

POLICY FOR MANAGEMENT  
OF OFF-SITE EXCURSIONS AND ACTIVITY  
FOR SCHOOLS, OTHER EDUCATIONAL ESTABLISHMENTS AND  
COMMUNITY EDUCATION GROUPS  
**FORM DESIGNATIONS IN PART TWO**

**FOR LEVEL 1 & LEVEL 2 EXCURSIONS (GREEN) Section 1**

- EX A1** Leader & Head's Checklist
- EX A2** Head's Approval
- EX A3** Post Excursion Evaluation Form

**FOR LEVEL 3 & LEVEL 4 EXCURSIONS (YELLOW) Section 2**

- EX B1** Leader & Head's Checklist
- EX B2** Head's Approval
- EX B3** Service's Approval
- EX B4** Post Excursion Evaluation Form

**PROVIDER FORMS (PINK) Section 3**

- EX C1** Facility Provider Form
- EX C2** Service Provider Form
- EX C3** AALS Licensed Activity Provider Form
- EX C4** Unlicensed Activity Provider Form
- EX C5** Accommodation Provider Form
- EX C6** Unapproved Transport Provider Form
- EX C7** Driver of Hired/OIC Vehicles Approval Form and Checklist

**USER FORMS Section 4**

- EX D1** Excursion Consent
- EX D2** Medical Information
- EX D3** Leader Emergency Information
- EX D4** Emergency Contacts
- EX D5** Party Members
- EX D6** Missing Person
- EX D7** Risk Assessment
- EX D8** The Service's Serious Accident Procedures (LEADERS)
- EX D9** The Service's Serious Accident Procedures (OFFICIALS)
- EX D10** International Visit Approval Form (NEW)

**GOOD PRACTICE GUIDES (BLUE) Section 5**

- GP 1** Beaches, Foreshores & Coastal Walks
- GP 2** Swimming, Wading or Paddling
- GP 3** Farm Visits
- GP 4** Internal Ferry Journey
- GP 5** Resource Files & Generic Assessments
- GP 6** Risk Assessing
- GP 7** Responding to an Accident
- GP 8** The Evidence Trail
- GP 9** Carry Cards
- GP 10** Financial Guidelines for Excursions (NEW)
- GP 11** Summary of OIC Insurance (NEW)

Last modification October 2010

# POLICY FOR MANAGEMENT OF OFF-SITE EXCURSIONS AND ACTIVITY FOR SCHOOLS, OTHER EDUCATIONAL ESTABLISHMENTS AND COMMUNITY EDUCATION GROUPS



## **MANDATORY FORMS**

### **LEVEL 1 AND 2 EXCURSIONS**

A1, D7 and itinerary/letter - to be submitted by leader to Head for final approval. Head must check individual boxes.

A2 - Completed by Head and submitted to Service prior to excursion (for notification only)

D1, D2, (D3 if appropriate) , - accessed by group leader prior to, and during the excursion. Copies to be carried or information to be carefully distilled and collated.

D8 always carried; D9 carried when off Orkney or remote

A3 – is completed by a leader after excursion and included with all other paperwork and kept on file within the Establishment.

### **LEVEL 3 AND 4 EXCURSIONS**

B1, D7, Itinerary/letter - to be submitted by leader to Head for interim approval. Head must check individual boxes.

B2 - completed by Head

B1, B2, D7, itinerary/letter - submitted by Head to Service prior to excursion.

B3 - Completed by Service, returned to Head prior to excursion (final approval)

D1, D2, (D3 if appropriate) - accessed by group leader prior to and during the excursion. Copies to be carried or information to be carefully distilled and collated.

D8 always carried; D9 carried when off Orkney or remote.

B4 - is completed by a leader after excursion and included with all other paperwork and kept on file within the Establishment.

D10 – to be used for all international visits.

## **NON MANDATORY FORMS**

Other forms in Part 2 are non-mandatory and are used at the direction of the head or discretion of the leader to ensure suitability and safety of the excursion.

The Service advises the use of the non mandatory forms EX C1 to EX C 7, which should always be used in circumstances where the safety and suitability of facilities, activity locations, activity providers, transport companies or leaders information is unknown, being used for the first time or when specific details and confirmation is required.

The Service advises the use of the non mandatory forms EX D4 to EX D6 to assist the leader during the planning process and enable important excursion and emergency information to be clearly laid out and organised.

The Service advises that all Form Notes are carefully read through.

Good practice, record keeping and filing of all paperwork used before, during and after each excursion is expected, and will be audited by the Service

In circumstances where there is incomplete information regarding the provider's suitability or when information is not easily understood by all excursion leaders, then non mandatory forms should be used.