Aberdeenshire COUNCIL

From mountain to sea

LIVE LIFE OUTDOORS ABERDEENSHIRE

Offsite Excursion Procedures

Education & Children's Services

November 2026



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1 Introduction

Participants can derive a great deal of educational benefit from taking part in excursions organised under the auspices of their local authority. Excursions give opportunity to undergo experiences not available in the classroom or other learning environments. Visits help to develop a participant's investigative skills, confidence, and self-esteem. Longer visits may encourage greater independence.

Aberdeenshire Council establishments must utilise the online excursion planning, notification & approval system 'Evolve,' where information should be collated and shared for all offsite excursions.

This guidance is designed to help Heads of Establishment, Visit Leaders and others that are involved in the planning and delivery of any off-site excursion, to ensure participants stay safe and healthy on educational excursions. This guidance should be viewed in the context of the Council's broader culture of safety and good practice.

The guidance is underpinned by the Scottish Government framework document *'Going Out There'* which establishes the tone and spirit for the delivery of outdoor learning and outdoor education. The guidance embraces the principles of sensible risk management by seeking a balanced view that considers both the benefits and risks associated with visits and activities.

The following terms are used within this document:

- ❑ The term 'Head of Establishment' is used hereafter to mean the person who carries direct responsibility for authorising the planned excursion and activities.
- ❑ The term 'excursions' is used hereafter to mean all activities which take place outwith Aberdeenshire Council educational establishments
- ❑ The term 'Visit Leader' is used hereafter to mean the person organising & leading the excursion.
- ❑ References to 'parents' is used hereafter to mean parents, carers or guardians.
- ❑ The term 'base' is used to mean school, community centre or any other establishment from which an off-site excursion is organised.
- ❑ The term 'OAE Team' refers to Aberdeenshire Council's Outdoor & Adventurous Education Team. The team provides specialist technical advice, is responsible for ensuring Aberdeenshire Council's Adventurous Activity License is maintained, oversees Approved Adventurous Activity Providers and plays a role in the approval of adventurous excursions & activities. In addition, the team delivers outdoor & adventurous activities to young people & outdoor training to adults.

2 Roles and Responsibilities for Offsite Excursions

Responsibility for health and safety and decisions about excursions, in most circumstances, belongs to the Head of Establishment. The Head of Establishment's agreement must be obtained for all excursions which take place.

2.1 Head of Establishment

Heads of Establishments are ultimately responsible for ensuring excursions comply with regulations and guidelines provided by the local authority and the authority's own health and safety policy.

Excursions will usually be planned and led by a Visit Leader. Heads of Establishment should ensure that the Visit Leader is competent to manage and monitor the risks throughout the visit.

Heads of Establishments should be clear about their role if taking part in an excursion. They should follow the instructions of the Visit Leader who will have sole charge of the excursion.

Within larger establishments many of the functions relating to the management and co-ordination of external visits may be delegated to a senior member of staff.

A checklist is provided in the appendices to assist Heads of Establishments with the process of fulfilling their duties in overseeing excursions. Approval must be given to the Visit Leader via the Initial Approval Request Form.

All Category 5 trips must receive approval from Head of Education (or delegated colleague) before planning stage. Initial Approval Request Form for Category 5 Excursions

While an excursion is taking place, all involved have a responsibility for their own and others health and safety.

2.2 Educational Visit Coordinator

The EVC is responsible for overseeing the planning and management of health and safety compliance for all off-site educational trips, including outdoor learning, extra-curricular clubs and onsite adventurous activities. The EVC plays a role in the review & submission of Evolve forms and also administering Evolve User Accounts. Resources for excursions

2.3 Delegated Members of staff

Where some, or all, of the above responsibilities are delegated to a senior member of staff, the responsibilities must be clearly stated and understood by all concerned. In all cases the ultimate responsibility for the approval, conduct and management of excursions remains with the Head of Establishment

2.4 Visit Leader

The Visit Leader is the named person in charge and has overall responsibility for the supervision and conduct of the excursion and should have regard for the health and safety of the group.

Approval must always be given by a Head of Establishment to a visit leader for a trip to be organised (pre-planning stage), the Visit Leader must seek permission from the Head of Establishment using the Initial Approval Request Form

A Preparation and Planning Checklist is provided to assist Visit Leaders with the process of fulfilling their duties in overseeing off-site excursions.

2.5 Specialist Staff

Specialist Staff are those involved in providing instruction or coaching in specific activities. This could be the Visit Leader, other members of staff or external providers.

2.6 Paid Aberdeenshire Council Staff

Such staff must do their best to ensure the health and safety of everyone in the group and act as any reasonable parent would do in the same circumstances. They should:

- ❑ Do their best to ensure the health and safety of everyone in the group.
- ❑ Follow the instructions of the Visit Leader and help with control and discipline.
- ❑ Speak to the Visit Leader if concerned about the health or safety of participants at any time during the excursion.

2.7 Adult Volunteers

Adult Volunteers on the excursion should be clear about their roles and responsibilities, including child protection issues, during the excursion. Adult Volunteers must:

- ❑ Follow the instructions of the Visit Leader and help with control and discipline
- ❑ Consider stopping the excursion or the activity and notifying the Visit Leader, if they think the risk to the health or safety of participants in their charge is unacceptable.

