



**KWAZULU-NATAL DEPARTMENT OF EDUCATION**

**POLICY ON LEARNER TRANSPORT FOR PUBLIC SCHOOLS**

**Effective Date:- 01 MARCH 2013**

**Review Date:-**

**Approval**

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**Nkosinathi SP Sishi, PhD**

**Head of Department: Education**

A handwritten date '01/02/2013' written in black ink over a dotted line.

**Date**

## **1. Introduction**

Transportation of learners to their respective schools has always been a key challenge confronting government in South Africa. The department has through various studies, such as the National Household Travel Survey of 2005, and the interactions with affected stakeholders, noted that most learners have difficulty in accessing schools in both urban and rural settings. The development of this Learner Transport Policy is one of the Department of Education's, in collaboration with the Department of Transport, interventions towards addressing challenges of accessibility and mobility. The challenges that are faced by learners and affected stakeholders on a daily basis, include, amongst others, walking long distances to school, the high cost of transport, lack of business opportunities for small micro and medium enterprises, late payment of services, high accident rates and safety of learners.

This learner transport policy heralds new era in the governance of learner transport in the country. The policy caters for contracted and non-contracted service providers within the broader spectrum of learner transportation. The development of this Provincial Learner Transport Policy falls within the context of National Transport Policy and Regulations for Safety Measures on Public and Independent Schools. The policy seeks to support on-going efforts by Government to address the socio and economic development of the country and regulate the movement of learners in any school activity. This policy seeks to recognize the need to bring a uniform safe approach to the transportation of learners and the fulfillment of the constitutional mandate of the Department of Transport to provide a safe and efficient transport system.

The development of this learner transport policy would not have been realized without the maximum participation of various stakeholders and partners in both governmental and non-governmental sectors through various platforms during the formulation process.

This policy will ensure that even learners in disadvantaged communities and deep in rural areas of KwaZulu Natal, have access to schools and safely participate in all school activities and ultimately become part of the active economy.

## **2. Background**

KwaZulu Natal endeavours to develop an integrated approach in the transportation system of learners. The need for a uniform implementation approach with regard to learner transportation has influenced the need to develop a learner transport policy that addresses the challenges which learners experience on a daily basis. These challenges are compounded by numerous factors ranging from the use of improper transport (un-proclaimed light delivery vehicles (LDVs), bad road conditions, un-roadworthy vehicles and over-loading and road traffic accidents.

The KZN Department of Education has been providing learners who do not have access to the nearest school within their communities with transport and also allowing SMME's to provide this service. The purpose of this policy is to ensure that learners are able to reach their schools in a healthy, safe and secure mode of transport.

### 3. Definitions

**Accessible Transport:** means a type of transport that can easily be used by a person who has some form of physical and/ or mental disability or temporary movement disabilities thereby requiring transport facilities that are equipped to cater for their special needs.

**Billeting** means that learners are being accommodated overnight in the homes of volunteer host families during an excursion.

**Bus** means a motor vehicle designed, or adapted for the conveyance of more than 16 persons (including the driver, if any) as defined by the National Road traffic Act 1996 (Act 93 of 1996).

**Contracted services** is a subsidized , dedicated learner transport aimed at the needy learners who travel more than three kilometers from home to the nearest grade appropriate school.

**Declaration** means a declaration signed by a parent, who is not an employee of the Department of Education but wishes to participate in an excursion including host families in billet cases. This should indicate whether or not any convictions, circumstances or reasons exist which might preclude him/her from working with or near children.

**Educator-in charge** means the member of the state employed teaching staff who is authorized by the principal in writing to be in charge during an excursion.

**Excursions, tours and outings** mean any school activity conducted off the site of the school at which the learner is enrolled.

**Excursions management committee** means educators, parents and members of the Representatives Councils of Learners (in schools with grade 8 or higher) responsible for managing excursions.

**Improper Transport:** Is the non-subsidized transport mode that is locally organized by a group of people or parents to transport learners to and from school in un-proclaimed light delivery vehicles.

**International excursions** mean an excursion that involves travel to countries outside the Republic of South Africa.

**Inter-provincial excursion** means an excursion that involves travel to another province in the Republic of South Africa.

**Inter-district excursion** means an excursion that involves travel to another education district within the province

**Land transport** means the movement of persons and goods on or across land by means of any conveyance and through the use of any infrastructure and facilities in connection therewith;

**LDV's** Light delivery vehicle adapted for the conveyance of persons in compliance with the national road traffic act, 1996 and only if it meets the requirements set down by the MEC in terms of the National Land Transport transition Amendment Act no. 26 of 2006.

**Learner:** any person receiving education or obliged to receive education in terms of SASA

**Learner Transport:** Any transport services provided to learners from Grade R to Grade 12 in order to access education.

