For any visit which cannot be classified as routine, parents must have been appropriately informed, in order that they will know where participants will be, and have prepared them for the experience.

### **4.4 Parental Consent and Medical Information**

The majority of off-site visits are a normal part of education and within this guidance are referred to as 'Routine and Expected Visits'. For this category of trip the process of gaining consent and informing parents should be kept as simple as possible and must not be restrictive.

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

- Residential visits
- Adventure activities
- Hazardous environments
- Visits abroad

See Appendix 3 for the consent form that will suffice for these different types of activities. For Routine and Expected visits, and the majority of Day Visits, the medical information which has been obtained at the start of a school session (or other appropriate point) is sufficient. As part of this, parents should have been asked to agree to the participant receiving emergency treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities.

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

### **4.5 Supervision**

The visit leader has overall responsibility for supervision during a trip. All adults who are in a supervisory role have a duty of care for the group at all times. There is no break from this responsibility during the trip.

There are numerous methods of supervising groups but general consideration should be given to the following:

- Establishing meeting points
- Carrying out regular head counts
- Wearing easily identifiable clothing
- Having a buddy system
- Splitting large groups into smaller groups with an identified leader
- Ensuring all participants have ID cards with the visit leaders contact number (preferably on lanyards)



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

There may be times during a visit where the participants come under the care of a third party (e.g. a coach driver or outdoor instructor). In these circumstances, however, it must be realised that the visit leader still retains ultimate responsibility.

#### **4.6 Remote Supervision**

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

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

Visit leaders remain responsible for participants even when not in direct contact with them. They should not underestimate the challenges of remote supervision. It requires extra planning and contingencies to be put in place. This should be reflected in the Visit Plan.

#### **4.7 Exploratory Visit**

**If it is deemed necessary that an exploratory visit is required, the Executive Director must be consulted, before any planning of the visit takes place.**

A visit leader needs to be confident that the location and facilities are suitable for their plans. In most cases this will involve a prior visit. However, in consultation with the Head of Establishment, an experienced visit leader, with good reasons to be confident in their own judgement, may decide to use a location that has not been previously.

#### **4.8 Gender of Accompanying Staff**

With a mixed gender group, it is preferable to have a gender mix of leaders. However, there are some circumstances where this is not possible or essential. Consideration of this issue should be part of the risk assessment process. Parents should be informed of staffing arrangements.

#### **4.9 Using an External Provider**

The term 'external provider' can include museums, local farms, activity providers, residential centres, tour operators, expedition providers etc.

Good communication with any external provider is essential to ensure that the visit matches expectations and runs according to plan.

In the planning stage the visit leader should consider:

- Using a reputable provider
- Liaising with the provider to discuss the aims and the needs of the group
- Establishing whether the provider requires to be vetted
- Checking adequate insurance is in place

Prior to the visit the visit leader should consider:

- Liaising with the provider in order to find out what is expected of them or their party (e.g. where to go, what to bring, etc.)

- Providing any relevant information to the provider such as the group's age-range, relevant medical conditions, additional support needs, competence
- Confirming whether risk assessments are in place
- Compliance with local authority child protection policy

The visit leader retains ultimate responsibility for participants at all times during off-site visits, even when the group is under instruction by staff from the provider.

If using specialised service providers such as tour operators and expedition providers, more detailed information should be sought through the local authority.

## 5 Risk Assessment

It is important to have procedures that encourage participation.

Risk assessments should focus on real risks, rather than on those that are trivial or the result of over-protectiveness. Exposure to real risks should be offset against the benefits of undertaking the visit.

The risk assessment should be adequate and proportionate, nothing more and nothing less. It should only deal with significant and foreseeable risks. It does not require the use of technical formulae and professional health and safety expertise should only be needed in the more complex or specialist cases.

More advice on risk assessments can be found on the Health and Safety area on [Glasgow Online](#).

### 5.1 Preparing Risk Assessments

Glasgow City Council has a legal responsibility to ensure risk assessments are in place for off-site visits and to have a system that ensures these are being implemented. It is appropriate for Glasgow City Council to provide generic risk assessments and these could be incorporated into an online recording tool where these are being used.

Generic risk assessments provide an overview of the foreseeable risks that might be met on a visit with the aim of managing risks so that they are acceptable. In general, 'acceptable' would be free from significant risk of death or permanently disabling injury.

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

- The aims and benefits of the visit
- The participants (including leaders and helpers)
- The venue
- The activity
- Getting there
- Time of year

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

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

## 5.2 Dynamic Risk Assessment

Despite the best planning, the unexpected may happen during a visit and visit leaders have to be prepared to change and adapt as required. Experience and training will enable sound judgements to be made.

The visit leader and visit assistants should monitor the risks throughout the visit and take appropriate action as necessary. This is called dynamic risk assessment and includes knowing when and how to apply contingency plans where they are needed. The actions taken as a result of dynamic risks assessment may be recorded after the visit so that they can inform future planning.

## 6 Transport

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

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

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

### 6.1 Supervision on Transports

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

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

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

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

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

### 6.2 Hiring Coaches and Buses

The Head of Establishment is responsible for ensuring that coaches and buses are only hired from the list as approved by SPT. Professional operators of buses and coaches are legally required to be licensed. Compliance with the various legal requirements is their responsibility not the hirer's.

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

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

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

Where any payment is made towards the costs of participants being carried then a public service vehicle (PSV) license is required by establishments for running or hiring out their own vehicles. Local Traffic Commissioners can provide advice and application forms for PSV operation licences.

The law on driver licensing no longer permits car drivers who pass their test after 1 January 1997 to drive vehicles with more than 8 passenger seats without passing a Passenger Carrying Vehicle (PCV) driving test – unless they are driving under a Section 19 permit, in which case the following conditions must be met:

- The driver must be 21 or over
- The driver must have held a category B (car) licence for at least 2 years
- The driver receives no payment or consideration for driving the vehicle other than out-of-pocket expenses
- The minibus has a Maximum Authorised Mass (MAM) not exceeding 3.5 tonnes (4.25 tonnes including any specialised equipment for the carriage of disabled passengers)

The driver must have the D1 category on their licence for minibuses that have a MAM of over 3.5 tonnes.

### **6.4 Establishment Minibus**

The minibus should be properly maintained in accordance with MC41.

