

10.00, Tuesday, 12 November 2017

Schools and Lifelong Learning Staff Travelling and Working Overseas Policy

Item number	7.12
Report number	
Executive/routine	
Wards	
Council Commitments	

Executive Summary

The Policy sets out the requirements for Schools and Lifelong Learning staff proposing to travel and work overseas.

This is a new Policy. It sets out the approval process, roles and responsibilities and essential requirements when planning to travel and work overseas.

There is a clear expectation that all travel and work overseas must be justified, represent an appropriate use of resources, and be approved. Simpler alternative methods of achieving the same outcome/s, such as video conferencing, must always be considered first.

Schools and Lifelong Learning Staff Travelling and Working Overseas Policy

1. Recommendations

- 1.1 It is recommended that the proposed Schools and Lifelong Learning Travelling and Working Overseas Policy is approved.

2. Background

- 2.1 Schools and Lifelong Learning Staff may require to travel and work overseas for a range of purposes, including recruitment visits, attendance at conferences, research trips and teaching overseas.
- 2.2 The Sports and Outdoor Learning Unit is responsible for producing and managing the Schools and Lifelong Learning Travelling and Working Overseas Policy.
- 2.3 This is a new Policy and approval process.
- 2.4 Updates to The City of Edinburgh Council's Health and Safety statement set out a clear expectation that protecting the health and safety and welfare of our employees, and our third parties including members of the public, contractors, service users and pupils, is the starting point to delivering a thriving, sustainable capital city.

Accordingly, we will manage health and safety and welfare in a way that:

- takes all reasonable steps to protect the health and safety and welfare of our employees and third parties;
- demonstrates our commitment to continually improve health and safety performance; and
- is compliant with health and safety statutory and regulatory requirements, and all relevant approved codes of practice and guidance.

3. Main report

- 3.1 The proposed Policy content sets out the requirements for Schools and Lifelong Learning Staff travelling and working overseas.
- 3.2 The proposed Policy will apply from 1 January 2018.

3.3 The proposed Policy will enable the Sports and Outdoor Learning Unit to collate details of approved travel and report on the number and range of visits.

3.4 A summary flowchart provides clarity for employees about the approval process (Appendix 11.1).

3.5 Employees are required to complete a checklist to ensure all key tasks are completed prior to submitting a proposal to travel and work overseas (Appendix 11.2).

3.6 Approval Process

The proposed Policy sets out the process which includes approval at 3 key stages; authorised line manager, Head of Schools and Lifelong Learning or delegated person, and the Sports and Outdoor Learning Unit.

3.7 Roles and Responsibilities

These provide clarity about roles and responsibilities for proposed travel and work overseas. Prior to submitting a proposal, there is a clear expectation that the employee making the proposal must do adequate research, consult with relevant departments within The City of Edinburgh Council, liaise with their authorised line manager and seek external advice if required.

3.8 Insurance

This is a key area and employees must ensure they obtain appropriate insurance for the types of activity proposed. This is particularly important for longer periods including teacher exchange visits.

3.9 Risk Assessment

Employees are required to complete a risk assessment and submit this with the proposal. The new risk assessment template must be used and this will assist in identifying and minimising key risks. Employees are required to update any risk assessment prior to departure, on arrival and throughout the visit to minimise risks.

3.10 Other Requirements

The rest of the Policy provides guidance and requirements on key aspects of travelling and working overseas. Links to other policies and procedures support the employee in creating a proposal and to plan in sufficient detail. External links and advice will help to minimise issues prior to departure, on arrival and throughout the visit. Employees are required to report any significant incidents as soon as reasonably practicable.

3.11 The proposed Policy will be launched via email and short presentations at key events.

3.12 The proposed Policy will be reviewed annually or earlier to comply with changing legislation, in response to a significant occurrence and/or significant internal and external guidance.

4. Measures of success

- 4.1 All travel and work overseas by Schools and Lifelong Learning staff is approved and registered via the process set out in the Policy.
- 4.2 All travel and work overseas represents a good use of The City of Edinburgh Council and third party resources.
- 4.3 Issues are minimised due to appropriate planning prior to submitting the proposal to travel and work abroad.
- 4.4 All travel and work overseas is safe and planned to an appropriate level.

5. Financial impact

- 5.1 No direct financial impact.

6. Risk, policy, compliance and governance impact

- 6.1 The potential impact of failure to manage the health and safety of excursions and other requirements such as insurance and application of other policies includes death, injury, ill health, legal liabilities, financial losses and reputational damage.

7. Equalities impact

- 7.1 This Policy provides guidance on equality (Policy Section 4). This will minimise the risk of equalities issues arising from this Policy.

8. Sustainability impact

- 8.1 There are no sustainability issues arising from this Policy.

9. Consultation and engagement

- 9.1 Schools and Lifelong Learning Senior Staff and the Insurance Team have been consulted.
- 9.2 A draft Policy approval flowchart was presented to schools via the Head Teacher Executive Meeting on the 12 October 2017.

10. Background reading/external references

- 10.1 Not applicable.

Alistair Gaw

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11. Appendices

- 11.1 Schools and Lifelong Learning Staff Travelling and Working Overseas Policy.
- 11.2 Proposed Policy Appendix 1 Summary flowchart explaining the approval process.
- 11.3 Proposed Policy Appendix 2 Policy Checklist.
- 11.4 Proposed Policy Appendix 3 Proposal Form.



Staff Travelling and Working Overseas Policy

Schools and Lifelong Learning

Travelling and Working Abroad Policy Guidance and Procedure for all
Schools and Lifelong Learning Staff

Implementation Date: 01 January 2018

Control Schedule

Senior Responsible Officer	Andrew Bradshaw
Authors	Andrew Bagnall and Andrew Bradshaw Sports and Outdoor Learning Unit
Scheduled for Review	August 2018

Version	Date	Authors	Comment
0.1	01 January 2018	Andrew Bagnall and Bradshaw	New policy and approval form WA2017.



Key Information



All Schools and Lifelong Learning staff undertaking business related travel and work overseas **must** receive prior approval and abide by the requirements of this Policy.

Agreement/s with third parties **must not** be entered into prior to approval via the procedure in this Policy. Travel or accommodation arrangements **must not** be booked or paid for prior to approval via the procedure in this policy.

Overseas is defined as any destination out-with the United Kingdom.