**Local authority** a transitional metropolitan substructure, transitional local council or local government body contemplated in section 1 (1) of the Local Government Transition Act, 1993 (Act 209 of 1993);

**Midibus** means a sub-category of a bus, designed or modified solely or principally for the conveyance of more than 16 and not more than 35 persons (including the driver) as defined by the National Road traffic Act 1996 (Act 93 of 1996)

**Minibus** means a motor vehicle designed or adapted solely or principally for the conveyance of more than nine, but not more than 16 persons, including the driver; as defined by the National Road traffic Act 1996 (Act 93 of 1996)

**Mode of transport** refers to different types of transport – e.g. road or rail; maritime or aviation;

**Motor vehicle** means any self-propelled vehicle and includes- a trailer; and a vehicle having pedals and an engine or an electric motor as an integral part thereof or attached thereto and which is designed or adapted to be propelled by means of such pedals, engine or motor or both such pedals and engine, but does not include – any vehicle propelled by electrical power derived from storage batteries and which is controlled by a pedestrian; or any vehicle with a mass not exceeding 230 kilograms and specially designed and constructed, and not merely adapted, for the use of any person suffering from some physical defect or disability and used solely by such person; as defined by the National Road traffic Act 1996 (Act 93 of 1996)

**Non-contracted service** means a public transport service other than one operated in terms of a commercial service contract, subsidized service contract or negotiated contract, current tendered contract, interim contract or concession agreement;

**Non-motorised transport”** means all forms of transport that do not rely on an engine or a motor for mobility

**Pedal cycle** means any bicycle or tricycle designed for propulsion solely by means of human power as defined by the National Road traffic Act (Act 93 of 1996)

**Persons with disabilities** means all persons whose mobility is restricted by temporary or permanent physical or mental disability, and includes the very young, the blind or partially-sighted and the deaf or hard of hearing;

**Public transport** means the conveyance of people or freight for reward by any travel mode whether car, metered taxi, minibus-taxi, bus, tram and light and heavy rail.

**Public transport vehicle** means a motor vehicle conveying persons for reward and operating in terms of an operating license issued in accordance with the provision of NLTTA as defined by the National Road traffic Act (Act 93 of 1996)

**Regulatory entity** means the National Public Transport Regulator, a Provincial Regulatory Entity, or a municipality to which the operating license function has been assigned;

**School** means a public school in terms of SASA

**School Activity:** any official educational, cultural, recreational or social activity of the school within or outside the school premises.

**School site** means the public school premises at which a learner is enrolled.

**School bus** means a mini-bus or bus, owned by or contracted to, or on behalf of, a school, and used principally for the conveyance of learners and other persons associated with such school.

**Supervisory team** means all parents and educators who are responsible for the management and control of learners during the excursion.

**Universal access** “means the provision of a better transportation for all (i.e. baled passengers as well as life cycle passengers and those with disabilities);

**Venue** means the buildings, grounds and facilities where planned activities occur during an excursion.

**Walking** a form of non-motorised transportation without a vehicle or animal that begins and ends the journey on foot.

#### **4. Legislative and Policy Mandate**

4.1 The Constitution of the Republic of South Africa (Act 108 of 1996) provides in the Bill of Rights that everyone has a right to a basic education, which the state, through reasonable measures, must make progressively available and accessible.

4.2 The National Education Policy act (Act 27 of 1996) is directed to the advancement and protection of the fundamental right of a person to a basic education and equal access to education institutions.

4.3 National Land Transport transition Amendment Act no. 26 of 2006

4.4 The South African Schools Act (Act 84 of 1996) provides in Section 3 (3) that the Member of the Executive Council (MEC) of a province must ensure there are enough school places so that every child (of compulsory school attendance age) in his or her province can attend school.

Section 3 (4) provides the MEC must take steps to remedy the lack of school places if there are not enough in the province.

Section 5 provides that all learners have a right of access to quality education without unfair discrimination.

4.5 The Departmental Annual Performance Plan 2012/13

## **5. Rationale of Learner Transport**

- a) To provide equitable access to quality education for the people of KwaZulu-Natal
- b) To improve access to quality education by providing safe, decent, effective, and integrated sustainable learner transport.
- c) To define a holistic approach in managing learner transport services and to provide a regulatory framework through which learner transport would be best implemented and to attain uniformity.
- d) To provide a coherent solution on a collaborative implementation of a learner transport strategy.
- e) The Department of Educations' priorities of providing access into quality education and safe communities find resonance in this policy. It is paramount for the regulatory framework to guide on the safety norms, standards and regulations for learner transport operations. The objective of the policy is also that learners, schools, parents, communities, planners and law enforcement authorities are to be governed by a uniform set of regulations.

## **6. Strategic Objectives**

- a) To guide the implementation of a shared vision to improve access to quality education through a coordinated and aligned transport system;
- b) To manage and oversee the implementation of an integrated learner transport service.
- c) To ensure an effective management of learner transport system.
- d) To provide for a safe and secure transport environment for learners through co-operation and collaboration with law enforcement authorities.
- e) To strengthen partnerships with other stakeholders in Government and Non-Government sectors.
- f) To provide universal access to learner transport.

## **7. Desired Outputs**

The following are the desired outputs to be realised from the implementation of this policy.

- a) Rate of road accidents and learner fatalities reduced;
- b) A coordinated approach in relation to planning and implementation
- c) Learner transport operations that adhere to road traffic regulations
- d) Vehicle maintenance plan and technical support for emergencies service standards meeting requirements of the services guideline
- e) Viable and sustainable operations
- f) A coherent performance management and monitoring system

## **8. Mode of Coordination / Terms of reference – Inter sectorial approach**

A task team comprising of representatives from the Department of Education and the Department of Transport is formed to develop pillars to guide on a safe transport system for learners.

This task team was to be guided by the following terms of reference:

- i. develop an integrated learner transport policy,
- ii. strategy on field excursions,
- iii. implementation strategy and
- iv. monitoring mechanism.

## **9. Modes of transport**

### **9.1 Current**

- a) The Department of Education, in conjunction with The Department of Transport has a subsidized learner transport bus system for learners that walk more than 3 km.

