Improving Life through Learning
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- **Appendix 2a**: Excursion Leader’s Checklist, Simple Day Excursion
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Introduction

Providing educational experiences for pupils outside the classroom is an essential part of the school curriculum. Schools, Learning and Education supports establishments in seeking to maximise the opportunities for all pupils to enjoy a variety of educational excursions. There are many types of experiences that can be undertaken – cultural visits, subject learning applied in an outdoor environment, outdoor activities, environmental projects, national awards such as ASDAN, John Muir or Duke of Edinburgh Award, and residential excursions at home and abroad. Establishments are encouraged to examine the breadth and progression of opportunity they provide, as well as seeking to match it to the needs of the individual pupils. Each educational establishment should aspire to a structured programme across its year range to permit this wealth of experience to take place.

Curriculum for Excellence through Outdoor Learning
https://education.gov.scot/improvement/hwb24-support-for-professional-development-in-outdoor-learning

Curriculum for Excellence through outdoor learning provides easily accessible online guidance to support many school-based outdoor learning experiences. The target audience is the practitioner, the teacher/educator who appreciates the vast array of benefits of using the outdoors for the delivery of the curriculum and who is keen to embrace the opportunities our natural environment provides. This online presentation of materials includes health and safety guidance, planning, supervision, preparing those taking part and communicating with parents. In addition, details are included on managing risk and benefit (and the realistic acceptance of the former), decision-making, progression, activity-specific advice, case studies and lessons learned. Throughout this comprehensive online support there are direct links to HASEE (Health and Safety on Educational Excursion) documents.

Approval of Educational Excursions

This document details the procedures that must be adopted in the management and organisation of excursions to both enhance the educational quality and to minimise any associated risks. Many excursions and adventure activities, by their nature, have an element of risk and it is recognised that accidents can, and will, occur. However, good planning and attention to safety measures can reduce the likelihood and lessen the seriousness of those incidents if they do occur.

Approval of excursions requires judgement on skills, experience and competence. It is normally the role of the Head of Establishment within school to decide as to whether an excursion should proceed before submitting to the Schools, Learning and Education Service Manager with responsibility for excursions for final approval.
As part of the approval process it is essential that a risk assessment be completed. All excursion staff should be consulted in the completion of this and it should not be considered a tick box exercise. In addition, those adults taking part in the excursion should be confident in making on the spot, dynamic risk assessments.
Section 1: Roles and Responsibilities

Schools, Learning and Education has a responsibility to provide current guidance on the organisation of educational excursions to be used by all its establishments. This document sets out the principles that establishments must employ when planning and running their excursions.

In order for this Excursion Policy to be effective, it is important that staff involved have an understanding of the responsibilities that operate at each level. The effectiveness of the system relies on there being no weakness in the chain.

1.1 Stirling Council – Schools, Learning and Education

Schools, Learning and Education has a duty of care to its pupils when they are officially on school premises, or when they are under the care of an employee of the Service.

The Chief Education Officer has overall responsibility for safety on establishment excursions. This responsibility consists of the following:

- maintaining an effective policy for running establishment excursions
- delegating a member of Schools, Learning and Education Service staff to monitor the implementation of this policy
- reviewing regularly, at a senior level, the effectiveness of the policy
- receiving immediate notification of any major issues
- ensuring there is a system for handling major incidents on excursions
- have appropriate insurance cover in place
- have in place procedures to monitor and review off-site visits and activities.

Schools, Learning and Education has a Service Manager responsible for ensuring this document is kept up-to-date and in line with national guidance. Heads of Establishments may seek advice through the Service Manager if they need assistance on approving specific excursions or sourcing appropriate advice.

1.2 Head of Establishment

The Head of Establishment is responsible for approving all excursions from their establishment and for ensuring there is a robust process for assessing the risk on each occasion. The Head of Establishment should ensure the following:

- any excursion has appropriate educational aims and effective ways of achieving these
- procedures as identified in this guidance document, work effectively in their establishment and that a practical system is in place so that all people in the establishment operate in a safe manner
• regular monitoring is in place to check that the approval system is working
• appropriate child protection procedures are in place
• an appropriate risk assessment has been completed and proportionate safety measures are in place.
• parents have been appropriately informed
• excursion leaders have suitable experience and competencies for the visit
• the ratio of other accompanying adults to participants is appropriate
• there is adequate and relevant insurance cover in place, if required
• the emergency arrangements are in place and have been communicated to those who need to know.

The Head of Establishment may choose to delegate the power of granting approval for routine excursions to a depute or other experienced member of staff in order to ensure a workable system in the establishment. This individual is referred to as the Excursion Advisor (EA) in this document.

This responsibility should be clearly defined. All more complex visits, including all overseas excursions, must be discussed with and signed off by the Head of Establishment in person.

The Head of Establishment is responsible for approving outdoor activity excursions, and any excursion that may be perceived as having an additional element of adventure or risk. This covers a wide range of activities. Approving these excursions can present complex issues of researching the appropriate qualifications and experience that are required by the deliverer.

The checklist provided in Appendix 1 will assist Head of Establishments (or the delegated EA) in identifying tasks required to carry out these responsibilities. It can be amended to suit individual establishments.

1.3 Excursion Adviser

A Head of Establishment may choose to ask an experienced member of staff to act as the establishment Education Adviser (EA). This should be someone who has knowledge of organising excursions and who has an interest in promoting good practice in this area. The creation of this role within an establishment has several potential benefits:

• it may make it easier, in larger establishments, for staff to obtain advice
• it allows excursion information to be gathered and held by a designated person
• it permits approval of routine excursions in the absence of the Head of Establishment
• it encourages proper checks to be made on excursion procedures
• it promotes the role of outdoor learning within the curriculum.

It should be made clear that the Head of Establishment must retain direct responsibility for approving more complex excursions.
1.4 Excursion Leader

The Excursion Leader (EL) will have overall responsibility for the planning, organisation, supervision and conduct during the excursion and should have regard for the health and safety of the group. It is their responsibility to brief all other staff on the excursion and to advise parents and participants about the purpose of, and conduct during the visit.

When leading a residential or overseas excursion the Excursion Leader should be a suitably experienced member of staff who is able to manage the complexities of organising a residential visit, as well as lead a group of staff and supervise participants for an extended period of time. It is recommended that the Excursion Leader should previously have acted as a member of staff on a similar visit before taking on the role of leader.

Excursion Leaders must be able to show that they have carried out thorough preparation.

The extent of this will depend on the nature of the excursion but, as a minimum, must include:

- submitting approval form/s
- preparing a risk assessment
- informing participants and if applicable, parents of the details
- getting written parental permission for participants aged under 16
- getting participant consent for participants aged 16 and above
- holding relevant information on the medical needs of participants and leaders
- passing relevant information to Base Contact
- completing SEEMIS casual user group for residential and adventure excursions and emailing the Contact Centre on mailto:info@stirling.gov.uk to direct them to this information
- discussing supervision requirements with other excursion staff
- assessing the weather if severe and consulting Head of Establishment/Excursion Advisor on advisability of proceeding.

This applies to all excursions, including those of a regular nature.

A Sample Excursion Leader’s checklist for planning an overseas visit is included in Appendix 2. It should be adapted as necessary. An Emergency Action Guidance card for the Excursion Leader for planning visits are included in Appendices 2a and 2b, these can be adapted as necessary.

Excursion Leaders must keep the Base Contact updated with the details of any changes or incidents that occur on the excursion. They must inform the Base Contact when the excursion has returned to the establishment.
1.5  Base Contact

A responsible member of staff must be nominated as the Base Contact (BC) for every excursion. This person should have sufficient knowledge and authority to be able to handle difficult emergency situations.

The Base Contact may be required to act, under difficult circumstances, to:

- provide advice to the Excursion Leader
- act as a link with parents
- act as a link with Stirling Council’s Chief Education Officer
- ask for assistance in initiating emergency action.

It is important that the Base Contact is available to carry out these tasks throughout the whole period an excursion is away from base. The Base Contact must hold full details about the excursion including a list of participants, emergency contact numbers for all participants, a detailed itinerary and the expected time of return. It is advisable for the Excursion Leader to be able to contact the Base Contact directly via a mobile phone number at any time.

The Base Contact should know what they are going to do in the event of an emergency or non-return of the group. An Emergency Action Guidance card for the Base Contact is included in Appendix 4, and must be kept with the excursion details.

The Base Contact must be informed of any changes or incidents that occur on excursion as soon as is reasonably practical.

The Base Contact must be informed when an excursion has returned to school. The Base Contact’s role does not cease until they have received this notification.

1.6  Stirling Contact Centre

The role of the Contact Centre is to receive and pass on information. In the event of a major incident they will contact the Chief Education Officer and the Incident Response Team. Contact Centre staff will not take any decisions and they will not contact parents/next-of-kin.

The Contact Centre does not need to be informed of simple day excursions. The responsibility for ensuring there is a robust emergency system for these excursions lies entirely within the school.

The Contact Centre must have access to the details of all residential and adventure excursions, including contact details for the Base Contact, before departure. They require an email (Email: info@stirling.gov.uk) from the Excursion Leader, directing them to this information, within SEEMIS.

For DofE expeditions led by non-school staff, the Contact Centre should be emailed all the relevant documents, set out in Section 3.9.
The main emergency contact points for residential, overseas and adventure excursions will be the Base Contact and also Stirling Contact Centre, tel: 01786 470500.

Parents should be informed of the telephone number for the Contact Centre and also that of the Base Contact.

1.7 Parents’ Responsibilities

Parents of children under the age of 16 should be able to make an informed decision on whether their child should participate in any visit and will need to:

- provide the Excursion Leader with emergency contact number(s)
- give consent or inform the establishment if they decide to opt out
- if necessary, give the Excursion 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.

1.8 Stirling Council Support Staff

Below are details of council staff available to support the Excursion Policy. Please do not hesitate in contacting these individuals if clarification is required on any aspect of an excursion.

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Title</th>
<th>Area of Responsibility</th>
<th>Telephone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norman McLeod</td>
<td>Corporate H&amp;S</td>
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<td>01786 237611</td>
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<tr>
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</tr>
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<tr>
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<td><a href="mailto:seemis@stirling.gov.uk">seemis@stirling.gov.uk</a></td>
</tr>
<tr>
<td>Judy Edwards</td>
<td>Service Manager</td>
<td>Policy</td>
<td>01786 233201</td>
<td><a href="mailto:edwardsj@stirling.gov.uk">edwardsj@stirling.gov.uk</a></td>
</tr>
<tr>
<td>Lynne Watson</td>
<td>Contact Centre Manager</td>
<td>Contact Centre</td>
<td>01786 470500 0845 277 7000</td>
<td><a href="mailto:watsoni@stirling.gov.uk">watsoni@stirling.gov.uk</a></td>
</tr>
<tr>
<td>Theresa Marsili</td>
<td>Team Leader</td>
<td>DofE Manager</td>
<td>01786 233208</td>
<td><a href="mailto:marsili@stirling.gov.uk">marsili@stirling.gov.uk</a></td>
</tr>
<tr>
<td>Andrea McFarlane</td>
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<td>Assistant DofE Manager</td>
<td>01786 233580</td>
<td><a href="mailto:mcfarlanea@stirling.gov.uk">mcfarlanea@stirling.gov.uk</a></td>
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Section 2: The Approval System

All excursions must have approval in writing from the Head of Establishment or nominated Excursion Advisor.

Overnight and/or foreign travel and/or adventure excursions must also be approved by Stirling Council and signed off by the Service Manager with responsibility for Excursions.

Risk assessments must be carried out for all excursions and a copy must be retained in establishment.

2.1 Definition of an Educational Excursion

An educational excursion is any activity that is organised by an establishment beyond the limit of the establishment grounds.

2.2 Types of Excursions

Excursions can be categorised into different types:

- simple day excursions
- residential and overseas excursions
- adventure excursions.