All volunteers, including those who are employed by Aberdeenshire Council, must complete the Council volunteer enrolment process and may be subject to Disclosure Check dependant on volunteer role.

2.8 Adult Helpers

In some situations, it may be useful to occasionally use Adult Helpers, i.e those who are not formal volunteers but may help with an activity on a one-off basis. Adult Helpers should never be left in sole charge of individuals or groups of young people. They should be clear about their roles and responsibilities during an excursion.

2.9 Participants

The Visit Leader should make it clear to participants they must:

- ❑ Follow the instructions of the Visit Leader and other supervisors including those at the venue of the excursion.
- ❑ Draw the Visit Leaders attention to any distress, concern, discomfort arising during, or resulting from, the activity.
- ❑ Keep a lookout for anything that may harm either themselves or anyone else in the group and inform the Visit Leader

2.10 Parents or Adults with Parental Responsibilities

Parents or adults with parental responsibilities must be able to make an informed decision on whether their child should go on an excursion. The Visit Leader should ensure parents are given sufficient information in writing and should be invited to attend any briefing sessions. The Visit Leader should also tell parents how to best prepare their child for the excursion, for example reinforcing the notified code of conduct. Parents should also be asked to agree the arrangements for sending participants home early, and if necessary, to meet costs incurred. Parents should receive and have discussed with them a copy of the Parents Trip Handbook

Consent form for within the UK can be found in Appendices

Parents should:

- ❑ Complete and Sign the Consent form.
- ❑ Provide the Visit Leader with emergency contact information.
- ❑ Disclose to the Visit Leader all relevant information about their child's psychological and physical health that may be relevant to their participation. (Usually done via the consent form).

2.11 Base Contact Definition

The Base Contact's role is to liaise between the group on Expedition and the outside world. All communications with or from the group should go through this focal point. This person has a crucial role in the safety management system and is appointed by the Head of Establishment. The Base Contact should be familiar with all details of the excursion, remain 'back at base' and be contactable 24hrs a day throughout the duration of the excursion. The Base Contact will stand down once the excursion has returned to base or has been informed leaders are no longer responsible for participants.

3 Evolve

Evolve is a secure online tool for planning and managing educational visits, off-site activities, after school clubs and sports fixtures. This tool has been adopted by Aberdeenshire Council to support the recording, managing and authorisation of offsite excursions.

In addition, where qualifications are held by staff and volunteers to allow them to lead or support the delivery of adventurous activities, these qualifications must be recorded on Evolve in order that Heads of Establishment can check them prior to a trip being authorised, and so they can be accessed during Adventurous Activity Licence inspection visits. Further information here.

3.1 Accessing the Evolve System

Staff who are required to plan an excursion will be given a username and password by the establishment's Evolve Visit Coordinator (EVC)

More than one establishment can be associated with a staff member therefore qualifications need only be entered once.

Evolve further information and log-in

3.2 Evolve Planning and Approval Overview

All offsite excursions must be on Evolve to help ensure trips are well planned, risk assessed, have parental consent, are approved and covered by Aberdeenshire Council's Offsite Excursion Insurance Policy.

For example, the following excursions, as a minimum, must be entered on Evolve:

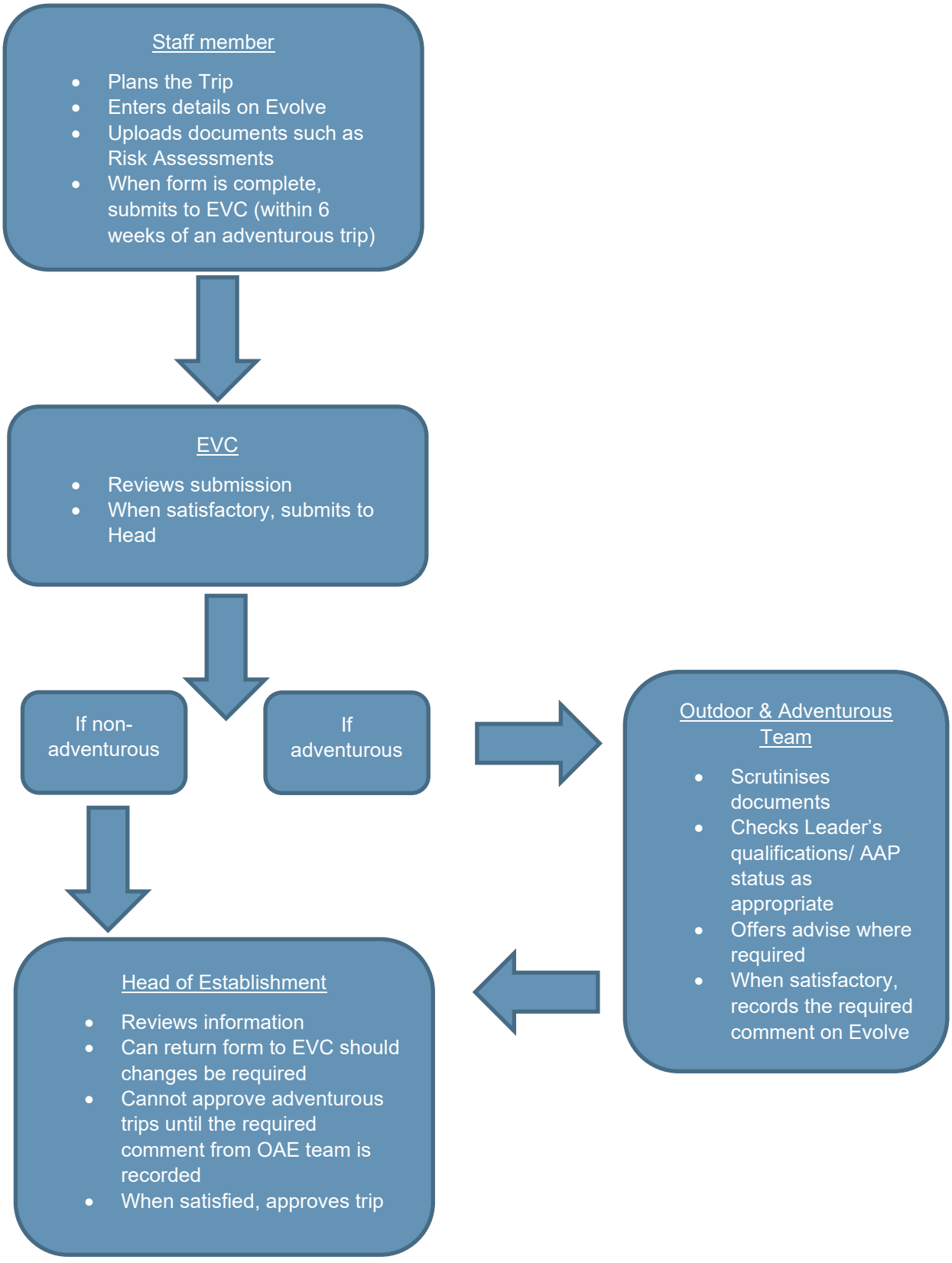
- ❑ Pupil day walks.
- ❑ Trips involving transport
- ❑ Trips involving an overnight stay
- ❑ All adventurous activities (both off-site and on-site)
- ❑ Trips outside the UK

It should be noted that where a trip goes out without being entered on and approved via the Evolve system, it is unlikely that the Aberdeenshire Council Offsite Excursion Insurance Policy will cover the trip.

If staff have any questions regarding the planning of excursions or the use of Evolve they should discuss this with their line manager or establishment Education Visits Coordinator (EVC) without delay and before the trip goes out.

3.3 Evolve Excursion Planning and Approval Structure

The following diagram provides an outline of the basic planning structure used by Evolve when preparing an excursion.



4 Excursion Categories and Staff Ratios

Whether an excursion is to the local park, a canoe expedition or a residential overseas trip, it is essential that formal planning and risk assessment takes place and that it is completed in good time for the trip.

The table below shows how far in advance the trip should be entered on Evolve. This period is a minimum and trips can be entered on Evolve as soon as planning commences. The approval in principle and the support of the Head of Establishment should be sought much earlier than the times shown below.

In most cases, trips will be planned well in advance of the activity date. There will be occasions when an opportunity presents itself at short notice. However, those trips which require 6 weeks' notice to allow for OAE Team scrutiny are unlikely to be accommodated in a shorter period

Category	Authorisation Required	Parental Consent	Period before trip date for Evolve submission
Category 1 Excursions within the UK non-adventurous	Head of Establishment	Annual Parental Consent	2 weeks
Category 2 Excursions within the UK adventurous	Head of Establishment with scrutiny & advice from OAE team	Specific Parental Consent	6 weeks
Category 3 Excursions to Europe, USA or Canada non-adventurous	Head of Establishment	Specific Parental Consent	6 weeks
Category 4 Excursions to Europe, USA or Canada adventurous	Head of Establishment with scrutiny & advice from OAE team	Specific Parental Consent	6 weeks
Category 5 All Excursions to countries outwith Europe, USA or Canada. All exchange visits to any location	Head of Service	Specific Parental Consent	6 weeks

4.1 Deciding Staff Ratios

The level of supervision is decided on a case-by-case basis based on the excursion risk assessment. It is important to have a suitable ratio of adult supervisors to participants for any excursion. The factors to consider include:

- ❑ Gender, age, and ability of group.
- ❑ Those with additional support or medical needs.
- ❑ Nature of activities.
- ❑ Experience of adults in off-site supervision.
- ❑ Duration and nature of the journey.
- ❑ Type of any accommodation.
- ❑ Competence of staff, both general and on specific activities.
- ❑ Requirements of the organisation/location to be visited.
- ❑ Competence and behaviour of participants.
- ❑ First aid cover.
- ❑ Adequate cover to cope effectively with an emergency

When excursions are to remote areas or involve hazardous activities, the risks may be greater and supervision levels should be set accordingly. The same consideration should be given to excursions abroad, or residential visits. Some non-residential excursions with mixed groups will need a mixed gender staffing.

The Head of Establishment is responsible for ensuring and approving an appropriate ratio of adults, including visit leaders and assistants, to children and young people taking part.