The Department of Education has the following responsibilities within that system:

- i. To identify beneficiaries and develop preliminary routes
  - ii. To develop learner transport plans.
  - iii. Fund transportation of dedicated learners
  - iv. Monitor transportation of learners on daily basis
  - v. Report progress to the Provincial Department of Education on a regular basis.
- b) Improper Transport is the non-subsidized transport mode that is locally organized by a group of people or parents to transport learners to and from school in un-proclaimed vehicles. This includes the following: Trucks, midi-buses, LDV's, pedal cycles, animal drawn carts ETC.
- c) Learners are subsidised through government concessions when public transport is being utilised, this includes trains, minibus-taxi's and busses.

## **9.2 Challenges identified**

Road carnages  
 Inaccessible roads  
 Shortage of learner transport  
 Demand exceeding supply (overloading, speed, reckless driving)  
 Financial constraints  
 Unauthorized excursions  
 Safety and welfare of learners  
 Non-adherence and ineffective implementation of existing policies and guidelines  
 Use of un-proclaimed modes of transport.  
 Use of un-roadworthy modes of transport.  
 Long distances walked by learners in rural areas (poverty levels)

## **10. Scope of implementation**

- a. This strategy will be implemented in all twelve districts in the Provincial Department of Education, KZN.
- b. This policy will cover all modes of transport currently being utilized to ferry learners to and from school and also curriculum related excursions and tours. (Refer to paragraph 9.)
- c. This policy is also applicable to long term, short term and immediate contracts that are concluded between the providers of the service and schools.
- d. This policy will also regulate field excursions in terms of SASA.
- e. This policy will also map out the monitoring processes of modes of transport in terms of applicable Department of Transport policies, Draft National Learner Transport Policy 2012 and any applicable transport standard.

## **11. Targeted clients / school activity**

- a. Learners and parents/guardians
- b. Schools in all twelve districts
- c. Educators

- d. Transport associations and structures
- e. Government Departments and Municipalities
- f. Contracted service providers
- g. Partners

## 12. Dedicated Subsidized Learner Transport

### 12.1 Roles and Responsibilities

The department of education has been providing dedicated learner transport. The service has been provided within the low level of funding and has been very limited. No Learner transport services are part of the planning process.

The draft scholar transport policy articulates the roles and responsibilities of all stakeholders involved in the provision of learner transport. It is acknowledged that while the provision of learner transport is the ultimate responsibility of department of transport, collaboration and close co-operation with the department of education is essential in order to ensure proper provision of learner transport.

#### Roles and Responsibilities DOE And DOT

DoE	DoT
1. Identification of need	1. Provision of dedicated learner transport as well as emergency learner transport services to learners in rural areas and in under- serviced areas.
2. Conduct dedicated subsidized learner transport and emergency learner transport verification visits to schools and Districts	Payment for the services rendered for dedicated learner transport
3. Provision of learner transport to Learners with Special Education Needs (LSEN) schools and its budget.	Develop operational standards and criteria for the transportation of learners with special needs.

The policy recommends that learner transport plans must be developed and integrated into the provincial land transport as well as integrated transport plans.

### 12.2 Criteria for Learner On Dedicated Transport

As mentioned, the identification of beneficiaries for dedicated wholly subsidized transport is the responsibility of both the department of Education and the Department of Transport. The following criteria is recommended by draft policy:

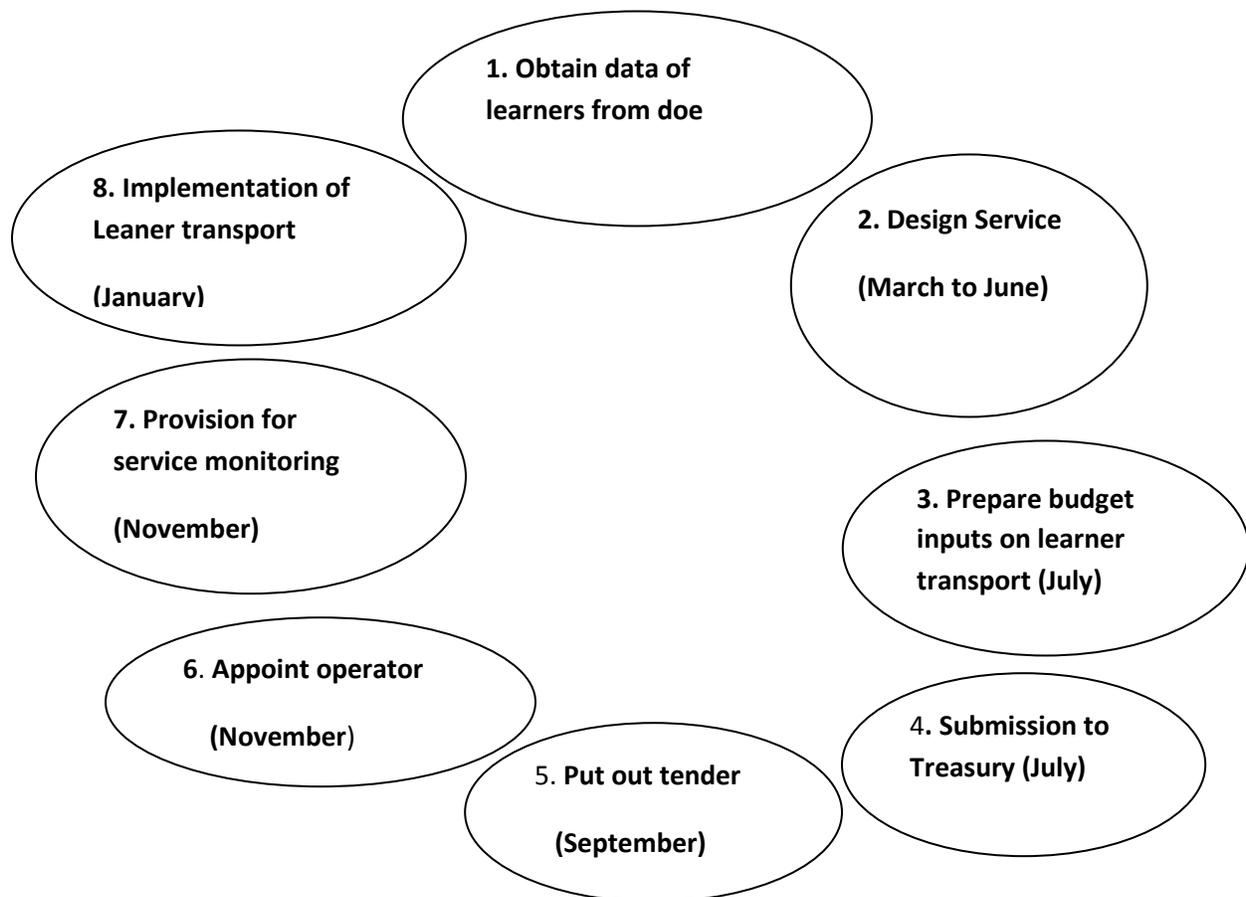
1. Beneficiaries must be learners from Grade R to Grade 12
2. The distance traveled must be more than 3km between home and school
3. Learner transport must be to the nearest appropriate grade school
4. Parent choice must not be dedicated subsidized transport. Parental choice refers to when the parent prefers to enroll their children at school other than the nearest suitable school. Such cases are catered in the main stream public transport.