Although the Head of Establishment is ultimately responsible for the establishment's minibus, the driver is responsible for the vehicle when driving it. The minibus driver must be qualified to drive a minibus and have a valid driving licence (see Section 6.3).

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).

### **6.5 Private Cars**

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

- Ensuring that all passengers wear properly adjusted seat belts
- Having appropriate seating in place for children (including booster seating and seatbelt adjustment devices)
- Ensuring that the vehicle is roadworthy and has a valid MOT
- Ensuring that there is appropriate insurance cover for carrying the participants. This will require cover for business purposes. (Heads of Establishment should check this is in place)

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

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

## 7 Insurance

Heads of Establishments and visit leaders should ensure they know the extent of their insurance provision for off-site visits.

The Visit leader must ensure, well before the group departs, that adequate insurance arrangements are in place covering all planned activities. Glasgow City Council is covered by its Public Liability and Employers Liability policy against claims resulting from fault of Glasgow City Council or negligence on the part of one of its employees, full-time or part-time, accordingly all activities officially approved by school, outdoor centre, etc. are covered.

For residential and overseas visits, Appendix 2 should be completed and submitted to [insuranceadmin@glasgow.gov.uk](mailto:insuranceadmin@glasgow.gov.uk) and [MC48educationexcursions@glasgow.gov.uk](mailto:MC48educationexcursions@glasgow.gov.uk) no later than 8 weeks prior to departure.

**NB: At no time should educational establishments seek insurance cover from any company other than Glasgow City Council.**

Details of cover can be found in Management Circular No. 31.

Further information about insurance issues can be sought from the Council's Insurance Officer at [insuranceadmin@glasgow.gov.uk](mailto:insuranceadmin@glasgow.gov.uk).

### 7.1 Information for Parents

Parents should be given details of insurance cover.

For routine and expected visits this can be done on an annual basis through the school handbook. For other categories of visits, details of the level of insurance cover should be included in the visit specific information provided to parents.

Parents need to be advised about any specific additional cover they may want to arrange such as loss of personal belongings.

## 8 Emergency Procedures/Critical Incident Plan

Emergency procedures are an essential part of planning a visit or trip. Educational establishments should ensure that, before embarking on the trip/visit, that they have documented their procedures and the school contact has a copy.

For residential and overseas trips, the visit leader should also complete the Critical Incident Plan and submitted it to the appropriate staff.

This information should include emergency home contact, local hospital (in resort), British embassy/consulate etc. See Appendix 6.

### 8.1 Preparation

Prior to departure on any visit, information should be left with a pre-arranged Establishment-Based Contact and forwarded to QIO International Education at [MC48educationexcursions@glasgow.gov.uk](mailto:MC48educationexcursions@glasgow.gov.uk). This information should include:

- Group names
- Visit location and itinerary
- Expected timings

- Transport arrangements
- Emergency contact details for participants
- Medical information regarding participants
- Critical Incident Plan.

Where appropriate this information should be carried by the visit leader and other visit assistants. If the visit is in the local area within normal session hours there is no need for the visit leader to carry emergency contact details as these will be readily available at the base should they be required.

This information should also be forwarded to the International Office (for residential/overseas trips) at [MC48educationexcursions@glasgow.gov.uk](mailto:MC48educationexcursions@glasgow.gov.uk)

In the event of a flight cancellation on a return journey, the Group Leader should ensure that the contact details for the tour operator and airline are readily available to enable alternative arrangements to be made.

## **8.2 Establishment-Based Contact**

The Establishment-Based Contact has a key role in the Emergency Procedure. It is their role to ensure that:

- They have a copy of the Critical Incident Plan (for residential/overseas trips)
- Information regarding a visit is kept in a secure but accessible location
- If a visit is returning out-with normal hours, or involves an overnight, that visit information is readily accessible
- They know who to contact if an accident or incident is of a serious nature
- They are available 24/7 throughout the duration of the visit

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

It is good practice to ensure that for any residential trip (UK or overseas) that an emergency contact number for an officer from Education Services HQ (QIO or Head of Service) is known to the Establishment-Based Contact.

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

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

- Assess the situation
- Safeguard the uninjured members of the party including the leaders
- Attend to the casualties, if relevant
- Inform the Emergency Services
- Inform the Establishment-Based Contact
- Continue to manage the situation to the best of their ability

In overseas trips, ensure that the UK Embassy/Consulate details are known, recorded and shared with all adults on the trip. This should be included in the Critical Incident Plan. See Appendix 6.

## 8.4 External Contact

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

- **Nobody in the party should speak to the press**
- Media enquiries should be referred to a designated media contact
- Opportunities for external agencies to get access to group members and leaders should be minimised
- Group members should be discouraged from phoning home in the immediate aftermath of an incident - inaccurate or incomplete information might cause unnecessary speculation and anxiety. However, a responsible person should do so on their behalf to provide reassurance if there is potential for a media leak
- Casualty names should not be released externally
- Nobody should discuss legal liability with other parties
- Group members should be discouraged from taking personal photographs of accident sites

## 8.5 Reporting Incidents and Accidents

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/accident 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.

The purpose of the review should be to:

- Establish the facts
- Determine whether there are lessons to be learned
- Provide information to parents
- Exchange information with statutory investigation bodies as required e.g. police, Health & Safety Executive
- Manage media enquiries

## 9 School Visits

### 9.1 Routine and Expected Visits

The Scottish Government have recognised the need for young people to be regularly involved in outdoor activity and learning. This will involve establishments taking young people off-site.

Many of these off-site visits will be routine, and will become an accepted and expected part of the curriculum. Within this guidance, these types of visits have been termed 'Routine and Expected Visits' and establishments should ensure that the process for running them is simple.

Routine and Expected Visits will generally be to local venues, involve easily managed activities, happen on a regular basis and be completed within the normal session times.

#### 9.1.1 Approval

Approval for Routine and Expected Visits is the responsibility of the Head of Establishment.

#### 9.1.2 Visit Plans

There should be a collaborative approach within establishments to develop Visit Plans for the range of venues likely to be used on a regular basis.

Heads of Establishment should work with staff to develop an agreed approach to travelling on foot, to crossing roads or in the use of transport in their locality. Models of effective practice should also be developed and agreed for responding to local conditions and events. Approaches to risk education for children and young people should also be developed.