Simple day excursions include regular outings to a local area for environmental study, short community visits, visits of a cultural nature such as theatres and museums, recreation activities at centres, sporting events for school teams. These will be of varying length but will usually fall within establishment working hours.

Residential and overseas excursions demand considerable care in planning and execution and this is dealt with in Section 3. Each of these excursion categories may include outdoor activities or an activity that is seen to include ‘adventure’. These categories may be useful in judging how much support is required for any excursion. Factors may include, for example; the number of staff on the excursion, the experience of the staff, the need to keep in contact with school management, the age and needs of the participants.

2.3 Basic Requirements for all Excursions

The following apply to all excursions, including those that might be thought to be routine and simple. There must be:

- a named Excursion Leader
- signed approval for the excursion to take place
- a written risk assessment
- signed parental permission for each pupil under 16 to participate
• a list of participants and their emergency contacts, held by both Excursion Leader and Base Contact
• an emergency procedure system
• a procedure for letting the Base Contact know when the excursion has returned.

The signature of a parent/guardian on a parental consent form is confirmation that the parent/guardian agrees to the excursion, that they are aware of the itinerary and that they have provided up to date emergency contact details and medical information. For this reason a phone call, e-mail or handwritten note from the parent/guardian is not sufficient.

It is essential that information regarding last minute changes, e.g. pupils not participating, is communicated by the Excursion Leader to the Base Contact. The Excursion Leader or the Base Contact must also inform the Contact Centre for all residential and adventurous excursions.

2.4 Approval of Educational Excursions

No excursion may take place without approval. All educational excursions MUST receive signed approval from the Head of Establishment or Excursion Advisor.

There are seven forms contained in the appendices, some only apply to DofE:

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<td>Excursion Risk Assessment</td>
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<td>Form C</td>
<td>Travel Insurance Requisition for Overseas and Residential Excursions</td>
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<td>Form D</td>
<td>DofE Expedition Approval Form</td>
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<td>Form F</td>
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<td>Form G</td>
<td>DofE Expedition Supervisor Profile</td>
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Simple day excursions and adventurous excursions - complete forms A and B. These forms should remain in school.

Residential and overseas excursions – complete forms A, B and C and submit to Service Manager.

DofE Expeditions - complete form B, C, D and F and submit to Service Manager. Form G should be held in school.

The school must retain evidence of the excursions that have been approved for a period of 5 years.
2.5 Preparation Time for Approving Excursions

Excursion leaders should get clearance to plan an excursion from the Head of Establishment.

It is then recommended that as much advance notice as possible is given by the Excursion Leader to the Head of Establishment for agreeing approvals e.g. a minimum of a week for a simple day excursion and a minimum of 6 weeks for a residential excursion or one involving adventure activities.

It may be appropriate to have an establishment calendar of excursions that is compiled with as much advance notice as possible. This will allow for planning in terms of staff provision and cover and also prevent clashes and clustering of excursions. It may also be appropriate to have an annual establishment-based meeting that involves professional discussion regarding appropriateness of excursion, likely outcomes and risk assessment. This will allow for the signing off of a range of activities that could be considered typical excursions. Such meetings should focus on the benefits of learning out of the classroom, thus ensuring that discussions are not driven primarily by the risk agenda.

2.6 Approving a Series of Excursions

The Head of Establishment may decide that it is acceptable for a series of excursions e.g. regular Saturday football matches, to be grouped together as a single programme and grant approval to the whole series at the same time. For regular outings such as short community visits, this may take the form of annual consent, signed off by both parent/guardian and Head of Establishment, and involve the completion of a generic risk assessment. This approach allows excursions of a similar nature to take place with a minimum of bureaucracy. Minor modifications or additions may have to be made over the course of the excursions but it should not be necessary to resubmit new approval forms. It may be sufficient to provide a new note to pupils and parents. A correct list of participants must always be provided to the Base Contact if alterations are made.

There is a risk that regular activities may lead to complacency because they repeatedly happen without incident. It is important that senior management and excursion staff guard against this by regular review of their processes.

2.7 Preparing Participants

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

Consideration should be given to ensuring that participants understand:

- the nature and demands of the visit
- the supervision arrangements, including which adult is responsible for them
- the standards of behaviour expected at all times and not just during activities
- what to do in the event of an accident/incident
- their role in ensuring the safety of all participants.
2.8 Supervision

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

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

- establishing rendezvous points
- carrying out regular head counts
- wearing easily identifiable clothing
- having a buddy system
- splitting large groups into smaller groups with an identified leader.

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

2.9 Supervision on Transport

The Excursion Leader is responsible for the party at all times including maintaining good behaviour 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 into 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.
2.10 Hiring Coaches and Buses

Coaches and buses should be hired from a reputable company. Professional operators of buses and coaches are legally required to be licensed. Compliance with the various legal requirements is their responsibility not the hirer’s. All companies must hold Public Liability Insurance.

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

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

2.11 Licences and Permits for Driving Minibuses

- Stirling Council minibuses can only be used/driven for the business of the council/school.
- There is no insurance cover for use by any other groups (ie, Scouts, Local Rugby Teams, etc) within the community.
- Stirling Council employees, or volunteers, are required to complete Fleet Services driver checks and Midas training in order to drive Council minibuses.

Drivers can drive any size minibus up to and including 17 seats if they hold a D1 on their licence - this may appear as D1, D101, or D1 NFHR etc. Drivers should have a D1 if they took their driving test in 1997 or before. Drivers may also have a D1 if you have undertaken a specialist driving course.

If a driver took a test after 1997 then the driver can still drive a minibus, however the following special rules also apply:

1) The driver must be aged 21 or over.
2) They must have held their license for a minimum of 2 years.
3) The maximum GVW/MAM of the minibus must be 3.5 tonnes. In practice this means a 14 seat minibus. These are available through Stirling Council Fleet Management but they require two weeks’ notice. (Note that you may have access to a ‘superlight minibus’ with 17 seats).
4) The driver must not receive payment for driving.

For more information visit [https://www.gov.uk/driving-a-minibus](https://www.gov.uk/driving-a-minibus).

MiDAS training and assessment can be booked by contacting Kelvin Martin, [martink@stirling.gov.uk](mailto:martink@stirling.gov.uk).
2.12 Private Cars

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

- ensuring that front and back passengers wear properly adjusted seat belts
- having appropriate seating in place for children (including booster seating and seatbelt adjustment devices)
- ensuring that the vehicle is roadworthy and has a valid MOT
- ensuring that there is appropriate insurance cover for carrying the participants. This will require cover for business purposes. (Heads of Establishment 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. The Head of Establishment should ensure that written permission is obtained from the children’s parents to allow their children to travel in private cars.

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.

2.13 Unaccompanied Visits

There may be occasions when young people take part in visits without any accompanying leader for the entire trip. Before such visits are considered, careful thought should be given to why this is deemed to be appropriate.

It may be considered that such a visit is appropriate in the following circumstances:

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

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

The main decision that has to be made is whether an accompanying adult needs to be vetted.

The essential factor in this decision is whether the accompanying adult is doing “regulated work”. This term is explained in Chapter 2 of the Disclosure Scotland Guidance under “Protection of Vulnerable Groups’ (PVG). If an accompanying adult is carrying out regulated work then they must be vetted.

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

In those cases where an application to join the PVG scheme is not required, a basic disclosure could be used instead. Excursion Leaders should know and follow Stirling Council’s child protection arrangement in these matters.

https://www.disclosurescotland.co.uk/disclosureinformation/pvgscheme.htm

2.15 Insurance

The Excursion Leader must ensure, well before the group departs, that adequate insurance arrangements are in place covering all planned activities.

It is important to consult the insurance department to establish the level of insurance cover that is provided by Stirling Council. You need to inform the insurance department if you are planning an overnight or overseas excursion by completing Form C – Travel Insurance Requisition.

Using an External Provider

If an off-site trip involves an external provider (e.g. outdoor activity provider, residential centre), the Excursion Leader should establish the level of insurance provided by their own employer in order to determine whether additional insurance is required.

Service providers such as transport operators are all subject to regulation and inspection and Excursion Leaders can use them in the same way any member of the public would without the need to check insurance.

Using a Travel Company

If your off-site trip involves a travel company, the Excursion Leader should establish the level of insurance provided by their own employer in order to determine whether additional insurance is required.

If the employer provides adequate cover, the Excursion Leader will not need to obtain additional insurance through the travel company.
If additional cover is required the travel company will be able to advice on insurance requirements. However, the following are examples of points to consider when arranging insurance:

Parents should be given details of insurance cover.

For routine and day 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.

2.16 SEEMIS and Recording Excursions

SEEMIS provides an effective electronic tool for recording all excursions. However, as emergency support is provided entirely by the school for simple day excursions, Stirling Contact Centre will not be involved and there is therefore no requirement to use SEEMIS for such visits.

All residential excursions, whether in the UK or abroad, and all adventure activity excursions must be set up as a Casual User Group in SEEMIS. This record must be accurate, clearly dated and include the correct names of all participants. A Casual Group letter giving details of venue, date of visit, itinerary and Base Contact details should be collated and this can be viewed as a Casual Group Form.

A Pupil Emergency Contact Report should then be prepared using:

- Applications/Records/Enquiries/Emergency Contact Report
- Select by Casual Group
- Choose Select All
- Tick Include Contact’s Notes
- Tick Include Pupil’s Notes
- Dialog Print
- Save as PDF file.

A Staff Custom Report should be collated by extracting the required staff and their emergency contact details from SEEMIS. This information should then be put into an excel sheet and emailed to the Contact Centre. If school staff are delivering an adventure activity their corresponding qualifications should be recorded in ‘Notes’ under the Qualifications section in their personal profile on SEEMIS. (Please note, there will be some repetition with Form A as this also asks for staff details. However, it is essential that emergency contact details for all adults are provided. In addition, there must be a record of staff National Governing Body qualifications if they are delivering adventure activities as part of the excursion).

Prior to departure an email should be sent from the school to the Stirling Contact Centre (Email: info@stirling.gov.uk) informing the centre of the excursion within an appropriate timescale i.e. 2 weeks.
The following should be attached to the email:

- Forms A and B
- Pupil Emergency Contact Report
- Staff Emergency Contact Report

An itinerary should be made available either as a Casual Group letter or e-mailed as a word document along with the appropriate forms.

If there are any last minute changes to those taking part in the excursion, changes should be made on SEEMIS. This can be done by highlighting the appropriate name, set Comment and then enter ‘not attending’. This change can be made by either the school administrator or Contact Centre staff. Contact Centre staff will only make such changes if requested to do so by the Head of Establishment, Excursion Advisor or Excursion Leader.

The SEEMIS record will form an essential part of Stirling Council’s emergency procedure system and it is vital that it is accurate. If your school excursion is completed without incident please remove the Casual Group and Casual Group Letter from SEEMIS. If an incident does occur on the excursion, SEEMIS details should be retained until any follow up investigation is complete.

Please note, if school staff require training or clarification on the use of SEEMIS for excursions contact seemis@stirling.gov.uk.

At the time of the excursion please ensure that the emergency contact details held on SEEMIS are correct and appropriate for the duration of the excursion.

DofE volunteers who are not school staff do not have access to SEEMIS and therefore are not required to use SEEMIS to record expeditions. The equivalent information should be emailed to the Contact Centre (Email: info@stirling.gov.uk). This is set out in Section 3.9.
Figure 1: Approving an Excursion

Excursion Leader (EL) gets clearance to plan an excursion

EL investigates bookings, likely numbers, cost, etc.