This Policy **must be used alongside** the latest Business Travel Guidance:

Key Orb link:
https://orb.edinburgh.gov.uk/downloads/file/25008/business_travel_guidance

This Policy **must also be used alongside** the resources in the appendices (accessed separately via The Orb):

Appendix 1	Summary flowchart explaining the approval process.
Appendix 2	Checklist. A completed checklist must be submitted along with the Proposal Form (Appendix 3). (MUST BE SUBMITTED WITH PROPOSAL FORM)
Appendix 3	Proposal Form: Travel_Work_Overseas_Form_WTO_v1
Appendix 4	CEC Health and Safety Risk Assessment Form link. (MUST BE SUBMITTED WITH PROPOSAL FORM)
Appendix 5	SurveyMonkey link to feedback form for travel and work overseas.

The latest digital version of this Policy and Appendices are available from:

https://orb.edinburgh.gov.uk/info/201189/cf_policies_and_procedures/878/procedures_for_communities_and_families_staff_abroad

Key Contacts

Travelling and Working Overseas Key Contact	andrew.bagnall@edinburgh.gov.uk Tel: 0131 551 4368 / 07718 668 558
Submission of approval forms	staffoverseas@edinburgh.gov.uk
Principal Officer for Outdoor Learning	andrew.bradshaw@edinburgh.gov.uk Tel: 07718 660 549



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1. INTRODUCTION

1.1 All travel and work overseas must be approved via the procedures set out in this Policy and must represent appropriate use of City of Edinburgh Council's resources and resources from third parties. Simpler alternative methods of achieving the same outcome/s, such as video conferencing, must always be considered first.

1.2 The Council is committed to the safety of all employees travelling and working overseas. Visits overseas will only be approved when judged to be safe and foreseeable risks have been minimised.

1.3 Every Schools and Lifelong Learning employee proposing to travel and work overseas must give adequate thought to their own and others' health and safety and the likely conditions and situations that they may encounter. This includes the employee undertaking the appropriate research and planning to ensure safe practice.

1.4 It remains the responsibility of each individual employee to actively participate and co-operate with the Council. Of utmost importance is the requirement that all individual employees travelling and working overseas must act in accordance with the guidance, training and instruction given to them.

2. POLICY AIMS

To provide essential guidance and procedure to Schools and Lifelong Learning employees planning travel or work overseas and their line managers to ensure visits are:

- registered with and approved by the Council;
- in line with the Council's values (Honest and Transparent, Forward Thinking, Customer First, and Work Together);
- contribute to the strategic aims and/or essential functions of the Schools and Lifelong Learning Division and/or individual establishments;
- safe and risks are minimised through good planning and actions;
- appropriately insured; and
- an appropriate use of Council and, if applicable, third party resources.

To ensure a consistent approach to approving travel and work overseas.

2.1 Other Key Council Policies

As the type of overseas visit can vary, the list below is not intended to be complete and it is the responsibility of the employee to ensure they have appropriately researched their proposed overseas travel and work and sought advice when required.

Policy	Link
Conduct and Behaviour Policies and Guidance	https://orb.edinburgh.gov.uk/info/201111/conduct_and_behaviour



Equality and Diversity Policy	https://orb.edinburgh.gov.uk/downloads/file/3746/equality_and_diversity_in_employment_policy
Health and Safety	https://orb.edinburgh.gov.uk/info/201271/health_and_safety
Pay	https://orb.edinburgh.gov.uk/info/200877/pay
Transport	https://orb.edinburgh.gov.uk/info/201195/transport

3. THE CITY OF EDINBURGH HEALTH AND SAFETY POLICY STATEMENT

Key contact:
healthandsafety@edinburgh.gov.uk

Key website link:
https://orb.edinburgh.gov.uk/info/200237/health_and_safety

Protecting the health and safety and welfare of our employees, and our third parties including members of the public, contractors, service users and pupils, is the starting point to delivering a thriving, sustainable capital city.

Accordingly, we will manage health and safety and welfare in a way that:

- takes all reasonable steps to protect the health and safety and welfare of our employees and third parties
- demonstrates our commitment to continually improve health and safety performance
- complies with health and safety statutory and regulatory requirements, and all relevant approved codes of practice and guidance.

4. EQUALITY AND INCLUSION

The Council is committed to all individuals being treated fairly and respectfully, having equal access to opportunities and resources, and contributing fully to the success of the Council and Edinburgh. Users of this Policy are expected to abide by this commitment and follow the requirements in the Council's Equality and Diversity Policy.

It is important that any specific needs are identified very early in the planning process so that reasonable adjustments can be made.



5. SCOPE OF POLICY

This Policy applies to:

- all Council employees within the Schools and Lifelong Learning Section undertaking any type of Council related travel and work overseas, including visits not funded by the Council and 'part-visits' (e.g. part leisure/part Council-related business – this Policy only applies to the latter); and
- any non-Schools and Lifelong Learning employee undertaking work on behalf of the Schools and Lifelong Learning Section.

There are separate policies for staff accompanying young people on excursions.

Key Orb links:
Non-residential units: https://orb.edinburgh.gov.uk/directory_record/229225/excursions_policy_procedures_and_guidance_for_all_non_residential_communities_and_families_establishment_and_staff
Residential units: https://orb.edinburgh.gov.uk/downloads/file/5767/guide_to_planning_excursions

6. DEFINITIONS OF TRAVEL AND WORK OVERSEAS

Any Council business related travel and work carried out by CEC Schools and Lifelong Learning employees in countries other than those of the United Kingdom. Such work-based activities could include recruitment visits, attendance at conferences, research trips and teaching overseas, for example, but not limited to:

- attending and/or participating in approved conferences and other professional development;
- establishing and developing approved relationships with overseas partners;
- representing the Council at approved events overseas;
- approved research projects;
- approved preparatory visits for excursions with young people;
- statutory client/child contact visits; and
- approved teacher exchange programmes.

7. APPROVAL PROCESS

All Schools and Lifelong Learning employees intending to travel or work overseas on Council business **must obtain approval** prior to making any related arrangements or commitments. **Failure to follow the procedures detailed in this Policy may result in the employee being uninsured, render them ineligible to claim expenses and may lead to disciplinary action.**



Appendix 1 provides a summary of the approval process. It is essential that the employee proposing to travel and work overseas undertakes the necessary research and planning prior to submitting the Proposal Form (Appendix 3) for consideration.