These plans should be reviewed regularly and adapted if required. They should be considered as working documents that are influenced by any incidents or lessons that have been learned.

### **9.1.3 Risk Assessment**

Heads of Establishment should work with staff to develop risk assessments for the range of venues likely to be used on a regular basis. Routine and Expected visits are by their nature low risk activities and should be quick and easy to risk assess adopting a common sense approach.

Risk assessments should be reviewed on a regular basis.

Routine and Expected Visits might include venues such as museums and swimming pools. Such external providers are required to carry out a risk assessment of their own premises and activities. They must then implement appropriate measures to ensure that their activities are safe. There is no need for visit leaders to request copies of these risk assessments.

### **9.1.4 Information for Parents/ Parental Consent**

When children join an establishment, parents should be informed about the range of activities that are part of the programme or curriculum. Parents should be advised that they will be informed about the general plans for Routine and Expected Visits, but that they will not necessarily be told every time their child goes off-site. Establishments should explain this to parents as part of the induction into the establishment.

Participants and parents should be informed about the need for adequate outdoor clothing and footwear to be available throughout the year to enable Routine and Expected Visits to become a normal part of everyday experience. Consent for Routine and Expected Visits should be gained at induction or on an annual basis. If a visit requires any specific arrangements then parents should be informed.

### **9.1.5 First Aid**

Heads of Establishment should work with staff to agree the level of first aid provision that is required for a Routine an Expected Visit. The following factors should be considered;

- How quickly medical care can be accessed
- Any known medical needs

Where the risk assessment determines the risk is low, it may not be necessary to provide a trained first aider. By contrast, if the risk assessment indicates a raised or high level of risk, it will be necessary for one or more of the accompanying staff to hold a first aid certificate.



### **9.1.6 Swimming pools**

Heads of Establishment will be aware of their local swimming pool facilities for curricular activities. The visit leader should follow the recommended safe supervision level at the pool for children and young people. Levels of supervision should take account of the age and swimming abilities of children and young people, and the nature of the facility being used. Parents/Carers must have completed the necessary swimming consent. See Appendix 3.

## **9.2 One-off Day Visits**

Visits that are a one-off experience or, that are not 'routine and expected' require additional planning considerations.

One-off day visits might include an annual trip to a visitor attraction, attending an event, etc. and are more likely to extend beyond the normal session time.

### **9.2.1 Approval**

Approval for One-off Day Visits is the responsibility of the Head of Establishment.

### **9.2.2 Visit Plans**

The Visit leader is responsible for completing a visit plan for a one-off day visit.

The visit plan should outline who is to do what, and when. The amount of content and detail in the visit plan will be determined by the nature of the trip.

### **9.2.3 Risk Assessment**

It is the responsibility of the visit leader to prepare a specific risk assessment for a one-off day visit.

Visit leaders are responsible for recording significant and foreseeable risks specific to their visit. This should take into account:

- The participants (including leaders and helpers)
- The venue
- The activity
- Getting there
- Time of year

The findings of the risk assessment and the relevant precautions/controls should be agreed with and understood by all participants.

A One-off Day Visit is likely to involve going to visitor attractions such as museums, zoos etc. Such external providers are required to carry out a risk assessment of their own premises and activities. They must then implement appropriate measures to ensure that their activities are safe. There is no need for visit leaders to request copies of these risk assessments.

More information and sample risk assessment can be found in the Health & Safety area on Glasgow Online.

### **9.2.4 Information for Parents/ Parental Consent**

For One-off Day Visits specific information has to be provided to parents and should include:

- The aims and benefits
- The activity and its learning objectives
- The venue
- Travel arrangements
- Insurance cover
- Supervision arrangements

It is recommended that parental consent for the majority of off-site visits is gained at induction or annually. This can include One-off Day Visits.

### **9.2.5 Emergency Details**

Visit leaders should ensure that they carry the following up-to-date information for all participants:

- Relevant medical information
- Emergency contact details
- Any other information relevant to the specific visit

This can be obtained from the annually updated information provided to schools.

For One-off Day Visits which include outdoor activities or venues with specific considerations it may be appropriate to ask parents for up to date information which may have an impact on the visit (e.g. fear of heights, allergies to animals etc.).

### **9.2.6 First Aid and Medical Facilities**

Heads of Establishment and visit leaders need to take the following factors into account when deciding the level of first aid provision that is required on a One-off Day Visit:

- The type of medical facilities that are available
- How quickly medical care can be accessed
- The aims and objectives of the visit
- The age of the participants
- Any known medical needs

Where the risk assessment determines the risk is low, it may not be necessary to provide a trained first aider among the accompanying staff. By contrast, if the risk assessment indicates a raised or high level of risk it will necessary for one or more of the accompanying staff to hold a first aid certificate.

## **9.3 Residential Visits (UK and Overseas)**

A residential experience can be an extremely valuable learning opportunity and should be part of the progressive outdoor learning experiences provided for young people.

Residential visits include any form of overnight stay regardless of the type of accommodation.

All residential visits should be approved by the Head of Establishment before notifying the Head of Service.

For all overseas travel, visit leaders and heads of establishment must contact the ECU Travel Section to ensure that all arrangements comply with GCC guidelines.

[ECU.Travel@glasgow.gov.uk](mailto:ECU.Travel@glasgow.gov.uk)

### **9.3.1 Visit Plans**

The visit leader is responsible for completing a visit plan for a residential visit.

The visit plan should outline who is to do what, and when. The amount of content and detail in the visit plan will be determined by the nature of the trip. The visit plan will, as well as keeping everyone safe, help to ensure a successful and meaningful visit by clearly setting out the aims, objectives and benefits of the activities.

### **9.3.2 Risk Assessment**

It is the responsibility of the visit leader to prepare a specific risk assessment for a residential visit.

A residential establishment is required to have risk assessments in place for their own premises. There is no need for visit leaders to request copies of these risk assessments.

Visit leaders are responsible for recording significant and foreseeable risks specific to their visit. This should take into account:

- The participants (including leaders and helpers)
- The venue
- The accommodation (in terms of how it affects the group)
- The activity
- Getting there
- Time of year

The findings of the risk assessment and the relevant precautions / controls should be agreed and understood by all participants.