Where externally led activities are in place, deployment of staff may change during the day depending on the nature of the activity. Clarification is required where all responsibilities lie. It is important to evaluate the composition of the group and consider the ongoing needs of the individuals. The GIRFEC Practice model can be used to examine and make decisions on the needs of individual children and young people during the off-site excursion. This will support the preparation of a realistic estimate of the staff expertise needed along with the resources & support to enable the objectives to be achieved safely.

Due sensitivity & consideration should be given around inclusion relating to race, religion, gender identity, disability and socio-economic factors in keeping with Aberdeenshire Council's Inclusion and Accessibility Guidance

Due consideration should be given to gender balance. It is recommended that there are always at least two staff accompanying excursions. Be prepared for a situation where a participant or staff member becomes unwell or a participant needs to be accompanied due to an emergency.

Visit leaders should be aware that small parties with minimum staffing are vulnerable if staff and or participants are ill or have an accident during the excursion. This needs to be considered at the early planning stage.

Where Visit Leaders operate alone, the group should be trained/briefed in the actions to be taken in the event of leader incapacitation. An assistant leader, able to look after the group and raise the alarm, should be present if the group would be at significant risk were the leader to be incapacitated.

The longer a visit lasts the more important it is to consider the needs for additional staffing. The constant duty of care is very demanding. Consider the impact of other functions (such as minibus driving) on maintaining alertness and concentration.

The following table is provided for guidance only. The risk assessment carried out will direct the supervision level required for your excursion.

Group	General Off-Site Visits	UK off-site excursion including overnight stay. Without adventurous activities	Foreign off-site excursion without adventurous activities	Adventurous and all non-secure or challenging environments
Nursery under 5	1:2/6	Not Recommended	Not Recommended	Various, determined by risk assessment
P1-3	1:6/8	Not Recommended	Not Recommended	
P4-6	1:8/15	1:6	Not Recommended	
P7	1:15/20	1:8	1:8	
S1-S3	1:15/20	1:8	1:8	
S4:S6	1:15/20	1:10	1:10	

5 Principles of Safety Management

Safety, during off-site activities, must be seen in the context of the Council's broader culture of risk management and safety. Staff must be familiar with those aspects of the Aberdeenshire Council's Health and Safety Policy which are relevant to the planned programme.

Safety relies on a sound framework of planning and organisation, delivered by experienced staff with an appropriate level of competence allied to recognised qualifications, professionalism, experience, and training.

Off-site excursions will not always go according to plan, pointing to the need for flexibility, contingency arrangements and the use of dynamic risk assessment.

5.1 Key Elements of Good and Safe Practice

Listed below are the key elements that support both good and safe practice.

Learning Intentions or Objectives

The Learning Intentions for the programme or event must be clearly stated and understood by all concerned at the start of the planning process.

Risk Assessments

Risk assessments must be completed, signed and dated prior to each event or series of events. The risk assessments must be based on the activity, the composition of the group, the group's ability to undertake the activities including provision for any additional support needs.
It is good practice to carry out and review risk assessments with those leading and participating in the excursion. The person leading the risk assessment process must ensure the Head of Establishment has viewed and accepted all risk assessments, which must be recorded in Evolve and read by all leaders.

Staff Competence

Experienced leadership with the required competences alongside appropriate supervision ratios must be identified in the risk assessment process.

For staff leading adventurous activities it is a requirement of the Adventure Activity Licensing Service that updated evidence of qualifications is kept on file within each establishment. This is carried out using the Evolve system.

Staff Training

To safeguard the physical and psychological health of the people in their care it is essential that staff receive appropriate training for the planning, organisation, delivery, leadership and supervision of the excursion.

Defined roles

Excursion safety is further underpinned by party leaders ensuring that all those involved understand their roles and responsibilities.

Communication

Effective communication strategies, using appropriate media, during all stages of the planned event is key to excursion safety, security, and issue resolution. On occasion it may be sufficient to communicate verbally and at other times written instructions may be necessary. Mobile phones are likely to provide the key communication platform, but it should be noted that signal reliability cannot always be guaranteed.
Satellite phones may be required for groups visiting more remote regions out with the UK.

Where a young person has identified communication needs these should be supported by personalised plans. An example might be where a family's first language is not English.

Planning and Preparation

All aspects of the organisation, delivery, leadership and supervision of the excursion must be carefully planned using the risk assessment template and the Visit Leader & Planning Checklist as development tools.
Ensure flexible plans, contingency arrangements and the potential use of dynamic risk assessments are all in place.

Monitoring and Evaluation

Managers must ensure the integrity of the safety management chain through a monitoring process, checking that the document guidance and good practice is implemented 'on the ground'.

The activity and outcomes should be evaluated to learn from the experience, build staff confidence and competence and inform future planning.

Changes of Plan

Contributing safety factors lie in having pre-planned contingency arrangements and the ability to change or modify the plan if confronted with adverse circumstances or an unavoidable change in the planned activities.