EL completes relevant parts of Approval Form and Risk Assessment. Submit these to Head of Establishment (HT) or Excursion Adviser (EA)

DAY EXCURSIONS
HT or EA approves simple excursions as quickly as possible on basic information provided

Further checks should not be needed

RESIDENTIAL AND OVERSEAS EXCURSIONS
HT discusses details and signs and then passes to the Service Manager with responsibility for Excursions to sign

Further checks may be required

ADVENTURE ACTIVITIES
HT discusses details and signs and then passes to the Service Manager with responsibility for Excursions to sign

Further checks are likely to be required

APPROVAL GIVEN
Service Manager approves form. Return copy to centre. Copy kept for school records

BOOKING AND CONTRACTS
EL can now proceed with bookings and contracts

INNERMING PARENTS
EL informs parents, holds parents evening, collects money, etc.

EMERGENCY PROCEDURE
EL ensures emergency procedures are in place. SEEMIS record completed for residential and adventure excursions
Section 3: Residential and Overseas Excursions

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

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 considerable experience of organising visits within UK before leading visits overseas, especially to developing countries.

The standard of Health and Safety applying to overseas visits, regardless of location, activity or event, should strive to reflect that of the UK wherever possible. Where it is not possible to guarantee parity of standards, such as fire safety in accommodation, every effort should be made to mitigate or manage the exposure to risk. Parents and 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 level of risk and the countries and areas they relate to, so this is something that needs to be revisited regularly prior to departure.

There is good advice on http://www.ltscotland.org.uk/outdoorlearning in the sections on residential experiences and overseas on factors that should be taken into account.

It is advisable for each school to devise a system for planning a residential excursion so that the Excursion Leader can follow a well-practised pathway.

3.1 Approval

Prior consent in principle from the Head of Establishment, and the Service Manager with responsibility for Excursions should be obtained prior to making any commitment to young people, parents and third parties. This will require both the Head of Establishment and the Service Manager with responsibility for Excursions to be satisfied that all necessary planning and preparation are in place before approving the visit.
3.2 Excursion Plans

Comprehensive planning and preparation is the most important aspect in ensuring a successful excursion. The Excursion Leader is responsible for compiling an excursion 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 Excursion Plan should outline the aims, objectives and benefits of the visit and provide evidence that the visit is compatible with the competences of the team and the age and experience of participants.

Using a Tour Operator

If a tour operator or specialist provider is being used, it is important that they have the appropriate industry accreditation:

- ABTA
- ATOL
- EPA
- STF and BS8848

In addition, it is important to seek references from other groups that have used a provider.

Location and Environment

It is essential that the locations and environments 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.

Accommodation

In the planning stage the Excursion 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 Excursion 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 staff and participants
- research the medical provision available at the location
- check requirements for vaccinations and preventative medication
- explore the possible use of a European Health Insurance Card.

Personal Safety

These are countries and areas in the world that are not suitable for excursions because it could expose participants to unacceptable risks. This can be 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 Excursion Leaders have to be confident that in visiting particular areas of the world, 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.

Financial Viability

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, 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.
3.3 Informing Parents

A parents’ evening should be held before any residential excursion. There are many aspects of a residential excursion that parents need to know.

These include information about:

- travel arrangements
- accommodation
- the programme of activities
- food – meal arrangements during travel, advising staff of any allergies etc
- medical details – informing staff of any concerns
- packing and clothing
- passports
- EHIC – European Health Insurance Cards
- pocket money
- summary of Stirling Council's insurance cover
- emergency procedures.

3.4 Excursions Outwith Europe and North America

Establishments are increasingly organising excursions to distant locations. This can be arranged through the services of a specialist provider or through school staff researching and planning their own excursions. These excursions may additionally include adventurous activities. More vigilant research and discussion may be required during preparation and the Head of Establishment should form a clear view of the evidence that is required in order to grant approval. The Excursion Leader should be expected to provide this evidence in writing as part of the submission. It is advisable to have a comprehensive record of the planning, decision making and delivery of the excursion. In addition, once an excursion has taken place, it is recommended that time is set aside for reviewing the excursion and sharing this knowledge.

3.5 Outdoor Activity and Adventure

Any excursion may include outdoor activities or an additional element of adventure. Some activities clearly fall into the category of adventure e.g. climbing, canoeing, and mountain biking. If an external provider is used, they will probably come under the Adventure Activity Licensing Authority (AALA) and the instructors will either have received appropriate training or will hold National Governing Body qualifications.

Other activities might not be quite so obvious for example: quad biking, paintballing. The Head of Establishment and the Excursion Leader should be wary of making assumptions that the supplier will be ‘professional’ and well organised. It is good practice to have first-hand knowledge of the quality of the product before using it for an excursion.

This is a complex area where detailed knowledge is required before giving approval. It is recommended that Head of Establishment seeks advice through the Service Manager with responsibility for school excursions if they are unsure of any aspect of the approving such excursions.
3.6 Qualifications for Instructing Adventure Activities

Most regulating bodies offer coaching awards for different levels of expertise and to suit different aspects of a sport. Many outdoor activities are regulated by a National Governing Body e.g. canoeing (Scottish Canoe Association/British Canoe Union). It is important that anyone instructing an outdoor activity holds the correct qualification for the type and level of activity they are delivering.

3.7 Prior Knowledge of the Venue

It is strongly recommended that the Excursion Leader should have experience of the activity and the venue before booking an adventure activity. This will ensure that the activity is appropriate for the group and the quality of the product is acceptable.

3.8 Adventure Activity Licensing Authority (AALA)

An AALA licence means that an establishment has been inspected under a UK scheme run by the Health and Safety Executive and has met the required standards for staff training and qualifications, condition and maintenance of equipment, risk assessment and safety procedures. It does not include any comment on domestic arrangements.

The AALA website http://www.hse.gov.uk/aala/index.htm provides general information about activities licensing which will be of use to teachers/educators and others planning adventure activities, including access to the register of licence holders and information about individual activities. It also has information for parents.

The fact that an establishment does not have a licence does not preclude a school from using it.

3.9 Schools and AALA

A school does not need to hold a licence in order to run outdoor activities using its own staff and confining itself to its own pupils. It rests with the school and Schools, Learning and Education Service to make sure the activities are conducted in a safe manner. It is however strongly recommended that these activities meet similar conditions to those expected of the AALA licensing scheme.
3.10 DofE Expeditions

Stirling Council Schools, Learning and Education are licensed by the Duke of Edinburgh’s Award charity to deliver the DofE award.

DofE expeditions organised and run by staff and volunteers operating under the Stirling Council Duke of Edinburgh’s Award Operating License are covered by the Stirling Council AALA license for DofE and the Schools, Learning and Education Excursion Policy.

Within this document references to staff and employees include DofE volunteers. References to establishments include DofE centres. References to pupils include DofE participants. References to school excursions include DofE training events, practice expeditions and qualifying expeditions.

DofE Expedition Supervisors

The role of the DofE Expedition Supervisor is a crucial one, both in ensuring the safety of the participants whilst on an expedition and in maintaining the standards of the DofE. All expeditions, including practice expeditions and training events, must be supervised by a suitably experienced adult who is competent in the chosen mode of travel and who will be based in the area where the expedition takes place. Supervisors accept responsibility for the safety and welfare of the team on behalf of Stirling Council.

Expedition Supervisors will:

- be responsible for the safety and welfare of young people while they are carrying out expeditions
- hold an up-to-date PVG
- be familiar with the 20 conditions of the expedition and the aims of their group
- be suitably experienced and qualified in the mode of travel for the expedition
- keep their DofE Expedition Supervisor Profile up to date, and submit annually to remain approved as a Supervisor
- ensure routes are within their remit (by exception, Expedition Supervisors can operate out with remit for small sections of a route if risk assessed and then be approved by Head of Establishment, with advice from Active Stirling)
- have a valid First Aid certificate (essential for qualified supervisors, strongly recommended for unqualified supervisors)
- have a good understanding of the group’s dynamics, strengths and weaknesses
- ensure the expedition paperwork has been completed including supervision plans, approval forms, risk assessments and emergency contact details
- inform young people and parents of participants under 16 of the expedition details
- ensure participant group are properly equipped and trained
- ideally be present on all expeditions at the same level, so bronze training, practice then qualifying expedition. If this is not possible they should liaise closely with the other supervisors involved
- plan training sessions and schedules to ensure adequate training and to enable participants to become increasingly self-reliant and dependent on their own resources
• co-ordinate and manage other expedition staff in order to ensure good supervisory practice
• ensure all participants have completed and evidenced training and expeditions, and that assessor reports have been completed.

Full details on the role of the Expedition Supervisor can be found in the DofE Awards Expedition Handbook, 13th Edition – Chapter 8.

DofE Expedition Supervisors will be approved by the Head of Establishment, following advice from the Technical Advisor and DofE Manager.

The DofE Centre co-ordinator will hold the records of their leaders. This list will be made available to the DofE Manager and the Head of Establishment.

This list should contain:

• the name of the member of staff/volunteer
• the establishment where they work/ volunteer
• full details of any qualifications they hold
• the National Governing Body issuing the award
• the date when the award was issued
• any revalidation of the award that has been carried out
• details of a current First Aid certificate.

In addition to this info, Expedition Supervisors will complete an Expedition Supervisor Profile and update it annually. A copy will be held centrally and at Centre/School level. The information held within the Expedition Supervisor Profile will be used to determine the routes the supervisor can operate on, and the appropriate make up of supervision teams.

Technical Advice

Active Stirling are the Technical Advisors for DofE within Stirling Council. They provide advice on whether expeditions are suitable, by assessing the route and the supervision team. Responsibility and approval for expeditions remain with the Head of Establishment, not Active Stirling.

To access this support at the planning stages of expeditions please contact excursions@stirling.gov.uk.
<table>
<thead>
<tr>
<th>Mode</th>
<th>Level</th>
<th>Ratio</th>
<th>Qualifications</th>
<th>Technical Advice</th>
<th>Routes</th>
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<tbody>
<tr>
<td>Walking</td>
<td>Bronze</td>
<td>1 approved expedition supervisor for each expedition group of 4-7 participants. If multiple groups are operating in the same area at the same time then expedition supervisors can be approved with sufficient experience but no formal qualifications. They must operate in a team alongside a qualified expedition supervisor, i.e. 2 expedition groups supervised by 1 qualified expedition supervisor and 1 unqualified expedition supervisor. Additional volunteers/staff are often required to support the logistics of expeditions, moving minibuses etc.</td>
<td>LLA/BEL/SML/WGL/HML</td>
<td>Support from Active Stirling (AS) at annual review</td>
<td>Local routes used over several years, refined annually</td>
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<td></td>
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<td></td>
<td></td>
<td>As routes are local, assistance from other expedition supervisors can be readily available</td>
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<tr>
<td>Silver</td>
<td></td>
<td>1 approved expedition supervisor for each expedition group of 4-7 participants. If multiple groups are operating in the same area at the same time then expedition supervisors can be approved with sufficient experience but no formal qualifications</td>
<td>LLA/BEL/SML/WGL/HML</td>
<td>Support from AS at annual review particularly around remaining within BEL remit</td>
<td>Usually set routes used over several years, refined annually</td>
</tr>
<tr>
<td>Mode</td>
<td>Level</td>
<td>Ratio</td>
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<tr>
<td>Walking</td>
<td>Silver</td>
<td>1:7</td>
<td>They must operate in a team alongside a qualified expedition supervisor, i.e. 2 expedition groups supervised by 1 qualified expedition supervisor and at least 1 unqualified expedition supervisor. Additional volunteers/staff are often required to support the logistics of expeditions, moving minibuses etc.</td>
<td>HML/SML</td>
<td>Advice from AS on each submission New routes agreed with groups each year</td>
</tr>
<tr>
<td></td>
<td>Gold</td>
<td>1:4-7</td>
<td>Group of 4-7 young people require 2 adults, one must be qualified, the other can be a volunteer</td>
<td>HML/SML</td>
<td>Advice from AS on each submission New routes agreed with groups each year</td>
</tr>
<tr>
<td>Paddle</td>
<td>Silver and Gold</td>
<td>1:4-8</td>
<td>Group of 4-7 young people require 2 adults, one must be qualified, the other can be a volunteer</td>
<td>BCU coaching awards – check with Active Stirling for advice on relevant qualifications (Coaching and Leading)</td>
<td>Advice from AS on each submission Selection of routes used over several years, with occasional new routes</td>
</tr>
<tr>
<td>Cycle</td>
<td>Silver and Gold</td>
<td>1:7</td>
<td>Group of 4-7 young people require 2 adults, one must be qualified, the other can be a volunteer</td>
<td>Trail cycle &amp; BEL or SML</td>
<td>Advice from AS on each submission Route agreed with groups each year</td>
</tr>
</tbody>
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**Expedition Approval**

Training events must have approval in writing from the Head of Establishment or nominated Excursion Advisor.