### 12.3 Type of Subsidy Scheme For Learner Transport.

Generally, learners within subsidized mainstream public transport pay concessionary fares. There is no policy, alas, which could serve as a guideline to determine circumstances and the basis for wholly subsidized dedicated learner transport. It is assumed that is up the province to make a determination on this matter. Subsidized dedicated learner transport is aimed at needy learners to whom attending school depend on the availability of safe and secure transport. These learner are from poor families, mostly dependant on social grants, who hardly afford a day's meal. Payment of transport would pose an additional burden which could not be met. It is therefore on these broader reasons that the subsidized dedicated learner will be provided on hundred percent subsidies.

#### Learner Transport Planning Framework

Figure1



**Figure 1** above is the illustration of the planning cycle which needs to be followed before the implementation of learner transport in the new financial year. The department of transport will obtain information, from the department of education, such as database of learner transport beneficiaries, schools and areas where schools are located. When all the information is obtained, the department of Transport will design and cost the services as per information received. Budget will be prepared and submitted to Treasury in July. This will be followed by

putting out tenders and appointment of operators in November. Provision of learner transport will begin in January.

#### **12.4 The Provisioning Of Learner Transport Processes (Identification Of Learners)**

1. Learner Transport Section sets the annual target on learners to be transported in KZN. The annual target is divided into twelve (12) Districts with the ten rural Districts allocated high equal quotas and the two (2) less rural Districts allocated the least equal quotas. Each District ensures that it adheres to its quota.
2. Schools identify need for learner transportation and submit requests to District. A school fills in the request form entitled "REQUEST FOR LEARNER TRANSPORT" Particulars will be provided per learner as follows: surname and name, gender, age, grade, mode of transport used, pick up point, return kilometers and cost.
3. A District groups schools into a cluster requesting transportation in terms of;
4. Area that learners travel to and from i.e. starting point to end point. Learners who travel a return distance of six (6) kilometers to and from school are eligible for learner transport. However, due to financial constrains preference is given to learners that travel the longest distance to the nearest grade appropriate school.
5. The number of learners in a cluster has a bearing on the mode of transport to be preferred, depending on the rate charged and the mode of transport available in the area.
6. Kilometers traveled by transport will be calculated from the first pick up point to the furthest drop off point. The kilometers by the learner will be calculated from the learner's pick up point to his or her drop off point.
7. A District adheres to its learner transport quota and gives preference to learners that travel the longest distance to get to the nearest grade appropriate school.
8. A District and schools that are scheduled to benefit from learner transport provision get involved in drawing of the tentative routes and pick up points.
9. Learners from quintile 1-3 who travel long distances to the nearest grade appropriate school must be given first priority when requesting for learner transport provision. Learners from quintile 4 & 5 schools will also benefit from provision of transport provided they travel a long distance to get to the nearest school.
10. Schools submit the verified forms for learner transport requests to the District.
11. Districts receive and verify data for learner transport provision from schools.
12. Districts submit verified data to Learner Transport Section.
13. Learner Transport Section verifies cleans and analyzes data and then submits it to the Department of Transport.

**NB: This is the area that currently is suffering huge backlogs due to omissions on important information needed to provide effective and efficient learner transportation.**

14. The Department of Transport (DOT) conducts service planning and route design.
15. DoT ensures that the set target will be met by the budget allocated
16. DOT invites tenders from the interested service providers.
17. DOT appoints the relevant service providers.