### **9.3.3 Supervision**

Residential/Overseas Visits entail additional requirements for supervision. Consideration has to be given to the following:

- Establishing ratios (taking in to account the need to provide 24 hour responsibility)
- Gender of the accompanying staff
- Vetting accompanying adults
- Periods of remote supervision

Supervision during a residential/overseas visit will require a range of supervisory techniques. Heads of Establishment should ensure visit leaders have sufficient knowledge and experience to carry out the very varied role that residential visits demand.

The visit leader and accompanying staff should allow sufficient time in the planning stage to discuss the supervision arrangements. Consideration should be given to a supervision rota, with identified hand-over arrangements, to ensure that it is clear at all times who has supervisory responsibility. This should be co-ordinated by the visit leader.

### **9.3.4 Information for Parents**

For residential visits specific information has to be provided in writing to parents and should include:

- The activities and the learning objectives
- The venue
- Domestic and sleeping arrangements
- Medical provision
- Supervision arrangements
- Travel arrangements
- Insurance cover

- Behaviour code

In addition to written information Heads of Establishment and visit leaders should consider holding a meeting where these points can be discussed. The nature of the visit, the age and experience of the participants and the length of visit will affect this decision.

Communication with parents should include making them aware of procedures for dealing with misbehaviour or behaviour that gives visit leaders cause for concern.

### **9.3.5 Preparing Participants**

It is particularly important for a residential visit to ensure that participants are adequately prepared. Sufficient time should be given to enable participants to be informed and hold discussion about:

- The aims and benefits of the visit
- The nature and demands of the visit
- The domestic and sleeping arrangements
- The supervision arrangements, including which adult is responsible for them
- The standards of behaviour expected at all times and the subsequent sanctions
- What to do in the event of an accident/incident
- The individual's role in ensuring the safety of all participants

If for any reason a participant has to return home early, participants, parents and accompanying staff should agree in advance how this will be carried out and who will meet the cost.

### **9.3.6 Points to consider regarding accommodation**

In the planning stage the visit leader should consider whether the accommodation:

- Fits with the aims and objectives of the visit
- Suits the needs and requirements of all participants
- Is suitable for the gender mix of the group
- Provides adequate security and privacy for all participants
- Complies with appropriate safety standards for the nature of the visit

Prior to the visit the visit leader should if possible / appropriate:

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

On arrival the visit leader should:

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

### **9.3.7 Emergency Details**

On a residential/overseas visit, it is important that the visit leader has adequate knowledge and information about participants to ensure their well-being. Parents should be given the opportunity to pass on relevant information on the consent form and by more informal approaches. eg ParentPay.

The visit leader should ensure that they carry up-to-date information for all participants on the following:

- Relevant medical information
- Emergency contact details
- Any other information relevant to the specific visit including passports/W111 details.

It is essential that this information is shared with accompanying adults, and external providers, where appropriate.

### **9.3.8 First Aid and Medical Facilities**

The aims and objectives of the visit can influence the degree of risk that parents and participants will find acceptable. When considering the location of a residential visit it is an important part of the risk assessment to consider:

- The type of medical facilities that are available
- How quickly medical care can be accessed
- The aims and objectives of the visit
- The age of the participants
- Any known medical needs

Heads of Establishment and visit leaders need to take these factors into account when deciding the level of first aid provision that is required. Where the risk assessment determines the risk is low, it may not be necessary to provide a trained first aider among the accompanying staff. By contrast, if the risk assessment indicates a raised or high level of risk it will necessary for one or more of the accompanying staff to hold a first aid certificate.

Details of local medical centres and hospitals should be recorded in the Critical Incident Plan. See Appendix 6.

## **9.4 Overseas Visits**

Overseas visits include all visits outside the UK. Visiting other countries is one of the best ways of gaining a fuller understanding of one's place in the world, and offers a chance to explore the culture, challenges and opportunities that exist away from these shores.

Each visit overseas will require careful planning, realistic budgeting, and a thorough appreciation of the self-reliance and judgment needed when operating out with the UK. Therefore, it is likely that leaders will have had considerable experience of organising visits within the UK before leading visits overseas, especially to developing countries. Advice should be sought regarding local arrangements.

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

The dangers of disease, civil unrest and terrorism can be checked out early on in the planning process through the Foreign and Commonwealth Office (FCO) Travel Advice website. However, there are constant changes to the levels of risk and the countries and areas they relate to, so this is something that needs to be revisited regularly prior to departure.

The head of establishment must ensure that insurance for all aspects of the trip is Glasgow City Council Insurance. Further information and advice can be obtained from the Insurance Section. See Appendix 2.

#### **9.4.1 Approval**

Consent in principle from the Head of Establishment, Head of Service/International Education QIO, should be obtained prior to making any commitment to young people, parents or third parties. This will require both the Head of Establishment and Glasgow City Council to be satisfied that all necessary planning and preparation are in place before approving the visit.

#### **9.4.2 Visit Plans**

Comprehensive planning and preparation is the most important aspect in ensuring a successful visit. The visit leader is responsible for compiling a visit plan which documents all aspects of the trip – the amount of detail will be determined by the nature of the trip.

The early planning process should consider the following:

##### **Purpose**

The visit plan should outline the aims, objectives and benefits of the visit and provide evidence that the purpose of the visit is compatible with the competences of the leadership team and the age and experience of participants.

##### **Location & Environment**

It is essential that the location and environment to be visited have been researched thoroughly. This can be done through:

- Prior knowledge from previous visits
- Contacting other organisations that have visited the location recently
- Researching guidance provided by the Foreign and Commonwealth Office, and organisations such as the British Council or Embassies.

##### **Financial Viability**

At the planning stage an accurate costing must be established and a realistic decision made regarding the viability of the proposed visit. Where contributions are expected from parents, the information provided must be transparent and realistic, and should include hidden costs such as spending money, visas, inoculations, and additional activities and entrance fees. Contingency monies should be built into the budget for potential emergencies or unseen expenditures.

If fundraising activities are to contribute to financing the trip, the commitment required from participants has to be made clear from the outset. If support is being sought from external sources (grants, sponsorship etc.) this should be secured before proceeding, to avoid unexpected costs once a commitment from parents/participants has been made. Parents must also be made aware of any payment plans and the consequences of withdrawing from the visit once initial payments have been made.