The employee and their authorised line manager must have worked through the checklist (Appendix 2) prior to submitting the Proposal Form to the Sports and Outdoor Learning Unit. **There must be one Proposal Form per employee.**

All overseas travel and work must be justified and the employee able to demonstrate that the proposed visit represents the best use of the Council's resources, and if applicable, third party resources. **Overseas travel and work must be proportionate to the anticipated outcomes and cannot be reasonably achieved via alternative arrangements within the UK. This can include activities such as video-conferencing.**

Planning the travel and work must aim to secure the most economic and effective travel and accommodation arrangements.

The rationale for travel and working overseas, and the related costs must be set out in the Proposal Form: **Travel_Work_Overseas_Form_WTO_v1** (Appendix 3).

All foreseeable costs and expected employee claims must be identified and agreed at the planning stage with the employee's line manager and prior to submitting the Proposal Form.

The employee and line manager are responsible for checking and understanding any third-party requirements prior to submitting the Proposal Form. These are often set out as a list of conditions, including roles and responsibilities, and may include waivers and disclaimers. If unsure, the employee and line manager must seek advice from relevant Council departments or external agencies to ensure compliance with the Council's policies, values and requirements.

7.1 What should be sent to the Sports and Outdoor Learning Unit?

With reference to Appendix 1, the following documentation must be sent to the Sports and Outdoor Learning Unit:

Appendix 2	Completed Checklist.
Appendix 3	Completed Proposal Form: Travel_Work_Overseas_Form_WTO_v1
Appendix 4 (link)	Completed CEC Health and Safety Risk Assessment Form.
Other	Any other relevant documentation to support the proposal.

The documentation above must be **sent by an authorised line manager** to:



Key contact:

staffoverseas@edinburgh.gov.uk

Line manager must be the Head Teacher (Schools), Head of Establishment or Senior Manager of the business unit/service.

The employee is responsible for continually monitoring key advice relating to destinations prior to departure. Any significant issues must be reported to the Sports and Outdoor Learning Unit so advice can be given and the visit reassessed if necessary.

8. ROLES AND RESPONSIBILITIES

ROLES AND RESPONSIBILITIES

Employees travelling and working abroad are responsible for:
Abiding by the requirements in this Policy and following the approval procedure, including the completion of the relevant appendices documents prior to submission for approval;
Liaising effectively with their authorised line manager and other Council staff;
Ensuring appropriate insurance has been organised;
Ensuring no agreements have been signed prior to full approval via the procedure in this Policy;
Planning overseas travel and work carefully, using advice and research, and taking all reasonable steps to minimise risks and secure best use of resources (Council and third party);
Undertaking only the approved activities;
Taking care of their own health and safety whilst undertaking visits and not compromising the safety of others;
Undertaking a suitable and sufficient risk assessment prior to each overseas visit, taking account of up to date information;
Notifying the Council via a pre-arranged key contact that they have arrived at each stage of their overseas travel.
Report any significant incident, including completing a SHE report;
Provide feedback relating to concerns or suggested improvements to the Council at an appropriate point either during or after the visit; and
Continuously monitor the destination for any significant issues or potential issues and then report these to the Sports and Outdoor Learning Unit for further advice.

**Line Managers are responsible for:**

Ensuring the employee is adhering to the requirements in this Policy and following the approval procedure, including the completion of the relevant appendices documents prior to submission for approval;

Ensuring the employee has fulfilled their responsibilities detailed above.

Ensuring that employees who undertake travel as part of their work are suitably trained, knowledgeable about their destination and sufficiently experienced to do so.

Ensuring suitable contact arrangements are in place with named contacts so that concerns and issues can be identified and reported;

Taking suitable action to manage incidents which may arise involving Council employees; and

Providing **initial approval** assessed via the requirements of this Policy; Schools and Lifelong Learning Section and establishment needs, priorities and resources; and any third-party guidance and requirements.

The Head of Schools and Lifelong Learning or a delegated person is responsible for:

Approving the travel and work overseas as identified in Appendix 1 (Summary Flowchart) assessed via the requirements of this Policy; Schools and Lifelong Learning Section and establishment needs, priorities and resources; and any third-party guidance and requirements.

Sports and Outdoor Learning Unit Staff are responsible for:

Providing appropriate advice;

Signposting to appropriate advice;

Reviewing this Policy and the approval framework annually or sooner if required;

Ensuring Schools and Lifelong Learning employees are aware of this Policy and can access it;

Providing or organising appropriate training if required;

Registering travel and work overseas; and

Approving the travel and work overseas as identified in Appendix 1 (Summary Flowchart) assessed via the requirements of this Policy; Schools and Lifelong Learning Division and establishment needs, priorities and resources; and any third-party guidance and requirements.

The Employer (The City of Edinburgh Council) is responsible for:

Safeguarding the health and well-being of its employees; and



Putting in place appropriate policy and training to manage overseas work and travel of its employees.

9. INSURANCE

It is essential that the employee understands and arranges adequate and appropriate insurance cover for travelling and working overseas. This must be checked by the line manager. If employees are unsure, they must seek additional advice and guidance:

Questions relating to insurance should be directed via:

insurance@edinburgh.gov.uk

9.1 CEC Employers' and Public Liability Insurance

The Council's insurance arrangements include Employers' and Public Liability insurance. The Public Liability insurance caters for the Council's legal liability for accidental death of or bodily injury or disease to any third party and damage to third party property arising out of its activities (which are intra vires). The insurance policy is subject to normal terms and conditions.

In order to pursue a successful claim against the Council, it is necessary for the third party to demonstrate negligence on the part of the Council or its employees.

This cover is automatic and does not need to be arranged for each visit overseas with the exception of North America Guidance should be sought from Insurance Services no later than 6 weeks prior to travel.



For employees proposing to undertake work overseas under the guidance of a different employer/third party **and still** employed by the City of Edinburgh Council (CEC):

CEC will expect the host employer/third party in the overseas location to cater for the CEC employee via **their** Employers and Public Liability Insurance policies, or equivalent i.e. **NOT CEC's policies**. CEC Insurance Services will expect to see evidence of appropriate insurance cover.