## **13. School Activities and Excursions Policy**

### **13.1 Purpose of the policy**

The purpose of the policy is

- (a) to provide public schools with procedures for organizing school excursions
- (b) to promote safe and properly organized school excursions where learners experience quality learning beyond the school environment

### **13.2 Scope and application of policy**

- (a) the policy applies to all public schools in the province of KwaZulu –Natal
- (b) the policy applies to excursions organized by schools, Departmental officials, other state departments, non governmental organizations, groups and individuals

### **13.3 Interpretation of terms**

Terms referred to in this policy must be understood in line with the definitions as well as the legislative framework indicated below

### **13.4 Planning Stage**

#### **13.4.1 Duties of the Principal**

- a) The principal must establish an excursion management committee to manage all school excursions; and
- b) Facilitate the development of a year plan reflecting all excursions to be undertaken during each school calendar year indicating the following-:
  - i) Places to be visited including dates and number of days;
  - ii) Curriculum linkages with site(s) to be visited;

- iii) Number of learners to participate;
  - iv) Number of adults to supervise learners (at least one educator, parent or adult for every 20 learners in primary schools and one educator, parent or adult for every 30 learners in secondary schools : Regulation 8A(2) (d).
  - v) Estimated costs to parents;
  - vi) Mode of transportation ;
  - vii) Accommodation and catering arrangements
- c) The principal must ascertain that the school has insured learners against accidents, injuries, general medical expenses, hospitalization and theft that may occur depending on the availability of funds (Regulations 8A (2) (a) )
- d) The plan should be presented to the SGB for approval;
- e) the approved plan with a schedule of dates must be submitted to the Department by the principal;
- f) Adults who accompany learners and who are not members of staff, must complete the confidentiality declaration form (Appendix C)

#### **13.4.2 Steps to be followed before undertaking an excursion.**

##### **Securing relevant approval from the Department of Education**

The principal must complete an application form (Appendix A) to secure approval before any excursion and must follow the official line function within the specified timeframes:

- a) To undertake a school excursion within the district approval must be secured from the Ward Manager 14 days before the excursion
- b) To undertake a school excursion to another district approval must be secured from the District Manager 14 days before the excursion
- c) To undertake an inter-provincial excursion approval must be secured from the Head of Department 30 days before the excursion
- d) To undertake an international excursion approval must be secured from the

Member of the Executive Council responsible for Education in the Province 90 days before the excursion

13.4.3 The excursion itinerary must be attached to the application form indicating where learners will be accommodated, transportation and catering arrangements. Contact details of the hosts and of the supervising educators must be reflected. Health Insurance Certificate must be obtained from the catering establishment.

### **13.5 Details of the excursion**

a) Approval must be sought from the relevant Municipality where the school will be visiting particular sites to ensure proper planning by the affected municipality e.g. eThekweni municipality, for the provision of risk management systems.

b) Parents or guardians of learners must be given clear and comprehensive details of the excursion at least 21 days before the excursion including:

- i) The purpose of the excursion;
- ii) Date, time of departure and time of arrival;
- iii) Activities to be undertaken during the excursion;
- iv) Duration of the excursion;
- v) Location of excursion including alternative venues;
- vi) Supervisors' contact details during the excursion;
- vii) Excursion costs to parents;
- viii) Responsibility of the parent or guardian regarding medical costs incurred in case of accident or illness during the excursion; and
- ix) Special clothing or other items required.

### **13.6 Documents to be acquired**

The Principal and the Excursion Management Committee must ensure that the following documents are provided before and during the excursion

- a) Written departmental approval before the excursion for undertaking a school trip
- b) Written consent for the participation of their children must be obtained from parents/guardians before the excursion in the Consent form (See appendix D)
- c) Parents/guardians must provide information about their children's health or fitness prior to the commencement of an excursion. The Learner Health Information Form (Appendix B) must be completed and submitted to school
- d) The school must advise the parents or guardians where to obtain inoculation certificates, if applicable
- e) If a learner will need to acquire traveling documents these must be obtained at least 14 days prior to the date of departure.
- f) If the excursion involves transportation of learners, a road worthiness certificate, details of the driving license and professional driving permit of the main and substitute drivers as well as details of the vehicle's owner and insurance and these details must be given to the supervisory team

**Note: A public school must not request or force any parent or guardian to sign any indemnity form that indemnifies the school against any legal action that may arise as a result of the school activity and no learner shall be excluded from participating in any excursion for failing to submit such indemnity form.**

## **13.7 RISK ASSESSMENT**

### **13.7.1 Assessment of risks prior to undertaking a trip**

The excursion management committee must conduct a risk analysis of the:

- I. Environment;
- II. Transport arrangements;
- III. Level of each learner's capacity in relation to activities to be conducted;
- IV. Capabilities of the supervisory team to perform its functions optimally

### 13.7.2 Assessment of the environment

- a) The excursion management committee must determine the suitability of
- i) The venue relative to the number of learners, their ages, skills and experiences,
  - ii) The planned activities and the supervision required.
  - iii) The venue selected for overnight stay to ensure that it complies with minimum health and safety standards.
- b) Where **billeting** is a component of an excursion, the excursion management committee must:-
- i) advise the parent/guardian of the host family of their responsibilities;
  - ii) receive a written statement from the parent/guardian of the host family prior to the excursion giving an assurance to provide a safe and secure home environment for each billeted learner including undertakings that:
    - a) the household members do not have criminal convictions that may preclude the host family from billeting a learner;
    - b) the accommodation includes:
      - i) A private bedroom or one shared with a learner of the same gender;
      - ii) Bathing and toilet facilities with privacy;
      - iii) Consideration is given to any special requirements (e.g. health, disability, avoidance of asthma triggers etc.)
    - c) the learner will not be exposed to passive smoking; and
    - d) a nominated member of the supervisory team will be notified of any travel by the learner involving an overnight stay during the period of the billet.
    - e) ensure that a nominated member of the supervisory team can be contacted for the duration of the billet.

