



Catholic Schools Office  
Diocese of Broken Bay

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OVERSEAS AND INTERSTATE  
EXCURSIONS POLICY  
FOR  
DIOCESAN SYSTEMIC SCHOOLS

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OPERATIONAL POLICY

Diocese of Broken Bay  
May 2005



**PURPOSE**

The Catholic Schools System recognises the additional responsibility and level of care that must be undertaken when students are taken by their school interstate or overseas. This policy is intended to clarify requirements for the planning of excursions of this nature to ensure that legal obligations are met and that our Catholic values are upheld in what is undertaken. It will also provide a formal procedure for obtaining the necessary approval for excursions of this kind.

**POLICY FRAMEWORK**

While recognising that excursions that involve travel interstate or overseas can have significant educational benefits, the Catholic Schools System is aware that such activities can be disruptive to academic study, both for students undertaking the excursion and for those students whose teachers are participating and are therefore absent from school. It also places additional financial pressures on parents. In considering whether to proceed with an excursion of this type, the Principal and the Director of Schools must weigh carefully the educational value of a proposed excursion, with the total needs and resources of the school and the financial burden for families of students. Approvals should be limited to excursions that will provide students with significant educational opportunities not available by other means.

In planning excursions Principals and staff need to be conscious of the legal and moral responsibility for student welfare that they accept. Arrangements for care and supervision must reflect the greater degree of risk to students that can exist when travelling long distances within Australia or visiting overseas destinations.

**POLICY CONTENT**

It is essential that the requirements for organising an interstate or overseas excursion are followed strictly.

**Basis for Offering Excursions**

Overseas or Interstate excursions must have an educative purpose. The educational worth of such an excursion must be carefully assessed, especially in relation to the context of other events on the school and Diocesan calendar.

Principals need to ensure that all parents are aware that such excursions are approved school activities and that staff are acting as employees whilst on such excursions and will be required to exercise appropriate duty of care.



Staff members **choose** to take part in such excursions. No obligation is to be placed on them to participate in or to organise such an excursion. No extra remuneration, other than reimbursement of genuine pre approved expenses is to be paid in respect of such excursions.

Unless exceptional circumstances prevail, the School will not support more than three major tours per year. The financial drain of such tours on parents should not be under-estimated.

### **Travel Advisories**

The Department of Foreign Affairs and Trade's website:

[www.dfat.gov.au](http://www.dfat.gov.au) should be consulted for travel advice generally and, in particular, for details about countries where travel is not recommended. This check should be done prior to submitting the proposal to the Principal and again two weeks before the departure date.

Notwithstanding the above, at any point the trip may be cancelled or varied in response to advice provided by the Department of Foreign Affairs.

### **Preparation Time**

Any such planned excursion must have at least 4 months notice for interstate tours, 6 months notice for SE Asia and New Zealand travel and 18 months notice for excursions beyond SE Asia.

### **Approval Procedure**

When it has been determined there is an educational need for an Overseas/Interstate excursion, the person planning the event must ensure all necessary requirements are met in relation to budget and number of supervising teachers to support the number of students attending. A risk assessment of the proposed excursion must be undertaken.

A formal proposal must be presented to the Principal for approval prior to the event being advertised. An itemised budget and a risk assessment must be attached to the proposal. The form to be used for the formal proposal is set out in Attachment A. The form for the budget is set out in attachment B. If the Principal approves the proposal, it must be sent to the appropriate Schools Consultant.

The Consultant will consider the application together with the budget and risk assessment. If the Consultant is satisfied that the application has educational worth, has been well planned, and the



requirements of this policy have been met, the Consultant will refer the proposal to the Director of Schools. The Director is responsible for deciding whether the excursion may proceed. No proposed excursion is to be advertised within the school community until it has the formal approval of the Director.

Principals should ensure that costs are maintained at a moderate level in order to make such excursions accessible to students. Excursions, which would place financial pressure on a significant number of families, should not be undertaken.

### **Risk Management Process**

Risk management is a process consisting of well-defined steps which, when taken in sequence, support better decision making by contributing to a greater insight into risks and their impacts. Risk management processes are used to identify hazards and to assess and eliminate or control risks associated with activities. The five essential steps of the risk management process are: risk identification, risk assessment, risk elimination or control, communication of the risk management plan and monitoring and review. Applications for overseas and interstate excursions must be inclusive of risk assessment documentation which has been reviewed by the Principal. Principals should ensure that such documentation is retained to assist with future planning of excursions.

### **Staff Fares**

Proposals must show how the fares of tour organisers, leaders and other accompanying adults are to be met. Students' participation costs are not to be increased to cover the costs of these organisers, leaders and other accompanying adults without express written acknowledgement of the parents of the participating students.