This kind of arrangement is likely for Teacher Exchange Programmes. CEC Employers' and Public Liability Insurance policies will cater for teachers from overseas working in Edinburgh. CEC expect a reciprocal arrangement for the CEC employee overseas. The employee and line manager must take extreme care to check any insurance requirements linked to different third-party programmes. This should be checked and resolved prior to asking for approval via the procedure in this Travelling and Working Overseas Policy.



Any evidence of additional insurance cover must be submitted with the Proposal Form.

9.2 Business Travel Insurance

Business Travel insurance is quite separate from School Journeys Insurance. The former caters for short term trips which individual employees may take from time to time on Council business.

Exclusions of particular note are:

Travel Section B Medical and other Emergency Travel Expenses

- Insured Persons travelling against the advice of a Medical Practitioner;
- Where the purpose of the Trip is to receive medical treatment or advice;
- As a result of the use by an Insured Person of non-prescribed drug or which cannot be legally obtained from a pharmacy; and
- as a result of suicide, attempted suicide or self-inflicted injury.

Any claim that is the result of any *Kidnap* or *Kidnap for Ransom* which occurs in Afghanistan, Colombia, Iraq, Mexico, Nigeria, Pakistan, Philippines, Somalia, Venezuela, Yemen or any other region or country to which the *Insured Person* has travelled where the *United Kingdom* Foreign and Commonwealth Office has advised against “all travel” (or other similar advice for *Insured Persons* not resident in the *United Kingdom*) prior to the commencement of the *Trip*.

Crisis Containment Management Section C

A crisis occurring in Afghanistan, Colombia, Iraq, Mexico, Nigeria, Pakistan, Philippines, Somalia, Venezuela, Yemen or any other region or country to which the *Insured Person* has travelled where the *United Kingdom* Foreign and Commonwealth Office has advised against “all travel” (or other similar advice for *Insured Persons* not resident in the *United Kingdom*) prior to the commencement of the *Trip*.

This list is not exhaustive and the countries mentioned above may change from time to time.

Employees must contact Insurance Services prior to approval to check this policy is suitable.

Employees who receive full approval to travel must then contact Insurance Services as soon as possible and provide details of the travel and an account and cost centre.

Cover will only apply once these details are provided. A summary of cover, features, benefits, limitations and exclusions is available via Appendix 6:



https://orb.edinburgh.gov.uk/info/201189/cf_policies_and_procedures/878/procedures_for_communities_and_families_staff_abroad

10. WORKING HOURS

It is expected that employees will take reasonable rest periods and will not work excessive hours which could be detrimental to their health and safety. Suitable working hours and patterns should be approved by the employee's line manager.

11. EXPENSES AND PAY

Predicted and expected expenses must be identified throughout the planning process and approved by the line manager. Reimbursement of reasonable expenses must comply with the appropriate Council policy and procedure, depending on the type of employee. If the employee and line manager are unsure, they must contact the People Support Centre for additional advice and guidance. It is important that this is resolved and understood by the employee and line manager before approval is sought. If expenses are funded via an external source, these must also be planned and agreed prior to travelling overseas.

For employees undertaking longer visits overseas, for example teacher exchanges, it is essential that the employee and line manager discuss these specific circumstances with the People Support Centre prior to submitting the Proposal Form.

More information:

Useful Orb links:	
General HR link:	https://orb.edinburgh.gov.uk/info/200206/hr_information
Car mileage, travel and allowance claims	CLICK HERE

12. RISK MANAGEMENT

A suitable and sufficient risk assessment(s) **must** be carried out for all overseas travel and work by the individual or lead member of staff. The nature and complexity of the risk assessment will vary with the type of activity being undertaken, and therefore should be proportionate to the level of risk identified.

The risk assessment should consider the following:

- information from the [Foreign and Commonwealth Office](#) (FCO),
- previous knowledge from colleagues familiar with the area/region,
- information from Council's contracted Travel Management Company,
- information from local contacts and partners, including those organising or supporting any activity or events;
- local culture/customs;



- individual factors e.g. health considerations; and
- contacts in the place being visited.

This list is not exhaustive and should act as a guide only, staff should contact the Sports and Outdoor Learning Team for advice.

For further guidance on the general principles of risk assessment, reference can be accessed via the links below.

The approved CEC General Risk Assessment form must be used. This cannot be adapted. The form must be submitted along with the Proposal Form.

Risk Assessment links on the Orb:

Useful Orb links:	
General advice:	https://orb.edinburgh.gov.uk/info/201072/health_and_safety_by_topic/118/risk_assessment
Risk assessment template:	https://orb.edinburgh.gov.uk/downloads/file/25449/risk_assessment_revised

A risk assessment must always be undertaken at the planning stage for working overseas. The employee planning to work overseas must be involved in carrying out the assessment.

Risk assessment documentation must be submitted along with the Proposal Form.

Risk assessments must be reviewed by the employee on arrival at the overseas destination and updated should any additional hazards become apparent. This dynamic risk assessment could include:

- changes in travel arrangements;
- changes in accommodation;
- political situation; and
- environmental conditions.

13. USE OF CEC IT EQUIPMENT AND PHONES OVERSEAS

All employees must comply with the Council's ICT Acceptable Use Policy whilst travelling and working overseas.

Useful Orb links:	
ICT Acceptable Use Policy	https://orb.edinburgh.gov.uk/directory_record/109450/ict_acceptable_use_policy

As a default, CEC mobile phones will not work overseas.

The use of CEC mobile phones overseas must be approved by an authorised line manager. The approved line manager should request information via the ICT Service Team on predicted costs for roaming in specific locations. This will allow the



employee and line manager to predict and agree costs. If the line manager decides to approve the use of a CEC mobile phone abroad, they must email the ICT Service stating the location/s, dates and the mobile number. It is the responsibility of the employee and line manager to gain confirmation that the CEC phone will be able to 'roam' in the specified locations. **No changes should be made until full approval for the visit has been made.**

Useful contact:	
ICT Service	ict.service@edinburgh.gov.uk#
	Tel: 0131 529 7817

It is the responsibility of the employee travelling and working overseas and line manager to undertake this task. It is essential this is resolved prior to travel to reduce the risks of additional charges and misuse of equipment.

The Council will not be held liable for any costs incurred through using private phones and other related equipment. It is recommended that employees contact their network provider relating to using a phone overseas (roaming).