In adverse circumstances, the contingency and emergency plan actions must focus entirely on the safety of all participants and their removal from danger.
In an emergency the priorities are:

- ❑ Prevent/minimise the loss of life and injury.
- ❑ Alert the emergency services as soon as possible.
- ❑ Take control at the scene until the emergency services arrive.
- ❑ Alert as soon as possible relevant parties via the Base Contact; namely the Directorate; Corporate Communications; parents/guardians/carers.
- ❑ Support participants during and after incident.
- ❑ Return to a 'normal' or revised programme if possible.

In non-adverse circumstances, the decision to change the plan should be made consultatively by the Visit Leader and based on the technical expertise and experience within the staffing and a dynamic risk assessment.

In all cases the Visit Leader must notify the Base Contact as soon as possible outlining the planned activity change and its impact on any arrangements. The Base Contact should be informed prior to the change.

Under no circumstances can a plan change involve an activity for which there is no prior planning, approval from Head of Establishment or parental consent.

Where possible the Head of Establishment should be consulted prior to any minor change of plan.

The above underpins the need for the Base Contact to have full travel itinerary, activity and participant details and be available night & day to support in an emergency. The Base Contact should be able to access Evolve to view full details of the excursion.

6 Security

Threat Levels and how you should respond.

Threat levels in themselves do not require specific responses from the public. They are a tool for security practitioners working across different sectors of the Critical National Infrastructure (CNI) and the Police to use in determining what protective security response may be required.

Vigilance is vital regardless of the current national threat level when traveling at home or abroad. This is particularly the case when leading or supporting groups of young people on excursions to cities in the UK or locations abroad.

6.1 Threat Levels - What the threat levels mean

Threat levels are designed to give a broad indication of the likelihood of a terrorist attack.

Threat Level	Meaning
Low	An attack is unlikely
Moderate	An attack is possible, but not likely
Substantial	An attack is a strong possibility
Severe	An attack is highly likely
Critical	An attack is expected imminently

Despite the actual threat level in force at any given time, the chances of being caught up in an attack are low. It is possible however, that when travelling to regions attacked in the past,

or following a recent attack, an excursion might be disrupted by security checks and incidents, communication difficulties when the mobile network is under severe pressure, or limits placed on where you can travel to.

Run Hide Tell

While the chances of being caught up in an attack are low, it is important that young people are prepared and know how to protect themselves if the need arises.

If caught up in an incident, the advice is: **RUN** to safety, **HIDE** if you cannot, and when safe to do so, **TELL** the police what is happening and where you are. This guidance can be applied to many places and situations.

Further government advice

7 Risk Assessments

On any off-site excursion, the safety and security of participants and staff must be the primary objective. Participants must not be put into a position which exposes them to an unacceptable level of risk. Written risk assessments must be completed prior to each event or series of events and uploaded onto 'Evolve'.

7.1 Understanding Risk Assessment

The risk assessment must cover the whole excursion starting with the departure from the establishment, the activity, and the return. Where a specific activity is delivered by an approved provider, it is the responsibility of the provider to share an associated risk assessment.

Risk levels are usually rated as High, Medium, or Low. Where a risk assessment shows a risk as being High or Medium then the planning and implementing of controls must be re-considered to manage this risk down to Low. If this cannot be done, then either that activity or the trip itself cannot be authorised.
The purpose of a risk assessment used as a planning tool is to:

- ❑ Identify the hazards likely to be encountered.
- ❑ Identify hazards you may create because of actions you intend to take.
- ❑ Identify those who are at risk.
- ❑ Identify how risks can be minimised and managed by implementing control measures.
- ❑ Establish appropriate supervision ratios.

The person carrying out the risk assessment must record it, upload it to 'Evolve' and give copies to all excursion leaders and the Head of Establishment for approval. Templates for adventurous activity risk assessments

7.2 Forms of Risk Assessment

Risk assessments should be proportionate, comprehensive, and completed involving staff and participants. This puts the control measures into context actively involving them in the management of their safety.

Where specialised activities entail hazards, or where medical or special needs of participants exacerbate hazards, the Head of Establishment must ensure the hazard is managed with relevant controls.

Where people with additional support needs are participating, reasonable adjustments to activity ratios can be made, in keeping with Aberdeenshire Council's Inclusion Guidance

For all children and young people, using the GIRFEC Practice model will help ensure that the needs of all taking part are recognised and met.
There are three common forms of risk assessment:

- ❑ Generic risk assessment – These identify generic risks attached to certain common and/or repeat activities or excursions. For example, visiting large cities and coach travel. Sample generic risk assessments for the more common activities are provided in the Templates for adventurous activity risk assessments

- ❑ Excursion or location/site-specific risk assessments – These are completed in addition to generic risk assessments to establish and control identified risks that are particular to the planned activity, excursions, or location/site. The composition of the party including medical issues and/or additional support needs will influence this risk assessment.

  Both the generic and specific risk assessments must be uploaded into Evolve and are completed prior to the excursion

- ❑ Dynamic risk assessment – Dynamic risk assessments are a continuous risk management and safety monitoring process ongoing throughout the activity and/or excursion. As a product of continuous monitoring and vigilance by staff and participants, they are less likely to be recorded. Decisions are best arrived following discussion with other staff and participants.