DoE expeditions must have approval in writing from the Head of Establishment or nominated Excursion Advisor and must also be approved by the Service Manager with responsibility for excursions.
For DofE centres not attached to a school the DofE Manager must approve expeditions along with the Service Manager with responsibility for Excursions.

The following forms should be submitted for all excursions training events outwith the school grounds, Practice and Qualifying Expeditions:

- DofE Expedition Approval Form
- DofE Route Card
- Route Map
- Risk Assessment
- Green Form (for expeditions in wild country, discuss excursion with DofE Co-ordinator)
- Participant and Leader Summary Sheet or equivalent report from SEEMIS

These should be submitted to the Head of Establishment four weeks in advance, copying in excursions@stirling.gov.uk.

Once the Head of Establishment has approved the expedition and signed the relevant section of Form D – Duke of Edinburgh’s Award Expedition Approval Form, the full submission should be sent to info@stirling.gov.uk, and excursions@stirling.gov.uk.

At this point Form C – Insurance Requisition should be sent to insurance@stirling.gov.uk.

Service Managers with responsibility for excursions will review the submission and give final approval.

**Kit**

All participants and supervisors must be properly equipped for the expeditions. An expedition supervisor should check that individuals and groups have all the necessary items before departure and that a contingency is available if they do not.

Stirling Council have a DofE kit store, and items can be borrowed free of charge. Contact martink@stirling.gov.uk to arrange.

Centres may also have kit stores. Kit must be checked regularly to ensure that it is fit for purpose, and any significant findings recorded on a maintenance sheet. If equipment is not fit for purpose it must be clearly labelled, entered onto maintenance sheet and repaired or destroyed as soon as possible.
Driving Minibuses

All drivers driving minibuses for DofE are required to have completed MiDAS training and drive the correct size of minibus as determined by the entitlements on their driver’s license.

Driver fatigue is a very high contributory factor to road traffic accidents and this should be taken into account as part of the risk assessment process. Consideration must be given to driver hours required and the length of the driver’s day, including time spent on expedition.

Variations

There are 20 conditions for the Expedition Section.

If an individual within your group has needs which means that one or more of the conditions cannot be met, then and application can be made for a variation to these conditions to enable them to participate in their DofE expedition. Contact with the DofE Manager should be made at least 12 weeks before the expedition.

Risk Assessment

Section 4.6 contains further guidance on Risk Assessment.

Young people must be involved in the risk assessment process in order for them to be self-reliant and self-sufficient on expeditions.

All expedition supervisors and assistants should have a copy of the risk assessment, with details of the measures they should take to avoid or reduce risks.

Exploratory visits: all routes should be recce. Where this is not possible due to distance, the Head of Establishment must be made aware at the earliest possible point, and other sources of information sought in order to effectively assess risks.

It is recommended that for all new routes that guidance is sought from the relevant DofE Expedition Area advisor, details are available at http://www.dofe.info/en/content/cms/leaders/expedition-areas/.

Technical advice can be accessed from Active Stirling.

Health/Medical conditions: in the early planning stages and prior to departure, it is important to check for pre-existing medical conditions of the staff and participants. This information should be gathered through the consent form and/or SEEMIS records. Supervisors should also check with participants that they have the full information.

It is advisable to check whether participants have previous injuries which could be aggravated on expedition.

Swimming: swimming and paddling or other entering the waters of river, canal, sea or loch should not be allowed as an impromptu activity. In-water activities should take place only when a proper risk assessment has been completed and proper measures have been put in place to control risks.
River Crossings: where routes require any unbridged water crossings young people must be trained on river crossings, and alternative routes. Expedition Supervisors must be approved to deliver this training either as part of their NGB qualification or completion of training with Active Stirling.

All unbridged water crossings should be detailed on the risk assessment.

Ongoing dynamic risk assessment is the responsibility of everyone involved in expeditions.

Supervision

Levels of supervision change as participants are trained and become more skilled in operating in the outdoors, moving from direct at the training stages through close to remote supervision for the significant parts of the practice and all of the qualifying expedition.

One of the 20 conditions states that “All qualifying expeditions must be unaccompanied and self-sufficient. The team must be unaccompanied, unguided and supervision must be carried out remotely. The Supervisor must be satisfied that participants are capable of undertaking the planned expedition. Contact with adults should be kept to a minimum.”

DofE expedition teams should undertake a rigorous training programme. By the time the qualifying expedition takes place, all of the training and practices should be completed, ensuring all the participants are competent and capable.

As part of effective remote supervision, teams may be more closely supervised for parts of the expedition where specific hazardous areas are unavoidable. This supervision should be kept to an absolute minimum.

It is essential that everyone involved in the expedition (supervisors and participants) understand the supervision arrangements and the expectations upon them.

Base contact and Home-Based Expedition Support

The Base Contact role and responsibilities as set out in this document apply to DofE expeditions. In addition, the Lead Expedition Supervisor and the Base Contact may agree the need for a further role e.g. Home-Based Expedition Support. This is an optional role and will not be required for all expeditions. The responsibilities of this person need to be clearly defined, and the lines of communication agreed.

The role of the Home-Based Expedition Support could be to arrange with parents non-emergency evacuations, communicate information to parents about delayed returns, arrange alternative transport/accommodation as necessary.

The Home-Based Expedition Support person may also be approved to offer support in emergency situations, only if they have sufficient knowledge and experience, and lines of communication are clearly agreed between the Expedition Supervisor, and Base Contact.

The Base Contact retains overall responsibility.
Reviews and Incident Reporting

Expedition reviews are required to be completed by all groups following each expedition, and this information will be monitored and shared as appropriate to enable shared learning and development of good practice across all centres.

As per Section 5 of the Excursion Policy, significant incidents must be reported to Stirling Council Health and Safety. The Expedition Supervisor should inform the Base Contact as soon as possible. The Base Contact will contact the Contact Centre, who will contact Stirling Health and Safety.

The Base Contact or Expedition Supervisor will complete an incident report for Health and Safety on return to base.

Expedition Season Review meetings will be held annually and all centres are required to send a representative from each level to the meeting.

Monitoring

The Technical Advisors for DofE will carry out monitoring and support visits of groups whilst out on practice and qualifying expeditions throughout the season.

The Adventurous Activity Licensing Service will also carry out monitoring visits.
Section 4: Managing Risk

4.1 Requirements of the Excursion Leader

It is the task of the Excursion Leader to manage risk throughout the excursion. This involves:

- preparing a plan for handling the major areas of concern before setting out
- involving the whole group in discussion, where appropriate
- keeping staff and pupils informed
- being observant at all times, and employing other staff for this purpose
- acting decisively if circumstances change
- liaising with Head of Establishment and Base Contact
- having a ‘Plan B’ whenever possible.

4.2 School Emergency Procedures

It is essential that every school give considerable thought to its emergency procedures. It is recommended that every school hold discussion sessions for all those involved in excursions to consider the issues that may arise. This forum can be useful for the sharing of experience and knowledge. It may be desirable to include some scenario-based training.

For an emergency during a simple day excursions the Head of Establishment/Base Contact is the primary point of contact. The procedure should be the same as that for a school-based incident.

For an emergency during a residential, overseas or adventure excursion, Base Contact is the primary point of contact and Stirling Council Contact Centre should also be informed.

4.3 Full Excursion Details

There must be an accurate list of participants for all excursions, including staff. This must include details of how parents/guardians/next-of-kin can be contacted in an emergency. It should include any current medical conditions and treatment being received. It should also contain a detailed itinerary. This list must be in the possession of all excursion staff at all times. It is essential information in the event of an emergency. In the event of the Excursion Leader not being available, it is necessary for all staff to have access to their own copy.

This list must also be held by the Head of Establishment/Base Contact and be accessible to the Contact Centre via SEEMIS or for DofE Expeditions via email for residential, overseas or adventure excursions.
4.4 Action in Emergency

The Excursion Leader should have knowledge of what to do in the event of an emergency.

An Emergency Action Guidance card for excursion staff is included in Appendix 3 and all should be familiar with this prior to excursion departure.

4.5 Emergencies on Overseas Excursions

Excursion Leaders should carry a mobile phone with appropriate SIM card. They should also carry a Stirling Council Insurance Emergency Assistance Card that will provide details on how to contact the Emergency Helpline. This is available from the Insurance Team (tel: 01786 233437), Email: insurance@stirling.gov.uk.

They should make sure that they know:

- the procedure for alerting Emergency Services in the country visited
- how to obtain medical care abroad and what is available
- the method of obtaining assistance from the British Consulate or Embassy
- whether mobile communication will be available on their network.

4.6 Risk Assessment

Under the Health & Safety at Work Act, 1974 and subsequent Management of Health and Safety at Work Regulations, 1999 it is a legal requirement that Excursion Leaders have a written risk assessment in place before departure. This is one of the essential tasks that must be carried out by all Excursion Leaders.

This should take in to account:

- the participants (including leaders and helpers)
- the venue
- the activity
- getting there
- time of year.

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

The risk assessment must be adequate for the task. It must identify the significant risks, ascertain if they can be avoided or minimised, and then identify measures for controlling the situation. It is the responsibility of Head of Establishment to make sure there is a robust system in school for checking and commenting on risk assessments.
The HSE web site www.hse.gov.uk/pubns/indg163.pdf is a useful source of information on risk assessment. It explains the “5 Steps to Risk Assessment”, which are:

- identify the hazards
- decide who is at risk and how they might be harmed
- decide on precautions
- record your findings and implement them
- review your assessment and update it if necessary.

The HSE are very explicit that risk assessment must not be a hindrance to being active. It must not be over complicated as this will defeat its purpose. It must be designed as a practical help to working safely.

Further advice can be found on http://www.scotland.gov.uk/Publications/2004/12/20444/48947.

Advice and training on the completion of risk assessments is available from Stirling Council Compliance Team Leader, tel: 01786 237611.

4.7 Stirling Council Risk Assessment Form

A risk assessment form is supplied in the Appendix (Form B). A sample risk assessment is also included. Form B should be used for recording anticipated risks on educational excursions. It should not be over complicated with excessive detail. While it is acceptable for establishments to have an electronic version of this form, it is good practice for a hard copy, signed by all excursion staff, to be retained.

4.8 Involving Participants in the Risk Assessment

It is recommended that all excursion participants, including pupils, are involved in the completion of the risk assessment. All excursion staff should make sure that the risk assessment is adequate for their use. All participants need to be aware of the part that they have to play. Pupils should be informed, through group briefings and discussion, on how to act in the various situations they may encounter.

4.9 Dynamic Risk Assessment

It is recognised that it is not possible, or advisable, to write down a solution for every risk. Establishment staff make frequent on the spot decisions about safety for groups as an automatic part of their job. This requirement to be alert to changing circumstances and discuss with groups the best course of action also applies when on an excursion. All excursion staff should be aware that there may be an unplanned change that requires a dynamic risk assessment to be made.

Incidents and near misses must be recorded during excursions. This record can then be used to inform both post excursion debriefs and discussion around the completion of further risk assessments.
4.10 First Aid

First aid must form part of the risk assessment. Prior to excursion approval the Head of Establishment/Excursion Advisor and the Excursion Leader should give consideration to the level of first aid that might be needed.