### **Students with a Disability**

The Disability Discrimination Act makes it unlawful for a school to subject a student to any detriment on the basis of his / her disability. (See 12.4.6.7 Systemic Schools Handbook). This may be significant if for example a tour is offered for all students taking a particular course, if one of those students suffers from a disability. All reasonable efforts must be made to enable disabled students to attend excursions with their classes, including thoughtful selection of excursion venues and activities in the first instance.



### **Financial Accountability**

The school's financial officer is to provide guidance about setting tour budgets, and maintaining books of account and records.

Monies not paid directly to the travel agent must be kept within the School's accounting and banking system, as arranged with the financial officer.

***A separate bank account must not be opened and under no circumstances should any funds be placed in or processed through a private bank account.***

Whilst on the excursion, the tour leader must keep a daily record or activity sheet briefly recording travel details, activities undertaken and appropriate daily roll calls. The tour leader must also ensure receipts are kept for all activities, fares, meals etc. These receipts will be required to support the accounting records for audit by the financial officer on return.

The Financial Officer is to audit the accounts within 30 days of the completion of the excursion and report to the Principal.

### **Travel Agents**

When selecting a travel agent to arrange travel for the tour, staff must obtain at least three quotes from licensed travel agents before selecting the successful travel agent.

Staff intending to organise travel for students must take note of the following legal advice from the Ministry of Fair Trading.

Schools may be able to arrange **some** travel for students without breaching the Travel Agents Act ("The Act"). The extent to which a school carries on the activity of arranging travel will ultimately determine whether or not they are "carrying on business" as a travel agent without a licence, in breach of the Act. The risk of breach can, however, be minimised by engaging the services of a licensed travel agent whenever practicable.

Where a school intends to engage the services of a licensed travel agent they should engage the agent **before** taking any money from students and obtain the agent's agreement to the school receiving and holding that money as agent for the travel agent. Alternatively, all monies should be paid directly to the travel agent. In this way,



students monies are “protected” by the Travel Compensation Fund should the travel agent or school fail to account for the money. Monies received from other sources, e.g. through general fund raising, should be held in a separate account by the school as this will not be protected by the Fund. This means all monies will pass through the school’s normal CCDF bank account but the activity will be allocated a separate account number in the books of the school.

### **Insurance**

Travel insurance must be arranged through the school’s insurers, CCI, before any non-refundable bookings are made. Catholic Schools Office guidance is to be obtained to establish appropriate cover.

The insurer must provide cover in the event that the trip is cancelled at short notice in response to advice provided by the Department of Foreign Affairs.

### **Passports & Visas**

Where the excursion is to another country or countries, the staff member responsible for organising the excursion and the Principal must check each participant’s passport and visas (when required). Passports must be current. Any visas required must be valid for the dates of the tour. If more than one country is to be visited more than one visa may be required.

Principals should be aware that for students traveling on non-Australian passports there may be different visa requirements, including the need for a visa to reenter Australia.

### **Student Expenditure on Tour**

It is recommended that personal spending money is taken in the form of travelers cheques. It is expected that each student should have issued in their own name, travelers cheques to cover expected expenditure that is unable to be covered prior to departure by school cheque. The student should be responsible for their own cheques and be instructed in their use. Students may also be advised about the availability of automatic teller machines whilst on tour, along with the associated security measures.

### **Medical Forms**

An updated school medical form must be obtained for each student tourist and taken with staff on the tour. Prior to departure the staff member organising the excursion must read each medical form so that



he/she is aware of potential medical emergencies that may arise such as asthma attacks or serious allergies. An appropriate plan of action in such an event should be discussed with the Principal prior to departure.

Attachment C contains a model medical and parent consent form.

### **Medications – Overseas Destinations**

The Tour Organiser must ensure he/she has a medical certificate to cover any medication being taken on tour. This will necessitate the student/teacher/helper taking the medication, obtaining this certificate from their medical practitioner. The medical practitioner will need to check that the particular medication is permitted to be brought into the country concerned.

Secondary students should be responsible for their own medication. With primary students parents should be consulted and the agreed decision be recorded on the medical form - see Attachment C.

### **First Aid**

At least one adult member of the touring party must have a current qualification in First Aid and CPR.

### **Emergencies**

There must be a plan of action and agreed notification procedure approved by the Principal prior to departure, in case of illness, accident or other emergency. See Attachment D for an Emergency Contact Information form.

### **Final Plans**

Details of final itinerary, insurance details, rules, medical forms, emergency contact details (phone, fax etc), a full list of all students, teacher and helper names and addresses and any other related documents must be lodged with the Principal and Consultant at least two weeks prior to departure.

