Acknowledgement: The following policy and procedures are derived from and follow closely those of the Department of Education and Training of Western Australia and have been formulated also with reference to the policies and guidelines of the Association of Independent Schools of Western Australia.

Excursions, camps and trips are regarded as important ways to enhance learning in a real world environment. Some subjects have a compulsory fieldwork requirement.

The following aspects need to be taken into account before any such activities are undertaken:

- In the planning, the following need to be addressed: safety checks, general medical needs, staff skills and qualifications required, staff/student ratios, staff and other people accompanying, transport, accommodation if necessary, catering, mobile phones, class lists, students with specific needs, emergency procedures, costs.
- Detailed parent information and consent forms.
- Comprehensive health information on students.
- It is now a requirement to ensure adequate indemnity cover in the places and venues utilised. This requirement also extends to transport companies.
- Where private providers are engaged to conduct an activity for the school, they must have an adequate level of insurance cover.

EXCURSION RESPONSIBILITIES, PLANNING AND APPROVAL GUIDELINES

RESPONSIBILITIES OF THE DEAN OF CURRICULUM/PRINCIPAL

1. The Dean or Principal must approve the management plan for the excursion and have a clear understanding of who the Teacher-in-Charge is.
RESPONSIBILITIES OF THE TEACHER-IN-CHARGE

1. The Teacher-in-Charge must take reasonable steps to foresee the potential for injuries and areas of danger in the itinerary of the excursion and then take those precautions that minimise the risks to excursion participants. The yellow excursion document, which includes the Risk Assessment and Management form, must be completed and submitted to the Dean of Curriculum. Further guidelines appear on this form.

2. The Teacher-in-Charge of a proposed excursion must develop an appropriate management plan for the excursion, including reference to:
   - supervision requirements;
   - communication requirements;
   - emergency response plan;
   - insurance and liability; and
   - co-ordination of excursion with other school programs.

GUIDANCE ON PLANNING EXCURSIONS

Introduction

This document contains information that will assist members of staff plan and organise excursions. If the excursion activities include those defined as water or outdoors based, then more stringent supervision and risk assessment requirements apply. This is important to determine relevant staff/student supervision ratios.

Workplace Learning and Work Experience

The requirements of preparing for SWL and Work Experience are specific and outlined in a separate document.

Outdoor and Water Activities

Where an excursion is being planned in a water environment or the activity is outdoors or recreational, the provisions of the Outdoor Education and Recreation Activities Policy prevail. This policy statement outlines key factors to be considered in risk management planning and specifically, supervision arrangements. These are not negotiable.

Activities covered by the Outdoor Education and Recreation Activities Policy document include rock climbing, canoeing, cycling and water based activities. In particular, the provisions of supervision requirements for different types of water also require consideration.

Visiting the Venue

The venue/s where the excursion activities will occur and any accommodation that is relevant should be visited by the Teacher-in-Charge whenever possible. This will assist planning and enable the excursion planner to meet venue providers and such like. It is also an opportunity to collect and discuss relevant emergency plans that will be needed in the detailed planning phase. This is an important factor in risk management.

If a visit is not possible due to distance, a person with knowledge of the environment where the excursion will be undertaken should be consulted.
Insurance Liability

The issue of public liability insurance is central to the planning process. Any venue that is owned by any tier of government has the necessary insurance coverage. Private sector operators and external providers must have the appropriate level of insurance to support the nature of the activity that they will support or manage.

It is a requirement that the provider provides a copy of the relevant insurance coverage for the records of the school. If the school has a current record of the cover, that may be attached, otherwise, the Teacher-in-Charge is to arrange for the provision of the document. If the firm/provider does not furnish a copy of the relevant insurance coverage, they cannot be engaged by the school as a service provider.

Supervision and External Providers

The Teacher-in-Charge assembles a supervisory team of teaching staff that will be able to offer the required level of care to the students. The number of members of the supervisory team will be determined by the tasks to be undertaken, complexity of the activities and the age and number of students. For an overnight excursion, female supervisors must be used.

If the school is unable to provide a sufficient or expert supervisory team, an external provider may be engaged. The staff of the provider are to have a National Police Clearance and a WWC check. The provider must also have the required level of public insurance liability and furnish a copy of the insurance document.

Risk Management

The Teacher-in-Charge must complete a risk management assessment of the activity. The Risk Assessment part of the Excursions form is used to conduct and report on the risk management planning associated with the excursion.

This allows the staff member responsible to identify areas of risk and the ways in which they can manage these foreseeable risks to achieve the safest possible outcome for all participants. In most instances, teaching staff are expected to have a greater awareness of the perceived risks involved in an activity or excursion than the general public would have for the same activity.

The Risk Assessment and Management will involve careful planning. For a particular activity that will be repeated within the same school year, with the same group of students, the Initial Risk Assessment and management can apply to these subsequent activities. Any change to location, equipment, environmental conditions, student group or supervising staff will require a new Risk Assessment and Management form to be submitted.