14. TRANSPORTATION AND ACCOMMODATION

Employees are responsible for organising safe and cost-effective transport and accommodation, which are appropriate to their needs. This will reflect local circumstances and must be well researched prior to travelling. Employees can gain advice from travel experts and people working in the local area.

Employees who are travelling as part of a group, which is organised by a third party must still be satisfied that the transport and accommodation arrangements are cost effective, safe and appropriate to their needs.

Normal precautions should be taken including avoiding travelling late at night and unaccompanied travel in remote areas.



Travel or accommodation arrangements **must not** be booked or paid for prior to approval via the procedure in this policy. Employees and line managers must consult and follow the Business Travel Guidance document below.

If employees are not responsible for organising their transport and/or accommodation as this is being organised through a third party, they **must not** enter into any agreement prior to receiving approval via the procedure in this Policy.

14.1 Business Travel – myTravel

For employees who are required to organise **approved** travel and accommodation themselves, they should use the Business myTravel service.

Useful Orb links:



Business Travel Guidance:	https://orb.edinburgh.gov.uk/downloads/download/9670/business_travel_guidance
Business myTravel Service:	https://orb.edinburgh.gov.uk/info/201195/transport/2461/business_mytravel
Registering for this service:	https://orb.edinburgh.gov.uk/info/201195/transport/2461/business_mytravel/2

14.2 Driving Overseas

The need to drive vehicles overseas should be removed or minimised by using public transport and group travel arrangements where applicable.

If employees propose to drive, they must have a clear rationale for doing so and why the same journey(s) cannot be achieved via public transport or shared transport that is assessed to be safe. Driving abroad, eligibility requirements and the associated costs must be approved by the line manager.

Employees must ensure they understand and abide by local laws and requirements. They must be eligible to drive a suitable vehicle at the proposed destination(s). This must be properly researched. The Council recommends that employees should only drive if they have experience of driving overseas in similar locations and vehicles.

Employees intending to drive overseas will reflect different contexts and circumstances. It is therefore important that the employee liaises with different Council departments prior to approval. Key contacts include (i) People Support Centre (linked to expenses overseas) and (ii) Fleet Management for additional guidance and advice linked to driving vehicles overseas and claiming approved expenses:

Useful contacts:	
People Support (cars owned by the employee):	staffcars@edinburgh.gov.uk
Advice on using hired vehicles overseas and the Council's permit scheme:	CEC Fleet Management 0131 337 2307

Employees driving overseas on business related travel and work must be an authorised driver:

Useful Orb links:	
Authorised car user form:	https://orb.edinburgh.gov.uk/download/downloads/id/5368/new_or_updated_privately_owned_vehicle_form
Driver handbook:	https://orb.edinburgh.gov.uk/downloads/file/2191/drivers_handbook
Council Driver Permits:	https://orb.edinburgh.gov.uk/info/201195/transport/438/council_driving_permits



See the [appropriate section](#) regarding information about expenses.

15. HEALTH AND WELLBEING

Line Managers should ensure, as far as reasonably practicable, that employees working overseas take advice on the potential health risks associated with overseas travel and work. The approving line manager must be satisfied that the employee:

- is medically fit for travel;
- complies with any health standards laid down for entry into a specific country or countries; and
- has had any required vaccinations and inoculations and that these are still current.

15.1 Planning the visit

When planning an overseas visit, the health, safety and wellbeing of the employee must be considered of paramount importance. In order to ensure that the visit is as far trouble free and as stress-free as practicably possible, consideration must be given to a number of factors. The Foreign and Commonwealth Office status of the destination must be considered, as well as administrative issues such as the validity of passports, visas and regulations.

15.2 Inoculation and Vaccinations

It is important that the employee makes themselves aware of the advice regarding vaccinations and must ensure they are adequately covered by the relevant up-to-date inoculations and vaccinations required for travel to that destination. Any additional costs will be covered by the Council.

Employees should be aware that some vaccines may take over a month to complete, so appointments with your GP should be made in good time and at least 6 weeks prior to travelling.

15.3 Prescription Medicine

Medications prescribed in the UK are outside the scope of the provisions of this policy. It is the employee's responsibility to ensure that they take adequate supplies if they require any medication which has been prescribed of them in the UK. Drugs taken from home should always be accompanied by a medical certificate that they are certified for personal use and it is the employee's responsibility to ensure such a certificate is obtained and carried with them when they travel.

Be aware that certain countries have specific regulations that may prevent you from taking some medicines into the country.

15.4 European Health Insurance Card

All employees who are nationals of a European country should ensure that they have an up-to-date European Health Insurance Card (EHIC) as this will need to be in the event that they need medical attention at an institution in Europe. If an employee is unable to present an EHIC card, this can adversely affect the health cover under our Council's



insurance policy and could expose a risk to the individual of being personally liable for medical care costs. An EHIC can be obtained online from www.ehic.org.uk

15.5 Musculoskeletal problems

Employees with back problems should be aware of the risks associated with activities such as long-haul flights, travelling on uneven roads and carrying excessive luggage / equipment on overseas visits. If these risks apply, they should be addressed within the Risk Assessment and controls put into place.

15.6 GP Advice

Any employee who is requested to travel overseas on a work-related matter should not do so if their GP has advised against this. Any employee who is concerned about their ability to travel should seek their GP's advice before travelling.

15.7 Illness Acquired while Travelling

Some diseases acquired overseas only become apparent after returning to the UK. It is particularly important employees see their GP to have investigations into any feverish or diarrhoeal illnesses that develop for up to three months after an overseas visit.

15.8 Avoidance of Fatigue

Employees should ensure that they have adequate rest before, during and after their visit. The Council recommends that the necessary rest periods are taken during overseas business travel and these should be appropriate to the nature, destination and duration of the visit.

When considering an itinerary for overseas travel, the following should be regarded as good practice:

- if possible, no appointments should be made on the day of travel where the total duration of travel is more than 6 hours;
- Itineraries should take account of travel time, mode of travel, hardship of travel and allow for meal breaks; and
- where working days are likely to significantly exceed 7.5 hours, consideration should be given to the potential for tiredness and fatigue when arranging the itinerary for the following day.

15.9 Debrief following return to the UK:

It is important that a debrief takes place with the Employee and their Line Manager on return to the UK after an overseas visit. The nature of this may be very brief if the time overseas was short, e.g. attendance at a conference. However, lengthy visits overseas, those to remote or less developed parts of the world or those which proved to be problematic should be discussed at a debrief meeting.