## **Passport and Visa Requirements**

Visit leaders must check the requirements and restrictions on passports, visas and participant's nationalities at an early stage in the planning process.

## **Inclusion**

Where it is reasonably practicable all children should be able to access the opportunity to participate in overseas visits.

A school is less likely to discriminate if it plans a trip taking into account the need to include all pupils irrespective of their protected characteristics rather than if it arranges a trip and then tries to adapt it to make it inclusive.

It is important to consider how accessible any trip is in terms of cost, venue, activities etc. Whilst it is not necessary for every participant to be able to take part in every activity it is necessary to make reasonable adjustments and consider alternatives to make the visit more inclusive.

## **Accommodation**

In the planning stage the visit leader should investigate the availability and suitability of accommodation either through research or by contacting a tour operator. Be aware that standards in some countries are very different to those found in Western Europe and North America.

The visit leader should consider whether the accommodation:

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

## **Health**

In the early planning stages and prior to departure it is important to:

- Check for pre-existing medical conditions of adults and participants
- Research the medical provision available at the location
- Check requirements for vaccinations and preventative medication
- Explore the possible use of a World Health Insurance Card

Further advice is available from the NHS fit for travel website  
<https://www.fitfortravel.nhs.uk/>

## **Personal Safety**

There are countries and areas in the world that are not suitable for school led visits because it could expose participants to unacceptable risks. This can be a fluid and sometimes rapidly changing situation and thorough research has to be done at all stages of the planning process leading up to departure. Heads of Establishment and visit leaders have to be confident, that in visiting a particular area of the world, that the risks do not outweigh the benefits.

Participants should be made aware of their responsibilities in terms of keeping themselves and other group members safe.

### **9.4.3 Risk Assessment**

It is the responsibility of the visit leader to prepare a specific risk assessment for all aspects of an overseas visit for which they are taking direct responsibility. It is very difficult to do this without a pre visit, or comprehensive researching of any relevant information available from: travel agents, tour operators, the Foreign and Commonwealth Office, Embassies, The British Council, or from other leaders who have undertaken similar trips.

Tour operators are responsible for risk assessing the aspects of the trip for which they are responsible. Visit leaders should check that risk assessments are in place.

Visit leaders are responsible for recording significant and foreseeable risks specific to their visit. This process should where possible involve accompanying adults and participants.

This should take into account:

- The participants (including leaders and helpers)
- The venue
- The culture
- The accommodation (in terms of how it affects the group)
- The food and drinking water
- Possible medical emergencies
- The activity
- Transport (to get there and in-country)
- Time of year

The findings of the risk assessment and the relevant precautions/controls should be agreed and understood by all participants including accompanying adults (and parents where appropriate) and be reflected in the visit plan.

There are countries where some pupils might get subjected to increased level of scrutiny, especially on the airports.

### **9.4.4 Information for Parents**

For overseas visits the process of informing parents and participants will need to start well in advance of the visit. In some instances, this may be one or two years prior to departure. Specific information should be provided in writing to parents including:

- The purpose of the visit
- The proposed itinerary and the learning objectives
- The venue
- The costs
- Passport and visa arrangements
- Vaccination requirements
- Domestic and sleeping arrangements
- Health provision
- Supervision arrangements
- Travel arrangements
- Insurance cover
- Behaviour code

In addition to written information Heads of Establishment and visit leaders should hold a meeting/s where these points can be discussed.



Communication with parents should include making them aware of procedures for dealing with misbehaviour, or behaviour that gives visit leaders cause for concern, and the financial consequences of their child having to be returned home from an overseas visit.

#### **9.4.5 Parental Consent**

Parental consent must be obtained for an overseas visit. Detailed information must be provided regarding the visit to enable parents to give informed consent. It is important to remember that parents are giving consent for the itinerary and activities that they have been informed about. Whilst opportunities may arise to do additional activities once on the visit, care needs to be exercised to ensure that parental consent is not being abused.

As part of the initial communication and consent, parents should be made aware of, and agree to, the procedures for dealing with unacceptable behaviour.

#### **9.4.6 Alternative activities/ changes to plans**

Overseas visits can often bring opportunities to take part in unplanned activities or for plans to have to change. It is important that any changes to plans do not vary considerably from what parents have given consent for, and that you do not take part in unplanned activities which would have required parents to have given informed consent.

#### **9.4.7 Transport**

Travel to and from the visit location as well as travel throughout the duration of the visit requires careful planning.

##### **Inter-country**

Overseas Visits can often include travelling across borders be it by air, train, road or ferry. Within Europe this might not be a major concern but in the developing world this can potentially bring about a host of different challenges. The following are examples which may require consideration during the planning stage of any overseas visit:

- Health screening when entering other countries
- Requirement for vaccinations
- Visas and passports
- Access to local currency immediately on arrival
- Different baggage allowances
- Different customs allowances and banned items
- Use of cheap local airlines with potentially inflexible tickets
- The security of possessions, especially in terminals and on public transport

##### **In-country transport**

All potential modes of transport have benefits and drawbacks depending on the country and the purpose of the visit. In some countries the safety of participants can be compromised by poor driving standards, badly maintained roads, and other road users and this issue must be outlined to participants and parents to ensure they are able to give informed consent.

Hired transport – The visit leader must as far as possible be assured that vehicles are well maintained and fit for purpose and that measures will be put in place to address the potential dangers of driver fatigue and over loading.

Public transport - Whilst some countries have high standards of provision others can have unreliable and overcrowded transport. It will be necessary to research the situation

thoroughly before committing to using public transport, with particular focus on whether the group can be adequately supervised in a potentially uncontrolled situation. The impact of a large group of young people on other travellers also needs to be considered.

Self-drive hire vehicles – Plan to use reputable hire companies and find out the legal requirements for driving in each country concerned. Previous experience of driving in the country is highly desirable before driving vehicles containing participants.

#### **9.4.8 Accommodation**

Prior to the visit the visit leader should if possible / appropriate:

- Make a prior visit
- Ask the tour operator for detailed information
- Compile a risk assessment.
- Obtain a floor plan showing the location of the group's rooms. Ideally the rooms should be close together, with the leaders' quarters located nearby or adjacent to enable adequate supervision.
- Allocate rooms to participants.
- Ensure the Code of Conduct covers behavioural expectations when in their rooms.
- Provide information for parents and participants about the type, quality and organisation of the accommodation.