Factors to be included in this are numbers within the group, the nature of the activity, possible injuries and distance to the nearest hospital. There is no requirement for a trained First Aider to be part of the Excursion staff but it is recommended, especially on residential and adventure excursions. Please note, on DoE excursions, there is a requirement for a First Aider to be part of the staff team.

A first aid kit should be taken on all excursions.

Further advice can be found on http://www.scotland.gov.uk/Publications/2004/12/20444/48947.
Section 5: Reporting Accidents

The Excursion Leader is responsible for ensuring that all accidents and incidents are reported in the appropriate manner. The Base Contact should be updated of all incidents that happen on excursions, so they can provide advice and guidance to the Excursion Leader.

As with any major school-based incidents, the incidents mentioned below must be reported to Stirling Council Health and Safety Team. Reporting must be done within 24 hours.

- death
- fracture (except to fingers and toes)
- amputation
- dislocation (of major joint)
- loss of sight (temporary or permanent)
- penetrating injury, or burn, to the eye
- injury from electric shock
- electric shock requiring resuscitation
- any other injury leading to hypothermia, heat-induced illness or unconsciousness
- any injury requiring resuscitation or hospitalisation for more than 24 hours
- acute illness or unconsciousness from asphyxia or absorption/inhalation/ingestion of any substance.

For simple day excursions, normal school policy should be employed.

For residential and adventure activities, a phone call to the Contact Centre should be made. All pertinent information should be communicated. This will be relayed directly to Stirling Council Health and Safety Team.

For overseas excursions, the Excursion Leader/Base Contact must contact the Helpline on the Stirling Council Insurance Emergency Assistance Card as soon as possible if injury or illness results in the need for in-patient hospital treatment. There is a similar requirement in respect of rescue expenses incurred as a result of illness or injury e.g. transport to a medical facility or home.

The Excursion Leader will need to complete an incident report for Health and Safety on return to base.

For other injuries not listed above, an incident from should be completed and submitted to the Head of Establishment as soon as possible.
Section 6: Other Checks and Procedures

6.1 Additional Support Needs

Stirling Council aims to include all children and young people in the full life of the school. As such, the school is expected to have a positive ethos of seeking to include any participant in educational excursions.

In addition, children and young people with a disability have specific rights conferred on them under the Framework of Equalities Act 2010. The Equality Act prohibits establishments from discriminating against, harassing or victimising pupils with in the school who are disabled or have a protected characteristic.

“A person is a disabled person if they have a physical and/or mental impairment which has substantial and long term adverse effect on their ability to carry out normal day to day activities”

The Act requires the educational establishment to make reasonable adjustments in order to facilitate the participation of a child or young person with a disability. It might, for example, be possible to provide a tandem for a visually impaired pupil to take part in a cycling excursion.

In order to ensure a positive outcome for all, full consultation with the young person and their parent or carer should be part of the planning. It may be appropriate to seek advice from other agencies that know the individual well e.g. educational psychologists or physiotherapy. It may also be appropriate to provide additional support for the excursion. Completion of an individual risk assessment form may help with the decision-making in relation to what reasonable adjustments require to be made.

If, after all consideration, it is not possible to make reasonable adjustments then the law does not require the activity to be cancelled or the purpose changed. For example, a group may be planning to ascend Ben Nevis as the culmination of their walking club year. This might not be possible for someone with a disability who has attended other parts of the club sessions. The school may conclude that this activity cannot be modified without disappointing the rest of the group. In this case the activity does not have to be cancelled or changed. However, the club should offer an equivalent alternative activity that the disabled person and other group members can select. Care should be taken to make it as similar as possible to the first activity.

6.2 Financial and Insurance Matters

Advice on safeguarding money paid into the excursion fund is available on HASEE http://www.scotland.gov.uk/Publications/2004/12/20444/48947. It is necessary to check the claims of all companies about their current registration with protection schemes such as ABTA.

Excursion participants are protected by Stirling Council insurance with cover including loss of money and baggage, medical and emergency travel expenses and personal accidents. A summary of cover is included in Appendix 5. These limits must be clearly pointed out during the preparation stage of the excursion to participants and parents. Full details of the Policy can be provided if required. There should be no requirement to purchase additional insurance. Any concerns regarding level of cover should be discussed directly with the Insurance Team.
6.3 Employing a Commercial Supplier

Insurance details should be requested from anyone who is delivering a major aspect of an excursion including accommodation providers, tour operators and any supplier of outdoor or adventurous activity.

School excursions frequently use commercial suppliers to deliver the whole or part of an excursion. This often involves making a contract that will commit the school to a financial outlay. For this reason, it is imperative that the Excursion Leader knows definitely that the excursion will get, or has received approval, before signing any contract.

The Excursion Leader may be in the position of making a contract with a commercial supplier on behalf of the parents and the sums of money may be considerable especially if an overseas excursion. Implications of any contract should be discussed in detail with the Head of Establishment especially for an overseas excursion. Any money paid to commercial suppliers should be safeguarded from default as far as is practicable. In the case of overseas excursions, this would involve confirming current ABTA registration.

Commercial suppliers are responsible for assessing the risks of those parts of the visit appearing in the contract. The Excursion Leader should obtain assurance from the commercial supplier that risks have been assessed and that their staff are competent to instruct and lead pupils of the group's range and activity. It is good practice to seek details of their safety management systems. Commercial suppliers should also provide details of any independent inspection-based external verification. Where the Excursion Leader does not feel competent to assess the validity of a commercial supplier's safety systems or assurance advice should be sought from the Schools, Learning and Education Service Manager with responsibility for excursions who may also seek advice from a technical adviser.

Stirling Council's insurance will provide protection for participants. However, if the accident or loss were caused by the supplier's negligence, the Council insurer would seek to recover the cost of the claim from the supplier. It is therefore essential that the supplier holds Public Liability Insurance to an adequate level. Excursion Leaders must therefore ask for evidence from any commercial supplier that they hold current Public Liability Insurance for £5,000,000. This figure is generally accepted as the industry norm. Any lower insurance figure should be treated with caution and the Head of Establishment should take advice from Stirling Council Insurance Team before proceeding.

6.4 Pupil Use of Mobile Phones

It is recommended that there is consideration, at the planning stage, around the use of mobile phones. This should address casual use as well as use in the case of an incident or emergency.

The Head of Establishment has the discretion to make the decision whether or not to allow pupils to bring mobile phones on an excursion. If mobile phones are allowed, it may be appropriate to enforce similar conditions as to those used during the school day i.e. no use during formal delivery sessions. In addition, a restricted period of use in the evenings followed by no use at night may be appropriate. This may be most readily enforced by staff retaining phones along with other valuables. Information should be provided at the Parents’ evening and during preparation meetings with pupils prior to departure.
6.5 Indirect Supervision

Indirect supervision is defined as any period when pupils are not under the immediate and direct control of a member of staff. It is sometimes known as ‘Remote supervision’. There are many reasons for employing this form of supervision as an educational tool as it can encourage independence, develop responsibility and promote group co-operation. It is recognised that there are various control measures required if using indirect supervision.

Pupils should:

- be given responsibility in a gradual manner
- receive training for working on their own
- understand any risks and be able to handle them
- have a plan in case things go wrong
- be able to get help if needed.

It is the responsibility of the Excursion Leader to make sure that periods of indirect supervision are properly managed by staff at all times and that pupils are only given appropriate tasks. There should be a full explanation of the procedures included in the Risk Assessment. Parents should be informed that pupils will be working under indirect supervision.

If indirect supervision is used on outdoor activities such as on Duke of Edinburgh walking expeditions staff must be experienced in running the activity, be very familiar with the area where they will be working, and have a reliable method for limiting the difficulties faced by pupils.

6.6 Ratios

There are several factors that determine an appropriate staff to pupil ratio for educational excursions. These may be the requirements of the pupils:

- age of the pupils
- any medical needs
- any learning needs
- any behavioural needs

or they may be the requirements of the excursion:

- the excursion duration
- it is in school hours/it is residential
- it is close to base/it is abroad
- the supervision will be simple/complex
- it includes easy outdoor activities/complex outdoor activities
- they have run this excursion many times/never before
- they are experienced staff/new staff
- they will have many tasks/few tasks to carry out.

The above factors are capable of many permutations and it is therefore not possible to give an absolute answer to ‘correct ratio’. Early year establishments should comply with ratios set by the Care Inspectorate guidelines.
6.7 Staff Gender on Residential Excursions

Residential excursions of mixed gender should, when possible, have a mix of gender present. When not possible e.g. small establishments with all female staff, parents must be fully informed and in agreement.

6.8 Swimming

Although most swimming will take place in well regulated pools with qualified staff in charge, Excursion Leaders should ensure that they, and their fellow staff actively monitor the session at all times. They should ensure that their pupils always co-operate with the pool staff.

School staff taking charge of swimming sessions (unless it is a regular curricular activity) should follow a similar approval process to outdoor activities. Swimming and paddling in natural waters can present real risks and requires careful judgement and vigilance.

6.9 Weather

Weather can be a major factor affecting any educational excursion. It is therefore necessary for all Excursion Leaders to assess its impact on their plans. Extreme heat can be as much an issue as extreme cold, wet or snow. Excursion Leaders must assess if it will be necessary to take special precautions. This can only be done shortly before the excursion.

6.10 Clothing

Participants should be advised if additional clothing will be required or if sun cream must be taken. Staff should check that this has been carried out.

6.11 Driving Conditions

Adverse weather can have a major influence on driving conditions. Excursion Leaders must assess any likely impact of the weather. If the group have not left school before the arrival of bad weather, the Excursion Leader should consult the Head of Establishment on whether to proceed. Remember, the responsibility for safety ultimately rests with the Head of Establishment.

If the group are already on excursion, the Leader should carefully consider the best course of action. Under some circumstances this may be to delay the return. Although there will pressure on the Excursion Leader to get the group back to base, it may be preferable to take the more cautious option. The Excursion Leader should consult the Head of Establishment or Base Contact for assistance if delay is necessary.
6.12 Use of Volunteer Drivers to Transport Children on Behalf of the Establishment

Volunteer drivers (parents, carers or other non-staff volunteers) can be used to transport pupils for out of school purposes, e.g. trips, sports competitions, visits etc.

Any such individual who will be traveling alone with children must have had an enhanced Disclosure Scotland check carried out.

More information is available in an appendix in the Parental Engagement Strategy.
Glossary of Terms

DofE Centre
A location where the DofE is run (for example a school, youth club/centre, workplace).

DofE Centre Co-ordinator
The person who sets up and manages the DofE in a centre. They support leaders and oversee the groups.

DofE Expedition Area Advisor
A DofE volunteer based in a geographical area, able to assist with enquiries about routes and campsites. More information available at http://dofe.info/en/content/cms/leaders/expedition-areas/.

DofE Expedition Supervisor
The person responsible for supervising and supporting a team of participants to ensure their safety and well-being whilst they are undertaking their expedition. Where there is a mix of qualified and unqualified supervisors supporting multiple groups, a qualified supervisor will be agreed as the Lead Expedition Supervisor and will co-ordinate the team supervising the expedition.

DofE Manager
The named person in a licensed organisation who is responsible for the day-to-day delivery of the DofE across Stirling.

Expedition Assistants
Individuals supporting expedition supervisors. They may support with logistics, pastoral support and may also be gaining experience with a view to becoming an expedition supervisor in future.

Technical Advisor
This role is required under the terms of the Adventurous Activities Licence. The technical advisor provides advice on safety matters covered by the licence. Stirling Council holds an AALA license for DofE activities. The technical advisors are based in the Active Stirling team.