### 13.8 Assessment of transport related risks

- a) The excursion management committee must ensure that arrangements for the safe transportation of excursion participants to and from the excursion have been made.
- b) Where parents/guardians have given approval for their child/children to make their own transport arrangements to and/or from a venue, a nominated member of the supervisory team must acknowledge the arrival and approve the departure of the learner from the venue. The name and contact details of the person who transported the learner to and collected the learner from the excursion
- c) The use of private and commercial vehicles must comply with the requirements of the Road Traffic Act and all applicable legislation. KZN Circular No 24 of 2010 must be taken into consideration.
- d) Transport by air must comply with the requirements of the South African Aviation Authority.
- e) If a learner is required to leave an excursion prior to the scheduled time, a nominated member of the supervisory team must be satisfied that appropriate arrangements are in place for the learner to reach his/her destination safely.

### **13.9 Assessment of Learners' capacity**

- a) The excursion management committee must be aware of health care maintenance and/or intensive health care needs of learners. (Provide First Aid kit)
- b) A re-assessment of learners' capacity must be undertaken if any circumstances surrounding the excursion activity change. This includes any change in the condition of the environment or in the medical fitness (e.g. conditions such as asthma or epilepsy) or capacity of the learners to undertake a physical activity.

### **13.10 Assessment of skills of the supervisory team**

- a) The excursion management committee must ensure that there is a supervisor or supervisory team with appropriate experience, knowledge and skills to identify and manage potential risks at any stage during an excursion. The supervisor : learner ratio must, at least be 01 educator, parent or adult for every 20 learners in primary schools or 01 educator, parent or adult for every 30 learners in secondary schools

- b) The excursion management committee must determine the number of supervisory team members and the supervision strategies necessary to ensure a safe excursion.
- c) Collectively, the supervisory team must have the skills to:
  - i) Identify and establish a safe activity environment;
  - ii) Effect a rescue and evacuation strategy and also render emergency care;
  - iii) Monitor and respond to changes in the weather and environmental conditions before and during excursion activities taking into consideration the age, experience and ability of the learners;
  - iv) Monitor and assess the health and physical well being of the learners;
  - v) Ensure that learners behave in accordance with the schools code of conduct at all times during the excursion; and
  - vi) Ensure that other members of the supervisory team do not display improper conduct during the excursion.

### **13.11 Identification of Excursion Participants during an excursion**

- a) The excursion management committee must decide on a suitable system(s) of identification for excursion participants based on the assessment of the environment, learners' skills, the type of activities to be undertaken, and the number of learners where learners are not in clear view of the supervisors.
- b) Systems for identifying learners could include the wearing of:
  - i. School uniforms;
  - ii. School T-shirts;
  - iii. school hats;
  - iv. name tags;
  - v. neoprene armbands or
  - vi. wrist bands
  - vii. a combination of the above-mentioned systems of identification
- C) Excursion management planning must include the development of communication strategies to enable regular communication amongst all members of the group. These may include PA system, air horn, whistle, vuvuzela etc.

### **13.12 Additional Requirements for International Travel**

- a) The state of the international political climate may lead to the decision to postpone or cancel an international excursion on short notice
- b) The decision to proceed, postpone or cancel an international excursion should be made by the principals of participating schools in consultation with parents/guardians of the participating learners and the Department of Education, where appropriate, the Department of Foreign Affairs.
- c) The principal must take the precautionary measure of determining the conditions that provide for cancellation or deferment of air ticket purchases.
- d) The excursion management committee must assure themselves, a day or so before the scheduled departure, that the chosen destination for the excursion is safe by contacting the Department of Foreign Affairs.
- e) The excursion management committee must obtain the telephone number of the South African Consulate in the country to be visited.
- f) Where the Department of Foreign Affairs does not deem the destination to be a risk to participants but parents/guardians do, their consent for their children to participate may be withdrawn from the excursion.
- g) Where a state employed educator in-charge in a public school has responsibility for organising an international excursion that involves learners from a public school, a Risk Cover for learners should be in place.
- h) Where a School Governing Body employed educator has the responsibility for organising an international excursion that involves learners from a public school, the Public Liability Insurance will be supplied by the employer.

### **13.13 Privately Arranged Activities**

- a) Principals must ensure that staff and parents/guardians are aware that privately arranged activities are not approved by the school and the Department of Education and that, accordingly, neither the school nor the KZN Education Department will accept any responsibility for learners or staff members who choose to participate in privately arranged excursions. The

responsibility for the activity will rest entirely with the individual who arranges the activity in his or her private capacity. The principal must advise parents that participation in such activities excludes the school and the department from any responsibility and from any claims arising therefrom.

b) Educators who arrange Excursions without ensuring Departmental policy is followed, will be personally liable in the event of an accident, injury, loss or any other claim arising therefrom. In such circumstances, staff may not be afforded the Department's protection under the principle of vicarious liability (i.e. where an employer bears the cost of damages resulting from an employee's negligence). Similarly, staff may not be covered by Workers' Compensation if they are injured while involved in an excursion activity that does not have the written approval of the Department of Education.

c) The National Protocol on Events involving learners organized by other government departments, non-governmental organizations, groups or individuals must be considered and adhered to. Principals of schools must display the Protocol in prominent places in their schools.