### **Report**

Upon completion of the tour, a summary report must be submitted to the Principal together with any photographic or film record which may be required for the school magazine or website.



**Alcohol**

Alcohol must not be consumed by teachers or helpers whilst on tour and in control of students. The students' welfare is to be considered at all times. Students must not be served alcohol under any circumstances.

**Appropriate Behaviour**

Students should be instructed on appropriate behaviour, as they are ambassadors of the country, the Diocese and the school whilst they are on tour. Any grossly inappropriate student behaviour must be reported to the Principal and to the Director of Schools via the Consultant.

Arrangements need to be in place to facilitate the return to their parents of any student who exhibits behaviour that seriously endangers themselves or others. Written confirmation from parents must be obtained to acknowledge agreement to the arrangements proposed.

**Child Protection Requirements**

The legislative requirements relating to mandatory reporting under the CYPCP Act and the requirements relating to prohibited employment will need to be considered and procedures set up to ensure compliance.

**Fringe Benefit Tax Implications**

Where staff do obtain funding for such a trip then they should be aware that Fringe Benefit Tax may apply to any portion of the trip that is not part of the group itinerary. A full travel diary, noting each work activity, the nature of that activity, the duration, where and when it took place and the date the entry was made, and all relative receipts, will need to be kept to substantiate the non-payment of Fringe Benefit Tax.

An employee declaration must be obtained in all cases where appropriate receipts are not provided. It is expected that this would be the exception. A copy of the travel diary and employee declaration for each funded teacher is to be kept on the school file for audit purposes.

**RELATED LEGISLATION, POLICIES AND PROCEDURES**

*Creating Safe and Supportive School Environments – Child Protection Policy for Diocesan Systematic Schools, Diocese of Broken Bay, November 2004*

*Occupational Health and Safety Policy for Diocesan Systematic Schools, Diocese of Broken Bay, February 2002*

*Pastoral Care Policy for Diocesan Systematic Schools, Diocese of Broken Bay, August 2000*



*Child Protection Code of Professional Standards for Catholic School Employees (CCER, 2004)*  
*Protecting and Supporting Children and Young People – Guidelines for Catholic Schools in the Diocese of Broken Bay (2004)*


**POLICY RESPONSIBILITY**

The contact person for implementation of this policy is the Consultant - Secondary Schools.

**POLICY REVIEW**

This policy will be reviewed within 12 months of its date of adoption and thereafter not less than once in every three years.

Date of implementation:	November 2003
Date of first review:	November 2004
Date of next review:	December 2007



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**Br Tony Whelan cfc**  
Director of Schools



**Attachment A**

**APPLICATION FOR OVERSEAS OR INTERSTATE EXCURSION**

School: \_\_\_\_\_

Destination of excursion: \_\_\_\_\_

Organiser: \_\_\_\_\_

Organiser's position on staff: \_\_\_\_\_

Dates of proposed excursion: \_\_\_\_\_  
*(if includes any school days explain why cannot be run in school holidays)*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Description of trip including any outdoor activities:  
*(please attach draft itinerary including travel arrangements)*

\_\_\_\_\_  
\_\_\_\_\_

Purpose of trip: *(including curriculum context, educational value)*

\_\_\_\_\_  
\_\_\_\_\_

**DETAILS OF STUDENTS:**

Number in group: \_\_\_\_\_

Sex: \_\_\_\_\_

Year Group: \_\_\_\_\_

Cost *(budget attached)*: \_\_\_\_\_



Risk assessment summary: *(please attach full assessment)*

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Names of other adults attending:

_____	Teacher / Parent / Other (specify)
_____	Teacher / Parent / Other (specify)
_____	Teacher / Parent / Other (specify)
_____	Teacher / Parent / Other (specify)

Name of adult with CPR/First Aid qualification:

\_\_\_\_\_

Date of expiry of qualification:

\_\_\_\_\_

Students to subsidise cost of staff/helpers' travel?

Yes / No

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Dress: *(school uniform / mufti)*

\_\_\_\_\_

**Approved by**

**Date approved**

Principal

\_\_\_\_\_

Consultant

\_\_\_\_\_

Director of Schools

\_\_\_\_\_



Attachment B

**BUDGET FOR OVERSEAS OR INTERSTATE EXCURSION**

Name of staff member organising excursion: .....

Year group and subject: .....

Date of excursion: ..... to .....no. of days .....

Destination:.....

Number of students: .....

Allowance for non-attendance: (*cancellation cost*) .....

Hardship student/s: .....

Number of paying teachers/helpers: .....

Method of travel: .....

Fare cost per student: \$ .....

Accommodation cost per student: \$ .....

Meals per student: \$ .....

Other entry costs etc: \$ .....