Review of Excursions Policy

<table>
<thead>
<tr>
<th></th>
<th>Date</th>
<th>Lead Officers(s)</th>
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<tbody>
<tr>
<td>Produced</td>
<td>April 2014</td>
<td>Bill Miller SM</td>
</tr>
<tr>
<td>Updated</td>
<td>June 2017</td>
<td>Judy Edwards</td>
</tr>
<tr>
<td>Review</td>
<td>June 2020</td>
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# Head of Establishment's Checklist

<table>
<thead>
<tr>
<th>ITEM</th>
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<tbody>
<tr>
<td><strong>Approval</strong></td>
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<tr>
<td>Excursion forms are available in known location in school</td>
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<tr>
<td>Staff have been informed on use of excursion forms</td>
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<tr>
<td>Procedure in place for Head of Establishments to sign approval forms</td>
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<tr>
<td>Head of Establishments monitors effectiveness of risk assessments</td>
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<tr>
<td>School keeps a copy of forms that have been approved</td>
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<tr>
<td>Advice to be sought for approving adventure/overseas excursions</td>
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<tr>
<td><strong>Emergency procedures</strong></td>
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<tr>
<td>Base-Contact system established in school</td>
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<td>Procedure for communication between Base-Contact and Excursion Leader checked regularly</td>
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<tr>
<td>Base Contact available throughout the excursion</td>
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<tr>
<td>Staff to be aware of Stirling Education’s excursion emergency system</td>
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<tr>
<td>All residential and adventure excursions are recorded on SEEMIS and sent to the contact centre</td>
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<td><strong>Training</strong></td>
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<td>Regular discussion takes place in school about excursion procedures</td>
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<td>Training takes place for new staff on excursion procedures.</td>
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<td>Discussion takes place on circumstances that may cause an excursion to be cancelled</td>
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<tr>
<td>Specific training needs are identified as they arise, and are put in place (e.g. for running overseas excursions)</td>
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<tr>
<td>First aid training needs are identified and put in place</td>
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<tr>
<td>Outdoor activity training needs are identified and put in place</td>
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<tr>
<td><strong>The role of different staff involved in excursions</strong></td>
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<tr>
<td>A school process exists for ensuring Excursion Leader and other excursion staff have suitable experience for level of visit</td>
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<tr>
<td>Excursion Adviser has been appointed from school staff (if felt advantageous to smooth running of excursions)</td>
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<tr>
<td>Office staff have clearly defined tasks in supporting the excursion system</td>
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<tr>
<td><strong>Safety</strong></td>
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<tr>
<td>Written Risk Assessments are properly prepared and checked</td>
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<tr>
<td>First aid and medical care identified for all excursions</td>
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<tr>
<td>Staff ratios are examined and meet the needs of the excursion</td>
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<tr>
<td>Staff are encouraged to have a “Plan B” for all excursions.</td>
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<tr>
<td>Staff advised of their responsibility for pastoral care at all times</td>
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<td>A review is held after any significant occurrence</td>
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<tr>
<td><strong>Transport</strong></td>
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<tr>
<td>All transport used on excursion meets high standards</td>
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<tr>
<td>Seat belts used on all road journeys</td>
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<tr>
<td>Staff to be advised of their responsibility to abandon unsafe journeys</td>
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<tr>
<td>Staff to be advised of the need to consult Head of Establishment if in doubt about advisability of proceeding</td>
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## Excursion Leader’s Checklist – Simple Day Excursion

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<thead>
<tr>
<th>ITEM</th>
<th>DATE</th>
<th>COMMENTS</th>
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<tbody>
<tr>
<td>Submit outline plan to management</td>
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<td>Receive permission to proceed</td>
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<td>Draw up provisional list of support staff</td>
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<td>Obtain provisional booking</td>
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<td>Check suitability of travel arrangements</td>
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<td>Complete approval and risk assessment forms</td>
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<tr>
<td>Receive approval from Head of Establishment</td>
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<tr>
<td>Inform parents/pupils in writing of details/cost etc</td>
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<td>Get reply in writing, with deposit, from parents</td>
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<td>Set up money collecting system in school</td>
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<td>Keep parents informed of excursion details</td>
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<tr>
<td>Collect pocket money or establish procedures</td>
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<tr>
<td>Draw up list of participants</td>
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<tr>
<td>Summarise pupil medical details for all staff</td>
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<tr>
<td>Discuss supervision arrangements with staff</td>
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<tr>
<td>Establish “code of conduct” for pupils</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete itinerary details for Base Contact</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete participant list</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inform parents of emergency contact system</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Draw up list of items to be available on journey</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have first aid kit available</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Excursion Leader’s Checklist – Residential and Adventure Activities

<table>
<thead>
<tr>
<th>ITEM</th>
<th>DATE</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit outline plan to management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receive permission to proceed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Draw up provisional list of support staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Obtain provisional booking from tour company</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check company for ABTA registration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check company for Public Liability Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check suitability of accommodation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check suitability of travel arrangements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete approval and risk assessment forms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receive Approval from Head of Establishment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inform parents/pupils in writing of details/cost etc</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inform parents of insurance details</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Send documentation to Service Manager for approval at <a href="mailto:excursions@stirling.gov.uk">excursions@stirling.gov.uk</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Get reply in writing, with deposit, from parents</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Set up money collecting system in school</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Issue receipts to pupils</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Draw up list of participants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confirm excursion with tour company</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ensure payment deadlines are met to company</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keep parents informed of excursion details</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Book date for parents’ evening</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Obtain passport photos and forms from pupils</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Obtain group passport</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Obtain EHIC cards from pupils</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collect pocket money or establish procedures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summarise pupil medical details for all staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Risk assess all pupils and staff medical conditions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discuss supervision arrangements with fellow staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Establish “code of conduct” for pupils</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete itinerary details for Base Contact</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete participant list and SEEMIS record</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inform parents of emergency contact system</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Send documentation to Contact Centre at <a href="mailto:info@stirling.gov.uk">info@stirling.gov.uk</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Draw up list of items to be available on journey</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have first aid kit available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have a participant list available at all times</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have rooming list available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit insurance requisition to <a href="mailto:insurance@stirling.gov.uk">insurance@stirling.gov.uk</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have emergency funds available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Issue final joining instructions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carry evidence of insurance</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Advice and Action Card for Excursion Leader

<table>
<thead>
<tr>
<th>EXCURSION STAFF GUIDANCE CARD</th>
<th>Serious Accident or Emergency</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ADVICE</strong></td>
<td></td>
</tr>
<tr>
<td>This card should be carried at all times during an excursion</td>
<td></td>
</tr>
</tbody>
</table>

**A serious accident or emergency is:**
- An accident leading to a fatality
- An accident involving serious of multiple fractures
- An accident leading to amputation or other serious injury
- Any serious or life-threatening illness
- Any situation where parents cannot be contacted and significant decisions require to be made (e.g. invasive surgery)
- Any situation where the press or media might be involved

**Warnings**
- DO NOT speak to the press or media
- DO NOT allow any of the party to speak to the press or media
- DO NOT let party members phone home until contact has been made with Base Contact and you know that calls or visits to parents of children involved has been made
- DO NOT make any statements admitting liability

**Advice**
- DO show compassion to anyone involved
- DO keep a written record of all relevant facts
- DO preserve any vital evidence
- DO accept there are limits to your own endurance

<table>
<thead>
<tr>
<th>EXCURSION STAFF GUIDANCE CARD</th>
<th>Serious Accident or Emergency</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ACTION</strong></td>
<td></td>
</tr>
<tr>
<td>This card should be carried at all times during an excursion</td>
<td></td>
</tr>
</tbody>
</table>

**First priority – care of the group**
- Ensure safety of casualties and group from further danger
- Call for appropriate emergency help (police, fire ambulance, coastguard, mountain rescue)
- Carry out First Aid to the extent of your training
- Deal with group welfare. Delegate other staff to assist
- Do not interfere with any evidence that could form part of subsequent investigation

**Next step – passing on information**
- Inform Base Contact, OR if unavailable
- Contact Stirling Contact Centre on 01786 470500
- Make sure you have all the necessary numbers at all times
- Use the Emergency Assistance card if abroad, telephone +44(0)20 8762 8326

**Have the following information ready (in writing if possible):**
- Your name and name and address of school
- Your contact phone number for receiving return calls
- Location of incident and nature of incident
- Names of group members involved and extent of injuries
- Description of action taken so far
- Nature of further assistance required

The contact centre will contact the most appropriate member from the Incident Response Team who will then be responsible for managing the incident.
## Advice and Action Card for Base Contact

### BASE CONTACT GUIDANCE CARD

#### Serious Accident or Emergency

**ADVICE**

This card should be available at all times during an excursion

A serious accident or emergency is:

- An accident leading to a fatality
- An accident involving serious or multiple fractures
- An accident leading to amputation or other serious injury
- Any serious or life-threatening illness
- Circumstances where a party member is at serious risk
- Any situation where parents cannot be contacted and significant decisions require to be made
- (e.g. invasive surgery)
- Any situation where the press or media might be involved

**Warnings**

- **DO NOT** speak to the press or media under any circumstances unless this has been cleared by a senior member of education management
- **DO NOT** allow any of the party to speak to the press or media
- **DO NOT** authorise party members to phone home until you know that calls or visits to parents of children involved have been made
- **DO NOT** make any statements admitting liability

**Advice**

- **DO show compassion to anyone involved**
- **DO keep a written record of all relevant facts**
- **DO preserve any vital evidence**

---

### BASE CONTACT GUIDANCE CARD

#### Serious Accident or Emergency

**ACTION**

This card should be available at all times during an excursion

**Initial action**

If you receive a call informing you of a serious accident or incident make a note of:

- Name and contact number of caller (including codes)
- Time of the call
- Nature and location of the incident
- Time of the incident
- Name of any individuals involved
- Condition and location of any injured
- Details of any assistance required
- Whether the police have been informed

**Subsequent action**

Ensure the following have been done:

- Inform the Head of Establishment immediately
- Inform Stirling Contact Centre on 01786 470500 who will inform IRT if necessary
- In working hours, contact School, Learning and Education Senior Management Team on 01786 233560 or 233633. Advice will be given regarding contacting parents.

The appropriate member from the IRT (Incident Response Team) will then be responsible for managing the incident. The Chief Education Officer is part of this.

Remain available to provide further information and assistance.
**Group Personal Accident & Travel Policy**

**SUMMARY OF COVER FOR THE YEAR COMMENCING 01 APRIL 2017**

**INSURER: AIG**

**POLICY NUMBER: 0010605057**

The main benefits of the Personal Accident and Travel policy are listed briefly below. This is followed by an AIG Policy Summary, which describes the significant features of cover. For further details of cover, terms, exemptions and conditions, contact the Council's Insurance Team by phone at 01786 233437 or by email at insurance@stirling.gov.uk.

**INSURED PERSONS**

Organisers, participants, members, employees and others travelling on excursions or trips organised by or under the auspices of Stirling Council.

**PERSONAL ACCIDENT COVER**

Insurance Risk(s) and Benefits

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Death</td>
<td>£20,000</td>
</tr>
<tr>
<td>2</td>
<td>Loss of one eye or one limb</td>
<td>£20,000</td>
</tr>
<tr>
<td>3a</td>
<td>Loss of both eyes or two or more limbs, or loss of one eye and one limb</td>
<td>£20,000</td>
</tr>
<tr>
<td>3b</td>
<td>Loss of speech</td>
<td>£20,000</td>
</tr>
<tr>
<td>3c(i)</td>
<td>Loss of hearing in both ears</td>
<td>£20,000</td>
</tr>
<tr>
<td>3c(ii)</td>
<td>Loss of hearing in one ear</td>
<td>£25% of 3c(i)</td>
</tr>
<tr>
<td>4a</td>
<td>Permanent Total Disablement</td>
<td>£20,000</td>
</tr>
<tr>
<td>4b</td>
<td>Permanent Partial Disablement</td>
<td>Based on 'Continental Scale'</td>
</tr>
</tbody>
</table>

Medical expenses incurred in connection with a valid claim under items detailed above will not exceed 15% of the compensation payable under these items.