7.3 Repeated Events

Where an excursion is one of a series of similar and regular events (e.g. sports fixtures or off site and outdoor learning events) it may not be necessary to carry out full written risk assessments for every occasion. It is important not to become complacent and a continual process of dynamic risk assessment should take place to monitor safety. Be alert to changes in the hazard profile, the environment, group composition and ability.

7.4 Residual Risk

Risk cannot be eliminated from an off-site excursion or event. The risk that remains, having carried out a risk assessment and implemented control measures, is called the "Residual

Risk". It is important that all those involved, including parents, are aware that a residual risk exists and acknowledge how this will be dealt with by all in the party.

For excursions organised by Aberdeenshire Council establishments, the residual risk should never be higher than "Low". The excursion needs to be re-planned if the risk assessment level is "High or Medium."

7.5 Exploratory Visits

Wherever possible the party leaders should undertake an exploratory visit. This will inform the risk assessment process, establish the suitability of the location and the potential to achieve the learning intentions across the range of participant needs.

If an exploratory visit is not possible then other sources of information should be used to assess the risks.

8 Approved Providers

8.1 What is an Approved Provider?

Aberdeenshire Council has a list of Approved Providers for the delivery of adventurous activities.

An Approved Provider must complete an application process which assesses their suitability to deliver adventurous activities on behalf of the Council. It aims to safeguard all taking part in activities by agreeing how health and safety risks will be effectively managed, and clearly identifying those responsible for ensuring this.

The process assists the Council and managers responsible for participants' health, safety and wellbeing to demonstrate that Providers adequately discharge their legal responsibilities.

Approved Providers are required to submit an application to renew their approved status at the end of each year. All providers are removed from the list until their update has been received and favourably reviewed.

8.2 Scope of Approved Providers

Being an Approved Provider is a requirement for all agencies delivering licensable activities and for providers of a range of other activities where the care and responsibility for young people or adults is being handed over to an external provider.

Should a Leader have any concerns regarding the suitability of an Approved Provider to deliver an activity, they should contact AAP@aberdeenshire.gov.uk

8.3 List of Approved Providers

A register of Approved Providers is available

If an agency is on the Approved Provider list, then an excursion can proceed subject to the normal necessary paperwork associated with planning an excursion.

8.4 What if the Agency is not on the Approved Providers List?

If the organisation is not on the approved list, no further arrangements should be made until approval is in place.

The Outdoor and Adventurous Education Team can advise if alternative organisations providing similar activities are already on the approved list. Alternatively, the Provider can approach the team to initiate the Approval process. It should be noted that this process can take some time and approval is not guaranteed. A Leader hoping to use a new provider should check that an application is in progress well in advance of the activity. All AAP enquiries should be sent to AAP@aberdeenshire.gov.uk

Once a provider is approved, excursions can be arranged with the organisation.

It is essential all leaders using an external provider are aware of their roles and responsibilities. Agreement on exactly who is responsible for supervision of participants and at what times should be clarified, for example the supervision of participants during free time and mealtimes.

9 Adventurous Activities

Adventurous activities are those with a level of perceived risk and for which specialist qualifications would normally be required. Adventurous activities can either be provided by suppliers who are registered on Aberdeenshire Council's list of approved providers of adventurous activities or by suitably qualified and experienced Aberdeenshire staff and volunteers. Overview of activities

Such activities include:

- ❑ All upland, hill, and mountain activities (including skiing) regardless of form of travel.
- ❑ All indoor and outdoor climbing related activities, ropes courses, coasteering, abseiling, Tyrolean traverses, bouldering
- ❑ All water sports and water related activities such as stand-up paddle boarding, sea & river kayaking, open canoeing, rafting, sailing, wind surfing, water skiing, wave boarding, gorge walking, coasteering, and open water swimming.
- ❑ Cycling and mountain biking, both on & off road. (Cycling Proficiency/ Bikeability Scotland is not notifiable).
- ❑ Trekking on horseback.
- ❑ Quads, trail bikes and any form of motorised activities in natural terrain.
- ❑ Airborne activities such as kite surfing, snow kiting, gliding, hang gliding, paragliding, parachuting.
- ❑ Any other activities of an adventurous nature where participants are on water, or more than one metre above the ground and where specialist equipment and qualifications would normally be required to safeguard progress.

10 Residential Excursions

Residential trips put additional demands upon staff in both the planning and supervision of excursions. The Visit Leader must ensure the following:

- ❑ The accommodation has adequate security measures in place. Group accommodation should always be lockable with staff access.
- ❑ The accommodation provider has checked the suitability of staff to work with young people or vulnerable adults.
- ❑ The accommodation complies with local fire regulations and that fire alarm and evacuation procedures are in place, taking account of any participants with additional support needs. This should be indicated in the pre-trip literature provided.
- ❑ Staffing ratios and supervision rotas allow for effective supervision 24 hours per day and has built-in flexibility in the event of a participant requiring a high level of supervision or evacuation.
- ❑ For mixed gender groups there are both male and female staff and that accommodation provides separate male and female sleeping facilities.
- ❑ The group will have exclusive use of the accommodation allocated to them and staff accommodation is adjacent to the group's accommodation.
- ❑ The accommodation is suitable for all participants. See Aberdeenshire Council's Inclusion Policy
- ❑ Measures are in place to provide first aid and outside medical assistance.