Travel/medical insurance costs: \$ .....

**TOTAL COST:** \$ .....

Other spending money required: \$ .....

Total cost per student: \$ .....

**Suggested charge per student:** \$ .....

Organiser: (*print name*) .....

..... signature: .....

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Inspected and approved by:

Financial Officer .....

Cost to be charged per student: .....

Signature of Co-ordinator: .....

Approved by Principal:..... date: .....



**Attachment C**

**OVERSEAS/INTERSTATE TRAVEL  
PARENT AUTHORITY AND CONSENT FORM**

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I .....parent/guardian of .....  
hereby:

1. Give permission for .....to attend the  
.....Tour in .....20.....
2. Consent to my child travelling on or in any form of public or private transport where such transport is deemed by the school to be necessary or desirable.
3. Consent to my child participating in all activities, outings, excursions and functions arranged.
4. a) Consent to the school by its servants or agents seeking such medical or dental advice on behalf of my child as seen fit in the event of accident or illness and if in the opinion of an attending medical or dental practitioner or medical officer my child requires medical or dental attention or treatment including but not limited to the administration of anaesthetic, blood transfusion or the performance of any surgical operation, to such medical or dental practitioner or medical officer giving such attention or treatment, provided that reasonable efforts are made to inform me of any serious injury or illness.  
b) Certify that the consent which I have given in paragraph (a) is valid at all times while my child is in the custody of the school attending or participating in an outing, excursion or function.
5. Certify that I understand that the school will take reasonable care in the event of my child suffering accident or illness but that it will not be responsible for the costs of any medical or dental attention or treatment administered to my child in such event nor will it be responsible directly for any act or omission of any medical or dental practitioner or medical officer attending or treating my child.
6. Certify that if my child should bring or consume drugs, alcohol or cigarettes or otherwise exhibit behaviour that seriously endangers themselves or others, I will bear the cost of the return flight home.



**Please answer the following medical questions about your child:**

1. Date of birth: .....

2. Medicare number: .....

3. Private health insurance:.....

Membership no: .....

4. Ambulance cover: Yes / No

5. Is your child in good health? Yes / No

6. Does your child suffer any chronic illness, disability or allergy? *If yes, please explain* Yes / No

.....  
.....

7. Has your child suffered from any acute illness in the past four months? *If yes, give details* Yes / No

.....  
.....

8. Has your child been treated by a doctor in the past four weeks? *If yes, please attach a medical certificate outlining treatment, and stating that the participant is fit to attend tour* Yes / No

.....  
.....

9. Has your child had any major surgery? *If yes, please specify* Yes / No

.....  
.....

10. Does your child need to take any form of medication on the trip? *If yes, please provide details (dosage, frequency etc)* Yes / No

.....  
.....



**(Primary students only)**

The medicine is to be kept by the student / nominated staff member.

11. Do you give permission for Panadol to be administered, if required? Yes / No

12. Has your child had the Diphtheria Tetanus Toxoid booster injection? Yes / No  
If yes, in what year? .....

13. Does your child have any special dietary requirements? Yes / No  
If yes, please provide details

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**Emergency contact in the case of accident or illness:**

Name: .....

Relationship to child: .....

Phone: Home: .....Work:.....

Mobile: .....

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I understand that the information I provide on this form will be handled in accordance with the Diocesan Privacy Policy and the Privacy Act 1998.

Signature: ..... Parent / Guardian



Attachment D

**EMERGENCY CONTACT INFORMATION**

1. School /Group: .....

2. **Name of Group Leader:** .....

Home ph: .....

Mobile: .....

email: .....

3. Tour departure date: .....

4. **Return information:**

Date:.....Time:.....Location:.....

5. **Group:**

Total number:.....Adults:..... Group Members:.....

6. Do you have an emergency contact list for everyone in the Group? *(If no, obtain one. If yes, attach it to this sheet)*

7. **Emergency Contact Information:**

**a) During school hours**

**Principal**..... Tel:.....

Mobile: .....email: .....

**Other** ..... Tel:.....

Mobile: ..... email:.....

**b) Out of school hours**

**Principal**..... Tel:.....

Mobile: ..... email: .....

**Other** ..... Tel:.....

Mobile: .....email:.....

cont....



**c) Travel company**

Name/address:.....

.....

Tel:.....Fax:.....

Contact name:.....

Tel:.....Fax:.....

Insurance/Emergency Assistant:.....

Hotel:.....

Address:.....

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Hotel Contact (eg Rep/Manager) .....

**d) Other emergency numbers: (eg telephone tree)**

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**Attachment E**

**OVERSEAS AND INTERSTATE EXCURSIONS  
ORGANISATION FLOWCHART**