A mechanism should be in place to manage any incidents which are reported during or after an overseas visit. Examples might be threatening behaviour, ill health, poor



standards of accommodation, etc. As a result of the information received at debrief meetings, changes can be made and local intelligence can be shared with colleagues.

The impact on the employee of any negative experiences while overseas can be discussed during the debrief meeting and support can be offered to the employee, if necessary, e.g. Staff Counselling, Occupational Health.

16. LONE WORKING PROCEDURES

As in UK-based work, lone working should be minimised and any remaining incidences assessed for risk. The findings and arrangements can then be recorded in the risk assessment form. Working arrangements are best finalised prior to travel but should be adjusted if required on arrival and during the visit. If an employee is not satisfied with the working arrangements, then they must report these and liaise with appropriate persons to secure reasonable adjustments.

Useful Orb links:	
Lone working policy	https://orb.edinburgh.gov.uk/directory_record/229256/lone_working_procedure

17. TRAVEL MONEY OPTIONS

Employees must plan approved travel money options. If these are funded by the Council, then each method must be agreed by the line manager and the Finance Team.

18. EMERGENCY PROCEDURES

Employees must ensure they are familiar with the relevant emergency procedures linked to their CEC establishment/service in the UK, and those associated with their travel, accommodation and locations overseas. This includes ensuring they are in a safe location, which can be evacuated in an emergency.

Any significant incidents must be reported to the employee's line manager and via CEC's reporting system as soon as reasonably practicable (see next section).

Employees can also use the Council's emergency contact 24/7 to alert the Council of a significant emergency.

Key contact:	
CEC Emergency Contact	(+44) 0131 200 2000

19. INCIDENT REPORTING

Employees working abroad must report any significant incidents, including near misses, as soon as reasonably practicable.

All relevant incidents should be reported to the Council's Health and Safety section. Additional guidance is via the link below. The employee's line manager should be informed.

Useful Orb link:



Reporting an accident:	https://orb.edinburgh.gov.uk/info/200237/health_and_safety/2043/reporting_an_accident
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20. SIGNING AGREEMENTS, WAIVERS and DISCLAIMERS FROM THIRD PARTIES

Employees and line managers must adopt extreme caution to signing these kinds of documents for third parties. Council employees and line managers **must fully understand any document before signing it.**

Council employees and line managers must request any agreements **well before** departure to avoid staff having to sign an agreement on arrival at a venue.

If unsure, further advice must be sought via the Sports and Outdoor Learning Unit. If CEC legal advice is required by the Sports and Outdoor Learning Unit, any chargeable activity by the CEC Legal Team will be allocated to the project expenditure. The Sports and Outdoor Learning Unit **will not** fund this activity. Employees and line managers will be informed prior to agreeing any chargeable activity with the CEC Legal Team.

Any agreements, waivers and disclaimers **must be submitted** with the form: Travel_Work_Overseas_Form_WTO.

Agreements, waivers and disclaimers **must not be signed and returned** to third parties prior to approval of the form.

21. TRAINING

Any training requirements of those participating in overseas travel should be clearly identified by the individual employee or lead member of staff and the necessary training, instruction and information provided. Appropriate records should be maintained.

22. EXTERNAL ADVICE

The following resources may provide additional guidance and advice. It is important that the employee evaluates third party advice carefully so that it does not conflict with Council policy, guidance and advice. If an employee is unsure, they should seek additional advice from the relevant Council department.

The employee is responsible for continually monitoring key advice relating to destinations prior to departure. Any significant issues must be reported to the Sports and Outdoor Learning Unit so advice can be given and the visit reassessed if necessary.

Key external links:	
Fit for Travel (NHS)	http://www.fitfortravel.nhs.uk/home.aspx
Foreign travel Advice (gov.uk)	https://www.gov.uk/foreign-travel-advice
Foreign travel checklist (gov.uk)	https://www.gov.uk/guidance/foreign-travel-checklist



Healthcare abroad (NHS)	https://www.nhs.uk/nhsengland/Healthcareabroad/pages/Healthcareabroad.aspx
Living abroad	https://www.gov.uk/browse/abroad/living-abroad
Money advice (The Money Advice Service)	https://www.moneyadviceservice.org.uk/en/articles/travel-money-options-cash-cards-and-travellers-cheques
Passports (gov.uk)	https://www.gov.uk/browse/abroad/passports
Terrorism 1 – reducing risk (gov.uk)	https://www.gov.uk/guidance/reduce-your-risk-from-terrorism-while-abroad
Terrorism 2 – Secret Service MI5	https://www.mi5.gov.uk/travel-advice
Travel aware campaign (gov.uk)	https://travelaware.campaign.gov.uk/
Travel abroad (gov.uk)	https://www.gov.uk/browse/abroad/travel-abroad
Vaccinations 1 (NHS)	https://www.nhs.uk/chq/Pages/1072.aspx?CategoryID=67
Vaccination 2 (NHS)	https://www.nhs.uk/conditions/travel-vaccinations/jabs/

23. MONITORING AND REVIEW

Effective management of Council employees working overseas requires review and feedback. It is important to learn from experiences, and a post visit debriefing should follow each visit overseas, this should include reference to safety issues including accidents, incidents and near misses identified during the visit.

Post overseas visit feedback should be communicated to the Sports and Outdoor Learning Unit via the link to the feedback survey (Appendix 5)

See the Orb for APPENDICES 1 to 5

APPENDIX 6 - TRAVEL TIPS

TRAVEL TIPS

To help minimise risks and issues see below some examples of simple precautions that can be taken whilst travelling;

Before you go:

- Check the FCO website the day before your visit to ensure your destination is safe to travel to.
- Make sure you have a signed, valid passport with the emergency information page completed, and an appropriate work/business visa if required.
- Leave copies of your itinerary, passport data page and visas with your Line Manager and family or friends, so you can be contacted in case of an emergency.
- Research the country of your destination; take advice from those who are more experienced in the country.
- Where applicable consider the cultural customs so as not to unnecessarily offend.
- Familiarise yourself with local conditions and laws: whilst in a foreign country you are subject to its laws.



- Ensure you have emergency contact details, some cash and credit cards (stored separately in case of theft).