Where the accommodation provider is an Approved Provider of adventurous activities the above checks will have been made as part of the council's vetting process and may be assumed.

Where the accommodation provider is also an Activity Provider and group supervision responsibilities are shared between the provider's staff and accompanying establishment staff, the Visit Leader must ensure that there will be a clearly agreed handover of responsibility at the beginning and end of each activity session.

The Leader must orientate participants as to the accommodation layout and brief participants on fire and evacuation procedures.

Ensure participants are briefed on expectations relating to responsibilities of communal living.

11 Excursions Abroad

Overseas Adventurous Excursion training must be attended by any leader of such a trip. Further information here. The Overseas Parental Form must be completed.

11.1 Safety and security

The visit leader must ensure the following:

- ❑ The accommodation has adequate security measures in place. Pre-excursion advice on the security profile for the country must be obtained and all risks considered.
- ❑ Contingency plans are prepared covering emergency response actions including full base and destination country emergency service contacts. Laminated contact information cards should be provided for participants to carry at all times.
- ❑ Staffing ratios to reflect the group composition, location and activities. This may include additional excursion provider staff.
- ❑ Cultural differences acknowledged and participants briefed about local conventions, codes of conduct, laws, dress codes and attitudes to gender and sexual orientation.
- ❑ Awareness of food and drink dangers attached to local foods or drinking water not provided under the excursion arrangements.
- ❑ Insurance Officers are consulted to ensure all activities are covered, including medical treatment and repatriation.

11.2 Currency

Provide advice on security, exchange rates and ways in which to carry money. Where the local culture demands the carrying and use of large quantities of cash, this must be considered as part of the risk assessment and adequate arrangement made for the safety of those on the excursion.

11.3 Medical help

Participants should carry the new UK Global Health Insurance Card (GHIC). In addition, it is advisable to have contingency arrangements to directly pay for treatment if required. https://www.gov.uk/guidance/uk-residents-visiting-the-eueea-and-switzerland-healthcare

Personal medication (including spare quantities) should be carried. Note that some medication requires covering letters of authorisation.

11.4 Visas and Passports

Ensure that all participants have valid passports and visas if required at an early stage in planning. Some countries insist on a “passport held for a period” prior to and after entry.

Travel agent or tour operator booked excursions must only be with a provider who is fully bonded, including ATOL bonding for air travel.

In case of emergency, photocopies or photographs of all travel documentation including visas and passports should be held by the Visit Leader and duplicates available to the base contact.

12 Transport

Aberdeenshire Council has a policy on driving for work called Driving at Work

"Aberdeenshire Council has a duty to ensure employees, and others using vehicles on behalf of the Council, at and in connection with their work, do so safely and are managed in accordance with the legal responsibilities detailed in this policy and the attached Procedure Management of Council Owned Vehicles and Work Related Road Safety and The Use of a Private Owned Vehicle at Work."

13 Insurance

The Council's Public Liability policy will cover any injury or loss incurred by individuals due to the negligence of the council or its employees (including volunteers who are working under the instructions of the council). Refer to Aberdeenshire Council Volunteers Policy.

Aberdeenshire Council has a School Excursion Insurance policy in place, whereby both pupils, staff and volunteers on trips are covered for offsite activities / trips both within the UK and abroad (offsite meaning off the school premises).

Further details can be found at Medical and Insurance Information and in the appendixes School Excursions - Information for Parents and Carers and School Excursions Insurance - Service Information

14 Preparation of Participants

The Leader should consider the preparation required to ensure the trip meets its' aims.

This preparation could be:

- ❑ Behaviour expectations.
- ❑ Cultural awareness
- ❑ Levels of health and fitness required of participants.
- ❑ Information on equipment & clothing
- ❑ Relevant skills and experience

14.1 Behaviour and sanctions

Young people participating in an excursion must be consulted on and agree to a code of behaviour.

Should any participants' behaviour fall short of the agreed code, measures must be clearly set out and the consequences fully explained- including possible removal from the trip.

Such a policy may present both legal and practical difficulties. The circumstances in which this policy will be implemented, and the practical arrangements, need to be carefully considered from the outset.

Should a young person require to be sent home, the Risk Assessment must detail the following:

- ❑ Permission from a parent to send a young person home.
- ❑ An action plan should a parent refuse to co-operate or is unavailable to collect and/or receive the young person.
- ❑ Availability of funds to cover immediate payment of the return fare (even if the parent has signed an agreement that he or she will pay for an early return ticket)
- ❑ Recovery of the early return costs. For example, from parents who may dispute the organisation's reasons for returning the young person
- ❑ Availability of staff & funds should a parent be unavailable to accompany a returning young person.
- ❑ A potential breach of contract where there has been a payment for the excursion.

15 Communicating with Parents

Parents must be fully informed about all off-site excursions involving their children whether these are local and part of the normal establishment's activities or special excursions to faraway places. It is imperative that parents are sent, along with a consent form if required, detailed information about planned excursions as early as possible in the planning process. The information provided must be sufficient to enable parents to make an informed decision about their child's participation and to ensure that participants are properly dressed and equipped for the experience. More complex excursions such as outwith the UK are often best communicated by face-to-face meetings in addition to written communications.