On arrival the Visit leader should:

- Carry out a fire drill as soon as possible to ensure all participants are aware of the layout of the building, its fire precautions / exits, and the fire assembly point.
- Check for any potential hazards (balconies, electrical connections, access to other rooms, external noise etc.) and if necessary establish control measures to deal with these. Where the hazards are extreme or cannot be managed adequately consideration has to be given to insisting on alternative accommodation
- Check that the bedding provided is clean.
- Ensure all participants are aware of the system to ensure they are secure overnight.
- Ensure that the participants are aware how to obtain assistance if required, at any time.

#### **9.4.9 Food and Drinking water**

Food, drink and hygiene overseas can vary considerably from the UK. It is advisable to identify potential hazards in advance and to make arrangements to mitigate any risk. A pre-visit or seeking information from previous visitors will be useful sources of information, as are travel guides and the internet. Information about potential risks should be shared with participants and parents.

#### **9.4.10 Language and local custom**

It is an important part of any excursion abroad to investigate and understand the cultural differences of the country you intend visiting. The aim should be to familiarise the participants in the habits and customs of the country so that they can interact in a socially aware way ensuring that they do not offend local customs. With this in mind a basic knowledge of the language can greatly enhance the experience of the visit for the participant.

Visit leaders should be able to communicate effectively in the native language of the country or through a translator in order to manage the business relating to the Visit or any problems arising.

#### **9.4.11 Weather, climate and clothing**

Research the conditions prevailing at the time of the planned visit. This information should be used to inform participants and parents about any particular clothing/equipment requirements for the planned activities and to raise awareness of any significant risks.

#### **9.4.12 Currency and contingency funds**

It will be important to consider how spending money and contingency funds will be kept safe and accessed throughout the trip. The following questions are examples of what should be considered by the staff team:

- Do we take shared responsibility for carrying spending money to reduce risks of theft?
- Do we have access to a credit card as part of the contingency fund?
- How would we pay for medical care if required?
- When/how do we exchange currency? Most countries will only exchange Bank of England notes.
- Is there a safe in our accommodation?

#### **9.4.13 Communication**

Overseas Visits have to be flexible yet robust. It is necessary to have a plan in place to enable routine and emergency communications with consideration being given to different time zones, mobile coverage, costs etc.

It is important that the visit leader and establishment based contact have agreed the protocol for communication prior to departure. Research has to be done to ensure that any plans are realistic and workable.

It is essential that participants and parents are clear about how and when communication will be possible and/or allowed. Participants should be made aware of the potentially expensive costs of calls and data roaming when abroad.

#### **9.4.14 Emergency Details**

During an overseas visit it is important that the visit leader has adequate knowledge and information about participants to ensure their wellbeing.

Parents should be given the opportunity to pass on any relevant information in the case where there is a need to provide more sensitive information discreetly.

The visit leader must carry up-to-date information for all participants (including accompanying adults) on the following:

- Relevant medical information.
- Emergency contact details.
- Any other information relevant to the specific visit, such as behavioural and psychological knowledge.

#### **9.4.15 First Aid and Medical Facilities**

Access to medical assistance and facilities, and the standard of those facilities, needs to be outlined to participants and parents in the early planning stage. The aims and objectives of the visit can influence the degree of risk that parents and participants will find acceptable.

For example, parents of a young person going on an overseas visit to Europe could reasonably expect access to similar medical care to that available in the UK. By contrast, the parents of a young person taking part in a visit to a developing country would need to accept that access to medical care is limited.

When considering the location of an overseas visit it is an important part of the risk assessment to consider:

- The type of medical facilities available
- How quickly medical care can be accessed
- The aims and objectives of the visit
- The age of the participants
- Any known medical needs
- Is the W111 card accepted

The risk assessment process will assist Heads of Establishment and visit leaders to agree the level of first aid provision that is required.

It should be noted that there are different levels of first aid training and qualification. Visit leaders should consult with their local authority to establish the level of first aid required.

All local (in resort) medical facilities and hospitals should be recorded in the Critical Incident Plan. See Appendix 6.

#### **9.4.16 Natural Water Swimming Activities**

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 e.g. qualified lifeguard cover.

Nonetheless, children and young people should always be in sight of their leaders. One leader should always stay out of the water for better surveillance.

No swimming or activities where swimming is required should take place unless an identified leader holds qualifications, which have been checked, and the appropriate swimming parents/carers consent form has been completed.

## **10 Checklists**

Organising any trip can be an intricate and lengthy process.

To ensure that every step is taken and nothing is excluded, heads of establishment and visit leaders should complete the appropriate checklists.

Appendix 4            Checklist A            Planning and excursion or visit

Appendix 5            Checklist B            Overseas Travel

Douglas Hutchison  
Executive Director of Education





# Application for Insurance Cover

For ALL residential trips in UK and overseas

PLEASE USE BLACK INK AND BLOCK LETTERS

Name of Establishment:
Address:
Phone:

DETAILS OF VISIT

Date of departure:	Date of return:												
<b>Number of Participants</b> <table border="1"><thead><tr><th></th><th>GCC</th><th>NON GCC</th></tr></thead><tbody><tr><td>a) Children/Young people</td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td>b) Adults</td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td>Total</td><td><input type="text"/></td><td><input type="text"/></td></tr></tbody></table> <b>NB: Cover is not automatically provided for non GCC participants. You must check this with the Insurance Section.</b>		GCC	NON GCC	a) Children/Young people	<input type="text"/>	<input type="text"/>	b) Adults	<input type="text"/>	<input type="text"/>	Total	<input type="text"/>	<input type="text"/>	Places to be visited (a full itinerary must be attached): <hr/> Mode(s) of transport:
	GCC	NON GCC											
a) Children/Young people	<input type="text"/>	<input type="text"/>											
b) Adults	<input type="text"/>	<input type="text"/>											
Total	<input type="text"/>	<input type="text"/>											
Are you leaving the UK for this visit?	Yes/No												

PLEASE NOTE THAT COMPLEX MEDICAL ISSUES FOR ANY PARTICIPANT SHOULD BE GIVEN IN THE BODY OF THE EMAIL WHEN SUBMITTING THIS FORM.