#### **13.14 Reporting Processes**

- a) Immediately after returning from a school activity, the supervising educator must submit a detailed excursion report to the principal within 5 working days so that if any action needs to be taken it can be done immediately.
- b) The report must include the following, if applicable:
  - i) accident
  - ii) injury to a learner, educator, driver or any other person or
  - iii) any act of misconduct on the part of a learner, educator, driver or any other person
  - iv) the nature of the accident, injury or act of misconduct
  - v) the date time and place of the incident
  - vi) procedures which were followed in dealing with the incidents.
- c) The Principal must take necessary disciplinary steps against persons who commit acts of misconduct during the excursion, as contained in the excursion report.

## 14 Annexure and Forms

FORM 1 - APPENDIX A – Application Form.....

FORM 2 - APPENDIX B - Sample Learner Health Form.....

FORM 3 - APPENDIX C - Confidential Declaration.....

FORM 4 - APPENDIX D - Sample Parent/Guardian Consent Form.....

## FORM 1



### APPLICATION FORM

#### APPLICATION BY A PUBLIC SCHOOL FOR APPROVAL TO UNDERTAKE A SCHOOL ACTIVITY

The principal of the applicant public school must complete this application form.

#### PART A

##### 1. Details of the school

1.1	District	
1.2	Circuit	
1.3	Ward	
1.4	Name of the school	
1.5	EMIS number	
1.6	Name of principal	
1.7	Contact details of the school	
1.8	Contact no. of principal	
1.9	Physical address of the school	

##### 2. Governing body contact details

	SGB official	Full names	ID number	Contact telephone number	Expiry date of term of office
2.1	Chairperson				

2.2	Secretary				
-----	-----------	--	--	--	--

### 3. Purpose of the school activity

Objective:						
Curriculum linkage						
Attach copy of Year Plan for school activities						
Does this application adhere to the stipulated timeframes (tick)					Yes	no
Destination						
<b>Day visit</b> (Place a tick)			<b>Overnight visit</b> (Place a tick)			<b>No. of days</b>
If overnight indicate types of accommodation:						
Indicate Catering arrangements:						
Is the Health Certificate available					Y	N

### 4. Activities of learners during school activity


### 5. Composition of school activity participants

Number of learners			Total	Number of educators			Total	Number of parents or other adults			Total
No. of boys	No. of girls			males	females			males	Females		

**6. Names of educators and parents or other adults who will accompany the learners**

No	Names	Phone numbers	Designation

**7. Details of funding arrangements for the school activity**

Cost of the school activity per person:
Source of funding
Support strategy for learners whose parents cannot afford to pay their participation in the school activity:

**8. Transport details**

8.1 Name of company providing transport or name of the owner of vehicle: \_\_\_\_\_

8.2 Address and telephone contacts:

\_\_\_\_\_

\_\_\_\_\_

8.3 Roadworthy certificate:

Date of issue: \_\_\_\_\_ Expiry date: \_\_\_\_\_

8.4 Details of the driver:

Name of the driver \_\_\_\_\_

Driving license and code \_\_\_\_\_

Expiry date \_\_\_\_\_

Expiry date of professional driving permit \_\_\_\_\_

Company's or vehicle owner's insurance (name and policy number)

\_\_\_\_\_

8.5 Details of the substitute driver:

Name of the substitute driver \_\_\_\_\_

Driving license and code \_\_\_\_\_

Expiry date of profession driving permit \_\_\_\_\_

Company's or vehicle owner's insurance (name, policy number and contact details)

\_\_\_\_\_

.....

Signature of Principal Signature of SGB Chairperson Date

**Approved/Not Approved (for intra-District Excursions)**

**Supported / Not Supported**

.....  
.....

.....  
Name of Circuit Manager Signature Date

**Supported/Not Supported**

.....  
.....

.....  
Name of Circuit Manager Services Signature Date

**Approved/Not Approved (for inter-District Excursions)**

**Supported / Not Supported (for Inter-Provincial Excursions)**

.....  
.....

.....  
Name of District Manager Signature Date

**Supported / Not Supported (Inter-Provincial & International Excursions)**

.....

.....

.....

Name of General Manager

Signature

Date

**Approved/Not Approved (For Inter-Provincial Excursions)**

**Supported / Not Supported (for International Excursions)**

.....

.....

.....

Head of Department

Signature

Date

**Approved/Not Approved (For International Excursions only)**

.....

.....

.....

**FORM 2**



**APPENDIX B**

**SAMPLE LEARNER HEALTH FORM [PMS1]**

- This information is required for each learner participating in the excursion.

**STRICTLY CONFIDENTIAL**

**LEARNER DETAILS**

- Learner's date of birth: \_\_\_\_\_
- Learner's name: \_\_\_\_\_
- Parent/guardian's full name: \_\_\_\_\_
- Postal address: \_\_\_\_\_
- Postcode: \_\_\_\_\_
- Telephone no.(home): \_\_\_\_\_ (cell): \_\_\_\_\_  
fax): \_\_\_\_\_

- Is your child subject to seizures, fainting, epilepsy, diabetes or any other condition that may affect his or her safety during the excursion/trip or tour?