The completed form is to be discussed with the Dean of Curriculum. By signing the form, the Dean of Curriculum approves the excursion on behalf of the school and accepts the risk associated with the activity on behalf of the school.

Completing this form in no way reduces your responsibilities to the actual duty of care as a teacher on this or any excursion. Failure to identify a known risk will result in the rejection of the application. Identification of a subsequent risk whilst in the process of carrying out the excursion or activity must likewise, IMMEDIATELY be assessed and MANAGED to maintain duty of care. There is NO leeway with avoiding responsibility for known or observed unmanaged risks.

The risk management planning influences the equipment that may need to be taken and the staffing.
A complex excursion may require a more detailed, separate risk management plan. This will need to be discussed with the Dean of Curriculum during the planning phase.

**Medical and Special Needs Students**

The Teacher-in-Charge is to ensure that medical details are obtained for each student from the medical centre. In the permission letter, parents should be asked to advise the school if there is any change in status of the health records held by the school. For all excursions, the medical records of students with special health concerns and the telephone contact for all parents is to be taken by the Teacher-in-Charge.

Where the excursion is overnight, the Teacher-in-Charge is to ensure that the medical records and a telephone contact for all parents is taken on the excursion. A copy of the excursion programme, including details of staff, activities, transport, accommodation and names of students involved is to be left with the Principal.

Where students have special needs, these are to be considered in the planning phase. This may mean that provisions have to be made for the welfare of the student. If this entails the provision of prescription medicines, guidance should be sought from the School Nurse. It may be necessary to take an extra staff member or a suitably trained person on the activity.

If transport details are left to parents to arrange, times to leave and collect students should clearly be specified. Staff are responsible to ensure that students are collected and can not leave the venue until all have been accounted for.

**Overnight Excursions and Alcohol**

Staff working on an overnight excursion are not to consume alcohol. This includes all staff, including volunteers. The Teacher-in-Charge is not to divide the group into an “on duty” and “off duty” group and allow the “off duty” group to consume.

If there is an incident, all staff must be in a fit state to respond and be able to be deployed by the Teacher-in-Charge.

**Medical Arrangements and Excursions**

Where an excursion is conducted over night, medical forms must be taken and a copy provided to the Principal. Parent contact details are to be provided to the Principal.

**Interstate and International Excursions**

These excursions require special approvals. All the above risk management needs to be undertaken, but there may be more detailed requirements than usual excursion arrangements. Please see the separate planning guidelines.

**Two additional forms are available as guidelines and a checklist for use by staff before an excursion:**
- Excursion Organiser
- Checklist for Excursion Management Plan

The Dean of Curriculum or Principal may ask for a copy of the checklist if they feel they need further evidence of planning and risk assessment.
EXCURSION ORGANISER
(from DET guidelines)

1. **Numbers**
   1.1 How many students?
   1.2 Are staff required to supervise water-based or outdoor activities? How many?
   1.3 How many staff are required? (Rule of thumb: 20:1 plus 1 other)
   1.4 What will be the make-up of the supervisory team? Sufficient people and staff with relevant skills?
   1.5 Do I need an external provider to assist with the conduct of the excursion? Get quotes.

2. **Transport**
   2.1 Buses – organise through Admin.
   2.2 Cost – hire and fuel.
   2.3 First aid kit to be available on the vehicle?
   2.4 How many kilometres do you expect to travel?
   2.5 Are private vehicles attending? Are they roadworthy? Are the drivers licensed? Do the students have permission to travel in a private vehicle? Are any payments involved?
   2.6 Do you need a trailer?
   2.7 Is it a one day excursion over 300km return? If so then two (2) drivers will be required per vehicle.
   2.8 If using a private transport company, does it have a $5 million public liability insurance policy? Obtain a copy of the insurance cover (this should be checked through Admin).

3. **Accommodation (if relevant)**
   3.1 Where will you stay? Is this accommodation safe (eg. fire safety exits unlocked)? Does it have drinkable water? Are the kitchen facilities clean and adequate?
   3.2 Are smoke detectors fitted? (If not, the school is to provide.)
   3.3 Have you obtained quotes for accommodation?
   3.4 Cost per Head? Staff? Students?
   3.5 Are there booking fees?
   3.6 Do you need a deposit? Have you arranged payment of the remainder?
   3.7 What are the requirements in terms of food, clothing, bedding and other needs?
   3.8 What are likely problems with student supervision?
   3.9 If using a private company, does it have the required level of public liability insurance cover? If not, use another company. If yes, obtain a copy of the insurance cover.

4. **Costs**
   4.1 Student fee should cover staff costs. For example - if the total staff costs are $200.00 and you have 20 students on camp then you need to add 200/20 = $10.00 per student.