The prior written consent of a parent must be obtained. A Parental Consent Form can be found in Appendix 9

Financial Planning

The Visit Leader should ensure that parents have early written information about:

- ❑ The overall cost of the excursion.
- ❑ The proportion of the overall cost parents will be expected to pay
- ❑ The timetable for payments.
- ❑ The banking and accounting arrangements.
- ❑ The details of how any residual monies left after the excursion will be used or distributed
- ❑ The management & security of cash.
- ❑ The insurance arrangements where significant amounts of cash will be carried.

Financial accounting procedures should be agreed with the Head of Establishment and in line with Council policy. They should be available for inspection by parents on request. A sample Financial Records Form can be found in Appendix 10.

In addition, excursions to countries where the financial infrastructure is not well established, the use of credit cards etc. may not be possible or desirable. Where the excursion members will be carrying large amounts of money, this needs to be made explicit in the risk assessment for the excursion and the arrangements for the management and safe handling of this cash made clear. Specific local advice on security, cash handling, importation of cash and insurance may be required.

There will be occasions when the Head of Establishment feels they must call off a trip at short notice when a situation has arisen (for example terrorism, natural disasters or public health crises) which would have the potential to make the excursion unsafe. The destination might still be available to the group but the Head of Establishment, having taken advice, is of the view that the trip cannot go ahead. When briefing parents on the arrangements and risks of the trip, the outcome of a cancellation where the insurance does not cover the cost of the cancellation, needs to be covered. Appendix 11 contains a handbook aimed at parents and

participants covering all aspects of an excursion. The contents should be discussed fully during any parents' information meeting

16 Emergency Procedures

Leaders with responsibility on an excursion have a duty of care to ensure every reasonable measure has been taken to secure the health, safety, and welfare of those taking part. In the case of children and young people, they also have a common duty to act as a parent would act. Leaders should be fully aware of how to respond to a child protection incident or allegation.

Accidents and emergencies will occasionally occur. An essential part of excursion planning is to anticipate problems that may arise and have clear, understandable emergency procedures.

16.1 External Providers

Organisations providing accommodation, activities or other services involving a duty of care will have their own emergency response procedures. Excursion Leaders must be familiar with these procedures and accept any shared responsibilities.

16.2 Planning for and responding to emergency situations

The principles outlined in this section provide a format for response and communication for Council groups encountering adverse circumstances. They should be used as a framework around which establishments develop their own fully detailed contingency plans.

It is essential to have pre-planned contingency arrangements which are flexible and adaptable. These contingency action plans must focus entirely on the safety of all participants and removal from danger.

The contributing objectives mitigating the effects of the emergency are:

- ❑ Prevent/minimise the loss of life and injury.
- ❑ Alert the emergency services as soon as possible.
- ❑ Take control at the scene until the emergency services arrive.
- ❑ Alert the relevant parties via the Base Contact as soon as possible.
- ❑ Support participants during an incident, and in its aftermath.
- ❑ Arrange return to the trip's excursion base location when safe to do so.
- ❑ Return to a 'normal' or revised programme if possible.
- ❑ Arrange to return home if programme continuation is not possible.

Preparation for a terrorism incident should take the form of:

- ❑ Discussing the trip profile and mitigating actions with the Outdoor & Adventurous Education Team OutdoorExcursions@aberdeenshire.gov.uk
- ❑ Viewing the 'Run—Hide—Tell' video if age range appropriate https://www.protectuk.police.uk/advice-and-guidance/response/stay-safe-film

The effectiveness of all such emergency actions depends heavily upon:

- ❑ Good pre-tested communication links**.
- ❑ Staff familiarity with communications network.
- ❑ Staff familiarity with the contingency/emergency response arrangements.
- ❑ Staff familiarity with their roles and those of others.

**Group call and other electronic mobile telephone contact systems should be incorporated into the emergency arrangements and tested prior to departure and on arrival at the excursion location/country.

16.3 Overdue or delayed excursion

The pre-excursion briefing must cover the base contact's actions in the event of a simple delay or the impact of more serious adverse circumstances. The Base Contact's actions must be proportionate and reflect the incident's level of seriousness.

Agreed contingency arrangements should be activated. Head of Excursion and Base Contact will make these decisions as per council guidance. See appendices for Base Contact Checklist and Head of Establishment and Base Contact training Power Point

16.4 Emergency Response Cards

An Emergency Response Card provides party leaders and their team with a summary of prioritised actions in the immediate aftermath of an accident or other emergency. A laminated copy or electronic copy of the emergency response card with key telephone numbers should always be accessible.

In addition, participants should each carry a small, laminated card with key location details and key telephone numbers. For foreign locations this should be in both English and the destination language for foreign trips.

Differing emergency scenarios will generate different levels of response and follow-up actions. The emergency response flow chart below outlines the different Levels of Emergency and the required communication links during the containment phase. All staff & volunteers leading excursions must be aware of accident & incident reporting procedures.
Accident or Incident Reporting Information

Emergency Response Flow Chart