PARTICIPANT DETAILS

Name of group leader:
Email of group leader:
Names of <b>all</b> other adult participants (include addresses for Non GCC employees). This must also explain their relationship to the school.

**PARTICIPANTS SHOULD ALSO BE IN POSSESSION OF A GLOBAL HEALTH CARD WHERE APPRIOPRIATE.**

**ACCOMMODATION DETAILS**

Accommodation group is staying in:

Phone:

**EMERGENCY CONTACT IN GLASGOW**

This should be a member of promoted staff in school who has all the details of the visit/trip including list of children/young people and next of kin (including contact details). They should be available on a 24 hour basis for the duration of the visit.

Name:

Address:

Home phone number:

Work phone number:

**TO BE COMPLETED BY HEAD OF ESTABLISHMENT\***

***\* Where the Head of Establishment is accompanying the excursion, they should confirm to their Head of Service that the five paragraphs below have been adhered to. The Head of Service will then sign this form.***

- i. I am satisfied that all aspects including planning, organisation, staffing and adherence to all relevant Glasgow City Council Management Circulars and policies has taken place.
- ii. The emergency contact in Glasgow will have a copy of all group members' details including name, address, phone number of participants next of kin and, details of group itinerary and critical incident information with name, address, phone number of any travel agent who may be involved.
- iii. I am aware of a 24-hour emergency phone number to contact a member of the Directorate should an emergency/serious accident or critical incident arise.
- iv. I hereby apply for insurance cover from Glasgow City Council. I confirm that contact has been made with Insurance Section regarding any pre-existing medical condition.

Signed \_\_\_\_\_ Date \_\_\_\_\_

Signed (Head of Service, if required) \_\_\_\_\_ Date \_\_\_\_\_

**NOTE - THIS FORM MUST BE SUBMITTED NO LATER THAN EIGHT SCHOOL WEEKS PRIOR TO DEPARTURE**

The Head of Establishment must ensure that the leader in charge has contacted the Council's Insurance Section at least **8 school weeks** prior to departure to discuss insurance requirements for any young person who has a pre-existing medical condition/disability/additional support needs in order that appropriate insurance cover can be obtained when travelling overseas. The Insurance Section will require full details of the medical condition/disability. There may be a requirement for a medical certificate from the child/young person's doctor confirming he/she is fit to travel and participate in the international event, dependant on activity.

Completed forms should be submitted to [insuranceadmin@glasgow.gov.uk](mailto:insuranceadmin@glasgow.gov.uk) and copied to [mc48educationexcursions@glasgow.gov.uk](mailto:mc48educationexcursions@glasgow.gov.uk)





# Parent/Carer/Young Person Consent Form

*Day Excursions/Residential/Overseas Visits*

**FOR INDIVIDUAL TRIPS AND EVENTS, THIS INFORMATION SHOULD BE REQUESTED ON PARENTPAY**

**PLEASE USE BLACK INK AND BLOCK LETTERS**

Name of Establishment:			
Visiting:			
Details of travel:			
From Date:	Time:	To Date:	Time:
<b>FOR ANNUAL, LOCAL EXCURSIONS PERMISSION ONLY:</b> I give permission for my child to take part in excursions within the Glasgow City Council area. The school will provide details about each visit before the intended date of trip.			TICK

**MEDICAL INFORMATION**

a) Does your child suffer from any condition requiring medical treatment, including medication?	Yes		No		If YES, please give brief details.
b) Is your child allergic to any medication?	Yes		No		If YES, please specify
c) Has your child received a tetanus injection in the past five (5) years?	Yes		No		
d) Please outline any special dietary requirements of your child.					
e) I undertake to inform the group leader/Head of Establishment as soon as possible of any changes in the medical circumstances between the date on which this form is signed and the commencement of the activity/programme which takes place.					

**SWIMMING ABILITY (WHERE RELEVANT)**

I give permission for my child to participate in swimming activities	Yes		No	
Is your child able to swim 50 metres?				
Is your child confident in the sea or open water?				
Is your child water confident in a pool?				
Is your child safety conscious in water?				

## DECLARATION

**If 16 years of age and over:** I agree (name) \_\_\_\_\_ Date of Birth \_\_\_\_\_

**or if under 16 years of age:** I agree to my child (name) \_\_\_\_\_

taking part in the above-mentioned visit and agree to my/their participation in any or all of the activities described. I acknowledge the need for cooperation and responsible behaviour on my/their part.

I agree to my child receiving medication as instructed and any emergency medical, dental or surgical treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities present. I may be contacted by phoning:

Home: \_\_\_\_\_ Work: \_\_\_\_\_

My home address is: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If not available at above, please contact:

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Relationship to child: \_\_\_\_\_

Name, Address and Phone Number of Family Doctor:

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_ **Parent/Carer**

Signed: \_\_\_\_\_ Date: \_\_\_\_\_ **Young person 12 years or over**

*(Where appropriate)*

**Please note that a young person of 12 years or over can legally consent to any medical treatment. Therefore, a young person 12 years or over should sign with their parent/carer.**



# Checklist A

## Planning an excursion or visit

This checklist outlines the likely stages of planning an excursion. It must be read in conjunction with the main body of this Management Circular, all the appendices and all other relevant policies and procedures. There are three models below. Ensure you use the appropriate checklist.

Proposal for longer excursions and overseas travel will require to be made well in advance. When considering your excursion or visit, please make sure you have sufficient time to discuss and obtain appropriate approval.