5. **Food**
   5.1 Will the accommodation site cater for meals?
   5.2 How much per meal per head?
   5.3 Do you have to supply your own food?
   5.4 What cooking facilities are there?
   5.5 How will you get the food you need, who will buy it?
   5.6 Have you accounted for purchased meals? Are parents aware?
   5.7 How will payment be arranged?
   5.8 Who will cook? Who will clean up?
   5.9 What about special dietary requirements? Check with students and staff and make sure this can be accommodated.
6. Activities
6.1 Where are you going? A timeline/programme has been compiled?
6.2 Can you get group discounts or staff concessions?
6.3 Is there parking for buses?
6.4 Is the activity suitable for your students’ age group?
6.5 Do you need permission forms for the activity?
6.6 Have the venues and equipment been booked?
6.7 Have you advised students of dress standards required?
6.8 Is an external provider conducting the activity? If so, does the provider’s staff have National Police clearances WWC checks and adequate liability insurance?
6.9 Who will supervise and what will students do during non-activity times? Do you require sports equipment?

7. Emergency Contingencies
7.1 Medical emergencies? Medical Form signed by parents? For overnight stays, the Teacher-in-Charge must take the medical forms and parent contact numbers with them on the excursion.
7.2 Have you got the emergencies procedures for accommodation and activity venues?
7.3 Discipline policy – sending students home?
7.4 Acts of God? Theft of gear?
7.5 Medical kit has been checked and taken?
7.6 Students and parents have been made aware of possible dangers and expected behaviour to avoid accidents?
7.7 Do you have a set of camp rules?

8. Parental Permission
8.1 Documentation prepared to go home outlining excursion and activities? These have been discussed with the Dean of Curriculum if there are concerns?
8.2 The excursion outline to parents and the permission to participate forms have been sent home?
8.3 Permission and medical forms signed and returned?
8.4 Itinerary and contact numbers given to parents and admin?
8.5 Students with special needs have been identified and considered?

9. Planning Requirements
9.1 Cost sheets has been completed?
9.2 Insurance forms have been obtained from all transport companies, venues and providers where relevant and are attached to the approval proformas?
9.3 Permission has been granted by the Dean of Curriculum/Principal?
9.4 The approval proformas have been finalised and the Checklists completed?
9.5 Copies of excursion programme and lists have been given to the Principal?
9.6 Has the Dean of Administration been advised of who will be attending the camp? Have the teachers attending completed the relevant supervision required form?
9.7 Have you left adequate work for relief lessons while you are away?
9.8 Do you require emergency communications such as a school mobile or satellite telephone?
9.9 Is air or interstate travel involved? See Principal/Dean of Curriculum for details of requirements.
10. School
   10.1 List of students attending left at front office?
   10.2 Contact phone number?
   10.3 Approximate time of arrival back at school on what day? If possible, telephone the school to confirm arrival time.
Checklist for excursion management plan (from DET guidelines)

PURPOSE OF THE EXCURSION
The educational purpose of the excursion is described.  

1. ASSESS THE RISKS

1.1 Assess the environment
The site has been assessed and is considered to be appropriate for the excursion.

1.2 Assess transport arrangements
Arrangements have been made for the safe transport of excursion participants.

1.3 Assess the students’ capacity
Excursion activities are suitable for the students’ capacity.

Provision has been made for any student with special needs.

Up to date information regarding student health care maintenance and/or intensive health care needs has been obtained.

1.4 Assess the capabilities of the supervisory team
Collectively the supervisory team has the skills to:

- identify and establish a safe activity environment
- effect a rescue and/or render emergency care
- monitor weather and environmental conditions before and during activities
- monitor the physical well being of the students

1.5 Assess the involvement external providers

Competence of external providers is established.

External providers conducting activities with students have a current working with children check card and national police certificate.

Staff responsibilities of the school and venue have been established.

External providers hold the appropriate level of public liability insurance.

2. ESTABLISH SUPERVISION STRATEGIES

Supervision strategies have been established.
3. **PROVIDE INFORMATION AND SEEK CONSENT**
Parents/guardians of student participants have been provided with full details of the excursion.

Student participation is subject to receipt of the signed consent form.

4. **DEVELOP COMMUNICATION STRATEGIES**
Appropriate methods of communication, including emergency signals, have been developed.

5. **COMPLETE EMERGENCY RESPONSE PLANNING**
An appropriate emergency response plan has been developed or obtained.

The teacher-in-charge has a list of the names of participating students, contact telephone numbers, student medical information and relevant health information of supervisors.

6. **BRIEF STUDENTS AND SUPERVISORS**
Students and supervisors have been/will be fully briefed on responsibilities and obligations.

7. **RETAIN EXCURSION RECORDS**
Relevant excursion details will be retained.

8. **GAIN APPROVALS**
Appropriate approvals have been gained.

---

**Teacher-in-charge**  __________________________  **Date**  ____________

---

*I am satisfied that the management plan for this excursion meets the requirements of the Excursions policy. I approve this excursion.*

**Principal/Dean of Curriculum**  __________________________  **Date**  ____________