Additional benefits payable in respect of a Permanent Total Disability claim:

- Quadriplegia   £100,000
- Paraplegia     £25,000
TRAVEL COVER

1  Medical and emergency travel expenses  £ Unlimited
2  Rescue Expenses  £ Unlimited
3  Assistance  £ Unlimited
4  Legal Expenses  £50,000
5  Personal liability  £5,000,000
6  Personal property  £5,000 (single item limit £2,000)
7  Money  £5,000 (cash limit £2,000)
8  Cancellation, curtailment, travel disruption, replacement and travel delay  £10,000
9  Hi-jack  £25,000
10  Kidnap, Kidnapping for Ransom or Hostage (aggregate limit)  £250,000
11  Political Evacuation (aggregate limit)  £50,000

Territorial Limits

The cover is worldwide but check with Council’s Insurance Team if considering visiting a high risk area.

Excess

There is no policy excess.

MONEY COLLECTED PRIOR TO EXCURSION

Money collected for the outing is covered by the Council’s Money policy and it is worth noting that:

- the limit of money that can be held in a safe in premises owned or occupied by Stirling Council is £1,000 unless the safe has a higher limit rating which has been agreed with the council’s insurers.
- the limit for money held in a locked receptacle (other than a safe or strong room) in Stirling Council premises is £500.
- where money is entrusted to a Stirling Council employee and taken home by that employee the limit of cover is £300.

The Insurance Team will assist with any other issues in relation to cover or claims relating to excursions.
STIRLING COUNCIL EDUCATION ESTABLISHMENT
EXCURSION APPLICATION FORM

ABOUT YOUR EXCURSION

Dates: From ___ To ___

Location of Excursion: ____________________________

<table>
<thead>
<tr>
<th>Starting point / time</th>
<th>ETA at Location</th>
<th>Depart Location</th>
<th>Arrive Home Base</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

Overnight? Yes: ☐ No: ☐
If yes, please see over.

Description of Excursion: including educational objectives

EL Contact Number during Excursion: ____________________________

ABOUT YOUR GROUP

Establishment Name: ____________________________

Number of participants: ** Male: __________ Female: ______ Age range of participants: ______

**For mixed groups, it is good practice to have male and female leaders.

(The Leader and Participant Summary Sheet must be attached to this form and submitted prior to event)

<table>
<thead>
<tr>
<th>Leaders</th>
<th>Position</th>
<th>First Aid</th>
<th>Enhanced PVG/Disclosure Vetted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leader in charge of group:</td>
<td>Yes: ☐ No: ☐</td>
<td>Yes: ☐ No: ☐</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yes: ☐ No: ☐</td>
<td>Yes: ☐ No: ☐</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yes: ☐ No: ☐</td>
<td>Yes: ☐ No: ☐</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yes: ☐ No: ☐</td>
<td>Yes: ☐ No: ☐</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Yes: ☐ No: ☐</td>
<td>Yes: ☐ No: ☐</td>
<td></td>
</tr>
</tbody>
</table>
EMERGENCY PROCEDURES

Base contact in the event of a serious accident / incident (This person must be a Council Employee)

Name:  
Landline Number/Mobile Number:  

<table>
<thead>
<tr>
<th>9.00am to 5.00pm:</th>
<th>5.00pm to 9.00am:</th>
</tr>
</thead>
</table>

Named Council Emergency Contact: 01786 470500

TRANSPORT ARRANGEMENTS

Participants arranging own transport  
Public transport  
Include details in itinerary

Leaders using own cars to transport young people  
Business insurance in place and cars roadworthy  
Confirm with Base Contact Vehicle Registration

Minibus transporting young people  
Drivers PVG’d and valid MiDAS  
Confirm with Base Contact Vehicle Registration

Private coach transporting young people  
Company Name:_______________

OVERNIGHT ARRANGEMENTS

Approximate programme for trips with overnights must be attached.

APPROVAL

Application Submitted by  
For Official Approval of Activity

<table>
<thead>
<tr>
<th>Name</th>
<th>Organisation</th>
<th>Approved</th>
<th>Not Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Mobile Number  
Email Address  
Signature  
Date  

Name  
(Service Manager on behalf of the Head of Schools, Learning and Education)

Signature  
Date  

Signature  
Date
Head of Establishment Approval

Name ________________________________
Signature ________________________________
Date ___________________________________

Submit the completed excursion form at least four weeks prior to the excursion if overnight or adventure excursion: excursions@stirling.gov.uk

Do not proceed with Excursion until you have received confirmation that your application has been approved at the Centre. If you have not received notification one week prior to excursion, contact your line manager.
• the limit for money held in a locked receptacle (other than a safe or strong room) in Stirling Council premises is £500.
• where money is entrusted to a Stirling Council employee and taken home by that employee the limit of cover is £300.

The Insurance Team will assist with any other issues in relation to cover or claims relating to excursions.
### Excursion Approval Form – Risk Assessment

**Excursion to**

**Date(s)**

**Excursion Leader**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Risk</th>
<th>Control measure</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

Risk Assessment compiled by  
(Excursion Leader, Name & Signature)  Date

Risk Assessment approved by  
(Head of Establishment/Excursion Advisor)  Date
EDUCATION TRAVEL INSURANCE REQUISITION

TO BE COMPLETED FOR ALL OVERNIGHT AND OVERSEAS EXCURSIONS

Excursion Leader: ............................................... Establishment/School: ........................................

Excursion Destination:

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

Dates of Travel: From ........../........./.......... To ........../........./..........

Numbers Travelling:

Employees: ........ Elected Members: ........ Others: ........ Children: ........

Purpose of Trip:

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

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

Request for Insurance Cover Authorised by Head Teacher/Line Manager:

........................................................................................................................................................................ (Signature)

Name: .......................................................... Position: ..........................................................

Date: ........../........./.........

Send to insurance@stirling.gov.uk and copy in excursions@stirling.gov.uk when trip is booked
## ABOUT YOUR ACTIVITY

<table>
<thead>
<tr>
<th>Expedition Training</th>
<th>Mode of Travel:</th>
<th>Foot</th>
<th></th>
<th>DofE Level:</th>
<th>Bronze</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cycle</td>
<td></td>
<td></td>
<td>Silver</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Canoe</td>
<td></td>
<td></td>
<td>Gold</td>
<td></td>
</tr>
</tbody>
</table>

Dates: From __________ To __________

Location of Activity: __________________________

Overnight Arrangements: Campsite? Wild camping?

## ABOUT YOUR GROUP

DofE Centre and Group Name: __________________________

Number of participants: Male: __________ Female: __________ Age range of participants: __________

### Supervisors/Assistants

<table>
<thead>
<tr>
<th>Qualifications include First Aid</th>
<th>Contact Number throughout the expedition</th>
<th>PVG</th>
<th>Leader Profile up to date?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Supervisor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes:</td>
<td></td>
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<td>No:</td>
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<td></td>
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<td>Yes:</td>
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<td>No:</td>
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<td>Yes:</td>
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<td>Yes:</td>
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<td>No:</td>
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<td></td>
<td></td>
<td>Yes:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>No:</td>
<td></td>
</tr>
</tbody>
</table>

All supervisors and assistants must be listed. Add more rows if needed.

## EMERGENCY PROCEDURES

**Base Contact** available 24 hours a day throughout duration of activity

Name: __________________________ Telephone Number: __________________________

9.00am to 5.00pm: __________________________ 5.00pm to 9.00am: __________________________

**Optional Home-Based Expedition Support** available 24 hours a day throughout duration of activity

Name: __________________________ Telephone Number: __________________________

9.00am to 5.00pm: __________________________ 5.00pm to 9.00am: __________________________

Responsibilities of Home-Based Expedition Support: __________________________
**QUALIFYING EXPEDITION**

Name/s of Accredited Assessor

Assessor Registration Number

Assessors must be registered on Stirling Council Assessor list or booked through the DofE Assessor network.
At Gold, Assessor must be independent of DofE Centre.

Aim/s of Expedition/s:

<table>
<thead>
<tr>
<th>ROUTE SUMMARY &amp; HAZARDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has route been recce’d?</td>
</tr>
<tr>
<td>Date of recce: or Planned recce:</td>
</tr>
<tr>
<td>Has the route been used previously?</td>
</tr>
<tr>
<td>If a new route, has advice from the Area Advisor been sought?</td>
</tr>
<tr>
<td>Is the route in its entirety within the remit of the supervisors’ qualifications?</td>
</tr>
<tr>
<td>Mobile phone coverage for area checked and factored into supervision plan</td>
</tr>
<tr>
<td>Participants will complete their own route cards</td>
</tr>
</tbody>
</table>

Route Summary - Eg. Tracks, road, open country, forest

<table>
<thead>
<tr>
<th>RISK ASSESSMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical conditions of participants and leaders risk assessed</td>
</tr>
<tr>
<td>Route specific hazards risk assessed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPERVISION AND ASSESSMENT PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eg. Direct/Close/Remote</td>
</tr>
<tr>
<td>How will supervisors, assistants and assessors communicate?</td>
</tr>
<tr>
<td>Is there additional support available in the area (farmers/residents)</td>
</tr>
<tr>
<td>Modes of transport for Supervisors – foot, bike?</td>
</tr>
<tr>
<td>Late group/late leader plan</td>
</tr>
<tr>
<td>Use of GPS Spots, radios, .</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FINANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has the Exped been costed and budgeted?</td>
</tr>
<tr>
<td>Cost to participants</td>
</tr>
<tr>
<td>Eg. £35</td>
</tr>
<tr>
<td>£20 plus share of transport costs and youth hostel</td>
</tr>
</tbody>
</table>
Do any of the participants require support with meeting the costs?  
Yes ☐  No ☐

**KIT**

Kit list agreed with participants and leaders  
Yes ☐  No ☐

Kit request submitted to central and group stores  
Yes ☐  No ☐

Date agreed for kit check: ______________

**TRANSPORT PLANS**

Participants arranging own transport  
☐

Public transport  
☐  Include details in itinerary

Leaders using own cars to transport young people  
☐ Confirm with Base Contact the

Business insurance in place and cars roadworthy  
☐ Vehicle Registration

Minibus transporting young people  
☐ Confirm with Base Contact the

Drivers PVG’d and valid MiDAS  
☐ Vehicle Registration

Private coach transporting young people  
☐ Company Name:_______________

**LANDOWNER ACCESS / PERMISSION**

Has access / permission been granted?  
Yes ☐  No ☐

<table>
<thead>
<tr>
<th>Name of Landowner / Authority</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephone number</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Permission for vehicle access?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**GREEN FORM**

Is Expedition in Wild Country?  
Yes ☐  No ☐

**20 CONDITIONS**

Does the expedition meet the aims and principles as set out in the Handbook?  
Yes ☐  No ☐

Do any of the participants require a variation to the 20 conditions?  
Yes ☐  No ☐

If yes, please detail below or attach variation form

All variations to the 20 conditions need to be agreed by DofE Manager and Assessor prior to heading out.
COMMUNICATION WITH PARENTS AND PARTICIPANTS

Detail communication to date and any further planned communication before expedition

SUPPORTING DOCUMENTS INCLUDED

Risk Assessment (Form B)       ☐
Participant and Leader Summary Sheet (Form F)       ☐
Route Card       ☐
Route Map       ☐
Copy of Green Form if expedition is in Wild Country       ☐  Submit to Scotland.Assessors@DofE.org
Insurance requisition for all residential excursions       ☐

APPROVAL

Submit this form and supporting documents to the Head of Establishment at least six weeks prior to the expedition, copying in excursions@stirling.gov.uk

You will receive a tag line which should be included in the subject heading of all further correspondence.