<b>Outline Proposal</b>	
For Day Excursions – Send to Head of Establishment	Appendix 1
For Residential and Overseas Visits – Send to Head of Establishments and <a href="mailto:MC48educationexcursions@glasgow.gov.uk">MC48educationexcursions@glasgow.gov.uk</a>	
<b>Planning for Day Excursions</b>	
<input type="checkbox"/> Risk Assessment <input type="checkbox"/> Consent Form <input type="checkbox"/> Administration of Medicines (where appropriate)	Glasgow Online – Health & Safety pages  Appendix 3  MC97
<b>Planning for Residential Trips once approval is granted:</b>	
<input type="checkbox"/> Risk Assessment <input type="checkbox"/> GCC Insurance <input type="checkbox"/> Consent Forms <input type="checkbox"/> Emergency Contacts/Critical Incident <input type="checkbox"/> Administration of Medicines (where appropriate)	Glasgow Online – Health & Safety pages  Appendix 2  Appendix 3  Appendix 6  MC97
<b>Planning for Overseas travel once approval is granted</b>	
<input type="checkbox"/> ECU travel contact <input type="checkbox"/> GCC Insurance <input type="checkbox"/> Consent Forms <input type="checkbox"/> Emergency Contacts/Critical Incident <input type="checkbox"/> Checklist for overseas travel <input type="checkbox"/> Administration of Medicines (where appropriate) <input type="checkbox"/> Risk Assessment	<a href="mailto:ECU.Travel@glasgow.gov.uk">ECU.Travel@glasgow.gov.uk</a>  Appendix 2  Appendix 3  Appendix 6  Appendix 5  MC97  Glasgow Online Health & Safety pages



## Checklist B

### Checklist for overseas travel

#### HEAD OF ESTABLISHMENT

- I have sent Appendix 1 to all relevant parties.
- I have contacted ECU Travel and, travel arrangements comply with local authority guidelines/policies and GCC Insurance is in place. **Only GCC insurance has been used.**
- appropriate adult supervision/group leaders will accompany the party and have relevant PVGs in place.
- all group members are adequately briefed about their responsibilities during the visit and appropriately equipped to deal with emergencies. A plan of action has been agreed should an emergency arise (critical incident).
- a list of group members' names, addresses and emergency contact numbers, contractors' details, programme for visit and risk assessments and critical incident plan are lodged with the school office or other designated places.
- a promoted member of staff in my establishment has a copy of all contact names, detailed itinerary, consent form(s) and critical incident plan and, is available 24 hours a day in case of emergency.
- a risk assessment has been carried out for all aspects of the trip including travel, accommodation, programme, activities etc.
- all activities (including water based) have been sanctioned for participation by parents/carers and appropriate parent/carer/young person consent form(s) have been completed.

#### GROUP LEADERS

- all appropriate documentation regarding GCC Management Circulars and Health & Safety documents have been completed
- all accompanying staff/volunteers understand their roles within the group and their duty of care. Group members understand and agree to a code of conduct during our visit.
- my partner/contact overseas has fully met my requirements to ensure the safety of children and young people in their care
- all group members have completed necessary documentation for travel abroad e.g. valid passport, visa if required, Global Health Card (if appropriate).
- a complete list of group members, with contact names and addresses including emergency contact numbers, risk assessment, detailed itinerary, contractors' details and critical incident plan are lodged with my educational establishment.
- I fully understand the laws/ethics and morals of the country we are visiting and understand the procedures to deal with emergencies in that country.
- I have a 24 hour contact number for a PROMOTED member of staff in Glasgow should an emergency/serious accident/critical incident arise. All group members have a copy of emergency contact details.
- my travel agent/tour operator will provide drivers, couriers and other staff who are able to ensure a proper standard of care for the group and have been relevant PVG (if relevant).
- Parent/Carer/Young Person Consent Form(s) have been completed.



## Critical Incident Information

This form must be completed prior to the commencement of the trip.

Copies must be held by the group leader, the school's 24hr contact and forwarded to [MC48educationexcursions@glasgow.gov.uk](mailto:MC48educationexcursions@glasgow.gov.uk)

Name of Establishment:				Head of Service:					
Name of Group Leader:					Phone:				
Departure Date:			Return Date:						
Place(s) to be visited:									
Adults	Male:		Female:		Group members	Male		Female	
PLEASE NOTE THAT A LIST OF EMERGENCY CONTACTS FOR ENTIRE GROUP SHOULD BE ATTACHED TO THIS FORM.									

**Critical Incident Information: This form must be complete, IN FULL, before submission.**

**a) During normal dates and opening hours**

Head of Establishment \_\_\_\_\_ Phone \_\_\_\_\_

Depute/Other \_\_\_\_\_ Phone \_\_\_\_\_

**b) Out of normal dates and opening hours (inc holiday period)**

Head of Establishment \_\_\_\_\_ Phone \_\_\_\_\_

Depute/Other \_\_\_\_\_ Phone \_\_\_\_\_

**c) Travel Company (if appropriate)**

Name/Address \_\_\_\_\_ Phone \_\_\_\_\_

Booking Reference: \_\_\_\_\_ Flight Nos \_\_\_\_\_

**d) Accommodation Details:**

Address \_\_\_\_\_ Phone \_\_\_\_\_

**e) UK Embassy/Consulate**

Address \_\_\_\_\_ Phone \_\_\_\_\_

**f) Hospital (local to resort)**

Address \_\_\_\_\_ Phone \_\_\_\_\_

**g) Pharmacy/GP(local to resort)**

Address \_\_\_\_\_ Phone \_\_\_\_\_


**h) GCC Insurance**

Policy Number \_\_\_\_\_ Phone \_\_\_\_\_

**i) Directorate Contact**

Name \_\_\_\_\_ Phone \_\_\_\_\_

**Template for group leader emergency contact.**

<b>Name:</b>	
<b>Group Name:</b>	
I am part of the above group.	
In case of emergency	
please contact my leader on:	01234678911

**These should be worn by ALL group members, preferably on lanyards and translated into the appropriate language.**



## Other Relevant Guidance and Procedures

Listed below are the other guidance, policies and procedures that should be consulted and adhered to when planning and embarking on any educational trip or excursion.

This includes internal Glasgow City Council management circulars and guidance as well as Scottish Government guidance.

<b>Going Out There</b>	Scottish Government's Framework for Safe Practice in Off-Site Visits
<b>MC31</b>	Insurance for Participants, Teachers and Other Adults Taking Part in Educational Excursions and Activities
<b>MC33</b>	Safety in Educational Outdoor Activities
<b>MC41</b>	School Owned Minibuses
<b>MC97</b>	Arrangements for the Supervision and Administration of Medication and Support of Healthcare Needs
<b>Glasgow Online</b>	Health & Safety Guidance on Risk Assessments
<b>Glasgow Online</b>	PEPASS PE Code of Practice
<b>NHS Website</b>	<a href="#">Fit for Travel Advice</a>

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