- Work address: \_\_\_\_\_
- Family doctor: \_\_\_\_\_
- **Medical Aid details:** (Yes/No) If "yes", please give details:

**Is your child allergic to:**

- Penicillin (*Please give details*): \_\_\_\_\_

- Any other drug:\_\_\_\_\_
- Any food:\_\_\_\_\_
- Other:\_\_\_\_\_
- Date of last tetanus vaccination:\_\_\_\_\_

**Medication:**

- Parents/guardians are requested to make arrangements with the trip/excursion committee for the safe keeping and handling of prescribed medications prior to the excursion.
- Is your child presently taking tablets and/or other forms of prescribed medication? Yes/ No:\_\_\_\_\_
- Does your child self-administer the medication? Yes/ No:\_\_\_\_\_
- If "yes", state name of medication, dosage and frequency of use:\_\_\_\_\_

**Other information**

- Please provide any other information about your child which will enable the organisers of the excursion to provide better care for your child.

**FORM 3**



**APPENDIX C**

**CONFIDENTIAL DECLARATION**

**This form is for persons who are not employees of the KZN Department of Education**

Please place a tick in one of the boxes below.

(1) I declare that I **do not have** any convictions, circumstances or reasons that might preclude my working with or near children.

(2) I declare that I **do have** convictions, circumstances or reasons that might preclude my working with or near children. The nature of these convictions, circumstances or reasons is outlined

below: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I certify the accuracy of the above information. I am aware that I may be required to provide a police clearance if it is considered necessary to verify the information provided.

Surname & Initials: \_\_\_\_\_ Date: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Signature: \_\_\_\_\_

Telephone: \_\_\_\_\_

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

**FORM 4**



**APPENDIX D**

**PARENT CONSENT FORM**

**TO BE SIGNED BY THE PARENT AND RETURNED TO SCHOOL.**

Name of School \_\_\_\_\_ Ward \_\_\_\_\_

**Parent's Contact telephone numbers**

Home: \_\_\_\_\_ Work \_\_\_\_\_ Mobile \_\_\_\_\_

I have read and understood the information regarding the school excursion to be undertaken by my son/daughter (name) \_\_\_\_\_ who is in grade \_\_\_\_\_

I do/do not give my consent for my child to participate in the school excursion as indicated below

Date from \_\_\_\_\_ to \_\_\_\_\_

Destination: \_\_\_\_\_

Name of Consenting Parent \_\_\_\_\_

Signature of parent: \_\_\_\_\_ Date \_\_\_\_\_

- The following details have changed from those recorded on my child's medical information form (*Please attach further information to this effect*).

## 15. Consultation – Management Plan

Date	Activity	Objective	Responsible Person	Progress
26 September	First meeting of DoE Task Team	Develop POLICY FRAMEWORK and Management Plan	Dr EV Nzama	Meeting drafted the first policy draft
28 September	Submission of a draft framework of Learner Transport Policy and a Management Plan to Mr E Mosuwe, SGM	Consult with Top Management and MMM and input into the draft	Mr E Mosuwe	Draft submitted to SGM for his perusal
3 October	Meeting with Task Team members from the Department of Transport on the Draft and Management Plan	Inputs from the Department of Transport and the verification and audit of the existing documents regulating learner transportation and the transport of the dedicated citizens.	Mr E Mosuwe	Draft was circulated to the Task Team Members and to the Officials from DoT.
5 October	Finalisation of the second draft of the Policy and Plan	Document ready for the road shows	Dr EV Nzama	
18 – 19 February 2013	Consultation of stakeholders <ul style="list-style-type: none"> <li>• Education Portfolio Committee</li> <li>• Transport structures</li> <li>• Transport partners</li> <li>• Parents (SGB Associations etc)</li> <li>• Learner structures (RCL.</li> </ul>		Dr EV Nzama	

		COSAS etc) <ul style="list-style-type: none"> <li>• Educators (Unions, Principals associations etc)</li> </ul>			
22 February 2013	Final Draft finalized			Dr EV Nzama	
28 February 2013	Submission to MEC for Education for final approval			Dr EV Nzama	
01 March 2013	Implementation date	KZN Circular to inform the system		DoE	

#### Approach in the consultation process

Stakeholder	Guiding questions
Education Portfolio Committee	<ul style="list-style-type: none"> <li>• Expected role of DoE</li> <li>•</li> </ul>
Transport structures	<ul style="list-style-type: none"> <li>• Safety of transport system</li> <li>• Role of DoE</li> <li>• Role of DoT</li> <li>• Type of transport</li> <li>• Vision of the learner transport system</li> </ul>
Transport partners	<ul style="list-style-type: none"> <li>• Safety of transport system</li> <li>• Role of DoE</li> <li>• Role of DoT</li> <li>• Type of transport</li> <li>• Vision of the learner transport system</li> <li>• Formalisation of partnership</li> </ul>
Parents (SGB Associations etc)	<ul style="list-style-type: none"> <li>• Type of drivers</li> <li>• Type of transport</li> <li>• Role of departments in the learner transportation system</li> <li>• Safety of the system</li> </ul>
Learner structures (RCL. COSAS etc)	<ul style="list-style-type: none"> <li>• Type of drivers</li> <li>• Type of transport</li> <li>• Role of departments in the learner transportation system</li> <li>• Safety of the system</li> </ul>
Educators (Unions, Principals associations etc)	<ul style="list-style-type: none"> <li>• Vision on learner transport system</li> <li>• Type of drivers</li> <li>• Type of transport</li> <li>• Role of departments in the learner transportation system</li> <li>• Safety of the system</li> </ul>

**16. Effective date of implementation: 01 March 2013**