While you are away:

Personal Safety; Take precautions to avoid being a target of crime:

- Do not wear conspicuous clothing or jewellery and do not carry excessive amounts of money.
- Do not carry large amounts of money or valuables.

Hotels; In accommodation provided:

- Keep your passport and travel documents on your person – do not leave them in the room.
- Always put valuables in the hotel room safe. If your room does not have a safe, ask at reception to see if they provide a safe facility.
- Avoid putting the 'please make up my room' sign on the door when you go out – this is a tell-tale sign that your room is vacant.
- Familiarise yourself with emergency provisions within your accommodation, locate your nearest exit and fire extinguisher.

Taxis; Where possible travel by taxi as opposed to walking the streets with a map and/or luggage:

- Ask your hotel to call a taxi for you.
- Have the address of your destination or hotel written in the local language.
- When calling a taxi, ask what colour the car will be and wait indoors for it to arrive.
- Compare the face of the taxi driver to the photo license.

Driving; If not using our contracted Travel Management Company (TMC), where possible select reputable companies from which to hire drivers and vehicles:

- Only drive if essential and ensure you hold a full valid international driving licence.
- If possible avoid driving at night and or travel by moped or motorcycle, check for seatbelts and be aware of risks.

Skin Protection;

- If possible avoid midday sun.
- Use a sunscreen and cover skin where possible with appropriate clothing.

Insect and Animal Bites; A variety of tropical diseases are carried by insects and other invertebrates, especially Mosquitoes and Ticks. Check which types of risks are specific to your visit.

To avoid insect bites;

- Use insect repellents.
- Cover exposed skin with loose, long clothing.
- Use nets, knock down sprays in rooms.
- If bitten, thoroughly cleanse the area and seek medical advice as soon as possible.

If Rabies is a risk, post exposure (bite) vaccination is required as soon as possible

Food and Water; Strict food and water hygiene methods should be adhered to always as food and water can expose travellers to a range of bacteria, viruses, parasites and other causes of illness.

- Always wash hands with soap and water before eating and after using the bathroom when travelling.



- Do not eat undercooked meat when travelling unless the source is trustworthy
- Only drink bottled water.
- If bottled water is unavailable boil or sterilise water.
- Carry water treatment drops if it is not possible to boil water while travelling.
- Avoid ice in drinks.

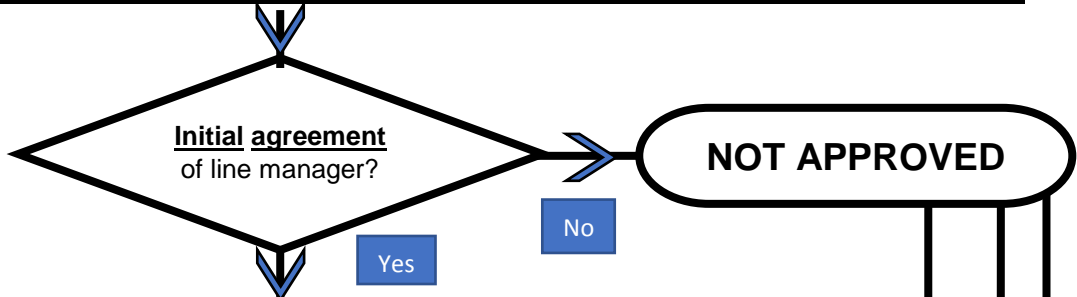
Dealing with an emergency:

- Remember to take the Council's INSURANCE EMERGENCY CONTACT INFORMATION, wherever you go
- Employees already overseas when a local situation arises/changes should contact the Council TMC on the emergency number given
- Keep the Council informed through your Line Manager about any difficult situations you may be experiencing

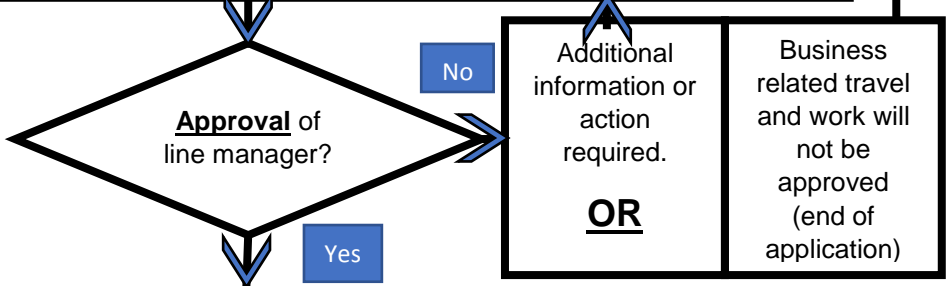
Information Sources:

The Foreign and Commonwealth Office and the Travel Management Company dealing with the booking will be able to provide information on the necessary vaccinations, local politics, areas to avoid etc. Travel agents are obliged to provide this information. The Foreign and Commonwealth Office carries up to date travel advice for over 200 countries. It should be used as the basis for informing all those travelling on Council business of the risks that they may face.

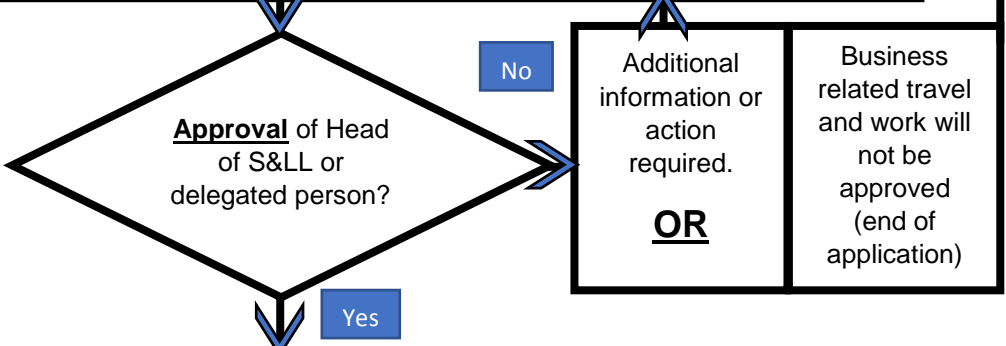
**Any CEC business-related overseas travel and work.
Initial discussion with line manager.**