Application submitted by:

Name _________________________________________________________
DofE Centre/School _________________________________________________________
Contact Number _________________________________________________________
Email Address _________________________________________________________
Signature _________________________________________________________
Date _________________________________________________________
Approval - Head of Establishment:

Name _________________________________________________________

Signature _________________________________________________________

Date _________________________________________________________

When approved by the Head of Establishment forward signed paperwork and any updates to excursions@stirling.gov.uk Use tag line and add HEAD TEACHER APPROVAL to subject line.

For overnight excursions send completed Insurance Requisition to insurance@stirling.gov.uk

Approval - Service Manager, Schools Learning and Education:

Name _________________________________________________________

Signature _________________________________________________________

Date _________________________________________________________

Do not proceed with Excursion until you have received confirmation that your application has been approved at the Centre. If you have not received notification one week prior to excursion, contact excursions@stirling.gov.uk
STIRLING COUNCIL
DUKE OF EDINBURGH’S AWARD
EXPEDITION CONSENT FORM

To be completed by ALL participants and leaders, with additional parent/guardian consent for young people under the age of 16.

Return to: ___________________________________ by____________________

<table>
<thead>
<tr>
<th>1. Group/School</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Expedition/Activity</td>
<td></td>
</tr>
<tr>
<td>3. Date(s)</td>
<td></td>
</tr>
<tr>
<td>4. Full name</td>
<td></td>
</tr>
<tr>
<td>5. Address including postcode</td>
<td></td>
</tr>
<tr>
<td>6. Mobile number</td>
<td></td>
</tr>
<tr>
<td>7. E-mail address (Parent/Guardian email address if under 16)</td>
<td></td>
</tr>
<tr>
<td>8. Date of Birth</td>
<td></td>
</tr>
</tbody>
</table>

In the event of an emergency, it is important that the Expedition Supervisor has the necessary information about any medical condition that could affect the participation or treatment of all those involved. All information will be treated in strict confidence, and will not necessarily prejudice inclusion in the activity. Full and accurate information must be given.

<table>
<thead>
<tr>
<th>9. Have you had recent surgery or been in contact with any infectious or contagious disease? Details:</th>
<th>☐ YES ☐ NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>10. Have you any known allergies? Details of allergies and treatment plans:</td>
<td>☐ YES ☐ NO</td>
</tr>
<tr>
<td>11. Are you currently undergoing treatment by a doctor? Details including medication:</td>
<td>☐ YES ☐ NO</td>
</tr>
</tbody>
</table>
12. Have you any medical condition which a doctor/first aider should know about before carrying out treatment? Details:  

☐ YES  ☐ No

13. Is there any additional info the Expedition Supervisor should have? (Travel sickness, bed wetting, dietary requirements, sleepwalking, first time away from home, phobias, previous injuries….)  

☐ YES  ☐ No

14. If taking medication – is it self-administered? Details including dosage and frequency  

☐ YES  ☐ No

Please advise the Expedition Supervisor if anything changes prior to the commencement of the activity.

15. Name and Address and Telephone Number of Doctor

16. Emergency contacts

<table>
<thead>
<tr>
<th>Emergency Contact 1</th>
<th>Emergency Contact 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>Name:</td>
</tr>
<tr>
<td>Relationship to Participant:</td>
<td>Relationship to Participant:</td>
</tr>
<tr>
<td>Address:</td>
<td>Address:</td>
</tr>
<tr>
<td>Telephone number during expedition:</td>
<td>Telephone number during expedition:</td>
</tr>
<tr>
<td>Alternative number:</td>
<td>Alternative number:</td>
</tr>
</tbody>
</table>

17. Swimming Ability – for water-based activities only  
I certify that ____________ cannot swim / can swim 50 metres / is confident in cold water wearing a buoyancy aid. (Delete as appropriate.)

18. Participant Consent (to be counter signed by parent/guardian if participant is aged under 16)  

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>I consent to taking part in the expedition.</td>
<td></td>
</tr>
</tbody>
</table>

| | |
| | |
| I acknowledge receipt of information relating to the expedition. | |

| | |
| | |
| I understand that it is not always possible to have both male and female leaders on expedition, and when it is not possible I consent to taking part. | |
I have the required clothing/equipment, including First Aid items such as paracetamol, ibuprofen, antiseptic cream, antihistamine cream and tablets. I will inform the Expedition Supervisor if there are any issues with this.

To the best of my knowledge, I am medically fit to participate in the activities involved. I will notify the Expedition Supervisor in the event of any relevant changes to my health and/or fitness which may take place prior to the expedition.

I consent to receiving emergency medical/surgical/dental treatment as considered necessary by the medical authorities. (Please delete as appropriate)

I have received information on the Council’s insurance cover.

The emergency contacts will be contactable throughout the duration of the expedition and one will be available to assist with transporting me home if I become unwell/are unable to continue the expedition.

I agree to act sensibly and responsibly. I will ensure I do not take any unnecessary risks. I will conform to any instruction on matters of safety and good order given before and during the expedition. I will draw to the attention of the Expedition Supervisors any distress, concern or discomfort arising during or resulting from the expedition. I understand that if I jeopardise my own safety or the safety of others through inappropriate behaviour, I may be removed from the expedition. Any additional costs incurred as a result of my actions may be recovered from my parents/guardians.

I consent to being photographed.

I consent to my image being used in Stirling Council/School/DofE group publicity. (Please delete as appropriate).

**Participant Signature:**

<table>
<thead>
<tr>
<th>Print Name</th>
<th>Signed</th>
<th>Date</th>
</tr>
</thead>
</table>

**Parent / Guardian to countersign if young person aged under 16:**

<table>
<thead>
<tr>
<th>Print Name</th>
<th>Signed</th>
<th>Date</th>
</tr>
</thead>
</table>

**DATA PROTECTION STATEMENT**

Stirling Council as the data controller of your personal details is subject to the terms of the Data Protection Act 1988, we are required to provide you, the data subject, with details of the data controller and purposes for which we will be/are processing your data.

We will use your data for the purpose of administering the activity/excursion noted above

We will use your data to ensure that your personal details are correct and up-to-date

We may need to contact you in the case of an emergency or to update you with progress of the activity/excursion

We may contact you with details of other Stirling Council initiatives that may be of interest.

We will not share your data outwith Stirling Council Schools, Learning and Education unless in a genuine emergency.

If you have any questions please contact your leader in the first place and then the DofE Manager on 01786 233580.
Form F

STIRLING COUNCIL
DUKE OF EDINBURGH’S AWARD
LEADER & PARTICIPANT SUMMARY SHEET

Expedition Date: 

Expedition Location: 

SUPERVISORS/ ASSISTANTS/ ASSESSORS

<table>
<thead>
<tr>
<th>Name</th>
<th>Designation</th>
<th>Emergency Contact Name</th>
<th>Emergency Contact No</th>
<th>Qualifications (First Aid, BELA, ML, Midas)</th>
<th>Health Issues/Specialist needs</th>
</tr>
</thead>
<tbody>
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PARTICIPANTS DETAILS

<table>
<thead>
<tr>
<th>Group</th>
<th>Participants Name</th>
<th>Gender</th>
<th>Age</th>
<th>Emergency Contact Name</th>
<th>Emergency Contact Number</th>
<th>Health Issues/Specialist Needs/Risk Factors</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>


Form G

**DofE Expedition Supervisor Profile**

Name:

DofE Centre:

Supporting:  
- Bronze
- Silver
- Gold

PVG Number:  
Assessor Number:

Date:  
Revalidation date:

Contact number:

Email address:

**DofE Expedition experience**

**Relevant qualifications and training with date completed or expiry date (if applicable)**

**Relevant experience (Mark on scale)**

<table>
<thead>
<tr>
<th></th>
<th>None</th>
<th>A little</th>
<th>Some</th>
<th>Competent</th>
<th>Extensive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Map reading</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Using a compass</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wild camping</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Night walking</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
Experience working with young people

Personal walking experience description/log and experience of other modes of transport
### Stirling Council Schools, Learning and Education

#### Excursion Approval Form – Risk Assessment

<table>
<thead>
<tr>
<th>Activity</th>
<th>Risk</th>
<th>Control measure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Departure</strong></td>
<td>Communication breakdown resulting in late arrival of pupils/transport for departure time.</td>
<td>Pupils will have been given in advance clear instructions on departure details by the group leader in charge. Staff have issued school mobile number to all pupils to inform of late arrival.</td>
</tr>
<tr>
<td><strong>Transport to and from the Venue</strong></td>
<td>Risk of injury to group, due to road traffic accident on route to and from venue caused by: Negligence of other drivers; Negligence of private car/ minibus driver or faulty vehicle; Severe weather conditions; Behaviour issues of pupils whilst travelling.</td>
<td>Use companies/vehicles authorised/recommended by the Local Authority. Safety guidelines will be issued for pupils and staff to adhere to. Pupils are supervised by members of staff. Weather conditions should be monitored prior to departure. Pupils are instructed to remain seated during transit with seatbelts fastened at all times. Pupils should follow all rules, procedures and safety signage associated with the companies providing transport (aircraft, boat or road).</td>
</tr>
<tr>
<td><strong>Pupil Safety during Excursion</strong></td>
<td>Member(s) approached by someone outside of the group; Member(s) separated from the group.</td>
<td>The aims and objectives of the visit and school rules should be explained prior to the visit. Group discussion on how to avoid specific dangers and why the group should follow all rules and procedures including all safety instructions and signage e.g. use of mobile phones to contact staff, stay in groups of 3. Identify the person responsible for each pupil group and provide mobile phone no. to pupils. Rendezvous and departure procedures clarified with all.</td>
</tr>
<tr>
<td><strong>Care of Valuables</strong></td>
<td>Robbery, mugging, loss of belongings.</td>
<td>Pupils should at all times be vigilant of their own possessions. Pupils will be told not to carry valuables and large sums of cash.</td>
</tr>
</tbody>
</table>

**Excursion to**

**Date(s)** SAMPLE

**Excursion Leader**
<table>
<thead>
<tr>
<th><strong>Code of Behaviour</strong></th>
<th>Pupils not meeting school expectations of behaviour, language and restraint (consumption of alcohol, smoking). Inappropriate behaviour – pupils placing themselves in a compromising situation with other members/non members of the group.</th>
<th>Pupils briefed on behaviour and school expectations. Made aware of consequences of breaching rules/restrictions and how inappropriate behaviour may compromise the success and safety of the excursion.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Terrorism Alerts</strong></td>
<td>National alerts in relation to acts of terrorism.</td>
<td>Pupils will be briefed and made aware of contingency plans and security.</td>
</tr>
</tbody>
</table>
Dear Parent

School Excursion

It is proposed to organize the following excursion in which your child may participate.

The excursion is ___________________________ and will take place on ________________.

Whilst engaging in any school activity, your child will be covered by Schools, Learning and Education Insurance, details of which are available from the school.

Should your child’s co-operation, prior to the excursion, not be to an acceptable level, then they may be removed from the excursion and there will no guarantee of a refund.

A summary of arrangements is given. If you are willing to allow your child to take part please sign the tear-off slip at the foot of this page and return it to the establishments.

Head of Establishment

Please complete and return this portion to

Pupil' Name

Address

I agree to the above child taking part in the school excursion on ________________.

He / she* does / does not* have a medical condition of which the organiser should be aware.

(*Delete as appropriate)

Signed

Relationship

Please note below any appropriate medical condition
<table>
<thead>
<tr>
<th>Purpose</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Method of Transport</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Time and Place of Departure</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Time of return and arrangements for dropping off pupils</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Cost</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Organiser</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Dress Required</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Emergency Staff Contact</th>
</tr>
</thead>
</table>

Return to DofE Centre Co-ordinator at [excursions@stirling.gov.uk](mailto:excursions@stirling.gov.uk).
Schools, Learning and Education

Wolfcraig, Dumbarton Road, Stirling FK8 2LQ

Stirling Council
Phone 01786 404040
Email info@stirling.gov.uk
http://www.stirling.gov.uk

May 2017