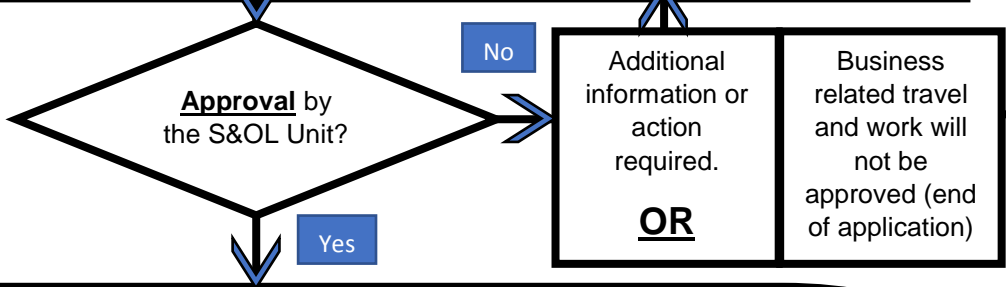
Applicant and designated line manager examine the opportunity in more detail. Use the S&LL Staff Overseas Policy, checklist and undertake research to complete the S&LL Staff Overseas Proposal Form. Line manager must be the **Head Teacher (Schools), Head of Establishment or Senior Manager** of the business unit/service.



Send the form and any relevant supporting documentation (see Section 6 of Policy) **from the line manager** to the Sports and Outdoor Learning Unit (S&OL Unit) as soon as reasonably practicable and normally before 3 months of departure: staffoverseas@edinburgh.gov.uk. This proposal will be registered and sent to the Head of Schools and Lifelong Learning or a delegated person for evaluation.



The S&OL Unit will evaluate the proposal using the requirements set out in the S&LL Staff Overseas Policy and any other relevant guidance and/or policy.



CEC overseas business-related travel and work **approved** subject to any conditional comments from the S&OL Unit and any post-approval emerging issues. The form will be returned to the applicant **and** line manager. It is the responsibility of the member of staff travelling and working overseas to monitor any emerging issues and report these to their line manager and the S&OL Unit as soon as reasonably practicable.

Appendix 2 Schools and Lifelong Learning Staff Overseas Checklist

Dec 2017 vers.

This checklist must be used alongside the latest version of the Schools and Lifelong Learning Staff Travelling and Working Overseas Policy. The items below are designed to support the employee in completing a proposal travelling and working overseas. A response is required for each question and will assist others in assessing this proposal.

Name of employee:	
Staff number:	
Proposed overseas location/s:	
Proposed dates:	
Name of line manager providing approval:	

Click on the appropriate square to insert a cross in the chosen column i.e.

	Questions for the employee proposing to travel and work overseas				Notes (explain 'partly' responses and provide more detail if necessary)
1	Do you consider the proposed travel and work overseas to be compliant with the Schools and Lifelong Learning Staff Travelling and Working Overseas Policy?	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
2	Do you understand and agree to your responsibilities detailed in the Schools and Lifelong Learning Staff Travelling and Working Overseas Policy?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Partly <input type="checkbox"/>	
3	Have you checked that the proposed visit does not conflict with the current Foreign and Commonwealth Office advice?	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
4	Have you completed the Proposal Form (Appendix 3)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
5	Have you completed a risk assessment using the CEC approved template? LINK	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
6	You must not sign any third-party agreements/waivers/disclaimers prior to full approval. You confirm you fully understand the content of any of these documents and have consulted relevant Council staff where necessary. You are satisfied that these do not affect compliance with the Schools and Lifelong Learning Staff Travelling and Working Overseas Policy nor any other CEC policy or procedure.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A	
7	Are you satisfied that there will be appropriate insurance cover in place for this travel and work overseas? Any additional insurance needs have been researched (not finalised/purchased prior to full approval).	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
8	Have you sought appropriate advice and resolved any additional priorities including but not limited to payment of expenses, use of phones, access to IT, and driving overseas?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Partly <input type="checkbox"/>	
9	Do you have approval from the appropriate and authorised line manager?	Yes <input type="checkbox"/>	No <input type="checkbox"/>		

10	Do you have any concerns about the proposed travel and work overseas or are there any outstanding issues?	Yes <input type="checkbox"/>	No <input type="checkbox"/>		If yes, include more information here:
11	If successful in your proposal, do you acknowledge that you must report any emerging issues to the Sports and Outdoor Unit prior to departure or during the visit?	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
12	<p>If you have responded 'No' to any of the questions above, you must not submit your proposal and gain additional advice and support.</p> <p>If you are ready to submit your proposal, please check you will include/complete the following:</p>				
<p>The Proposal Form (Appendix 3), this checklist (Appendix 2), risk assessment and any supporting documentation will be sent from the authorised line manager's email account to staffoverseas@edinburgh.gov.uk</p>				<p>Yes <input type="checkbox"/></p>	

Appendix 3 Proposal_Form_Travel_Working_Overseas

Name Post Title

Team / Establishment Telephone No

SECTION A – DETAILS OF PROPOSED OVERSEAS TRAVEL

Destination(s)

Date of Departure 00/00/2000 Approx Time of Travel

Date of Return 00/00/2000 Approx Time of Travel

Purpose/Objectives of Visit

Expected benefits

Estimated cost of visit:

Detail (please provide a breakdown of costs e.g. *Accommodation/Flights/Fees/ Meals/Local Travel/Visa/Other Project Costs*):

What is the source of funding for this trip?

If any costs are funded by other sources or recoverable give details below

'I declare that the information given here and on the attached checklist is correct and accurate to the best of my knowledge'

Employee's Signature _____

Date ___/___/___

SECTION B – AUTHORISATION (Line Manager)

Line Manager's Signature _____

Date ___/___/___

This form, together with Risk Assessment, completed checklist and any supporting documentation, should be sent by the Line Manager to staffoverseas@edinburgh.gov.uk

SECTION C – AUTHORISATION (Head of Schools & Lifelong Learning / delegated person)

Travel Request **AUTHORISED / REFUSED (delete as appropriate)**

Signature _____

Date ___/___/___

SECTION D – AUTHORISATION & REGISTRATION (Sports & Outdoor Learning Unit)

OUTDOOR LEARNING USE ONLY

Approval Form Complete YES / NO

Completed Checklist included YES / NO

Satisfactory Risk Assessment included YES / NO

Visit Approved YES / NO

Comments: _____

Checked by: _____

Date: _____

Return completed form to Employee & Line Manager