

Guidelines on Study Tours Outside Hong Kong¹

Study Tours outside Hong Kong

Planned and organised by schools, study tours outside Hong Kong enable students to take part in visits, exchange programmes, studies or services in other places under the care of school-appointed escorts. The Guidelines below mainly seek to remind schools to ensure the safety of study tour participants. Schools should make reference to the curriculum guides on various Key Learning Areas and design suitable study tour programmes according to their school-based curriculum and the needs of their students, including programmes that help achieve learning objectives and corresponding activities.

I Planning and Preparation

- 1) Schools should make overall planning of study tours outside Hong Kong in light of their development priority and school-based circumstances, such as manpower arrangement, estimated expenditure, number of tours and schedule of other school activities.
- 2) All escorts in the study tour should have experience in leading students' outdoor activities or overseas visits, with at least one of them being a teacher of the school.
- 3) At least one of the escorts or participants should have received training in first aid.
- 4) Each study tour should be led by at least two escorts, with each escort² taking care of no more than 10 students³.
- 5) Schools should maintain proper communication with teachers in assigning suitable teachers to escort students in exchange programmes and make appropriate teacher deployment with respect to the objectives and arrangements of each activity. Considering the flight schedule of individual tours and teachers' work schedule for the day immediately following their return to Hong Kong, schools should flexibly re-arrange the teaching schedules of the teachers concerned to allow enough rest before resumption of normal duties. Whenever necessary, schools may seek advice and instructions from their respective school management committees.

¹ This Guide is extracted from the Guidelines on Outdoor Activities (GOA) for easy reference. Schools, in planning for overseas visits, should refer to relevant parts of the GOA for reference/necessary actions.

² Apart from school teacher(s)/staff, escort(s) may also include adult(s) appointed by the school, such as parents and alumni. Escorts should understand thoroughly the nature of the activity and be aware of the problems that are likely to arise. They should also undertake to take care of and supervise the students during the conduct of activities and in daily living.

³ For the manning ratio for special schools, please refer to [Appendix X](#) of the "Guidelines on Outdoor Activities": "Manning Ratio for Outdoor Activities Involving Students with Special Educational Needs" and make appropriate arrangements.

- 6) The capability of the participants⁴ must be taken into consideration when deciding the destination, itinerary, duration of the tour, etc., and stakeholders and parents should be consulted on the details to ensure that the activity can be conducted effectively.
- 7) Factors including climate, accessibility, condition of hygiene, language, accommodation and food should be taken into account when selecting the destination of the tour.
- 8) Places with potential hazards, such as political unrest, poor public order, epidemic disease outbreaks, threats of earthquake or frequent occurrence of typhoons and flood, should be avoided.
- 9) Schools should draw up contingency plans (e.g. procedures to deal with delay or cancellation of the tour because of changes in weather conditions, Air Quality Index/air pollution level (as appropriate), political environment or transportation; participants who back out midway; or accidents) in advance, and inform all students and their parents of such plans. Schools should also set up an emergency notification system with parents and collaborators/host organisations so that different parties can be reached any time.
- 10) Itinerary-related information, such as the addresses and telephone numbers of the lodging places; location of local police stations, hospitals, clinics or first-aid units; and emergency numbers for rescue services in places covered by the itinerary, should be collected. Before the trip, such information may be given to parents and the responsible person staying in the school for emergency use.
- 11) Schools should organise a briefing session to inform students, parents and accompanying members of the details of the tour, responsibilities of each party and school rules that students and parents are expected to follow. Students should be reminded of the need to follow the escorts' instructions and observe all safety regulations throughout the trip.
- 12) Pre-tour training preferably covering the following areas should be provided as far as possible:
 - (a) orientation;
 - (b) team spirit;
 - (c) discipline;
 - (d) manners and behaviour;
 - (e) safety measures – protection against mosquito bites, fire precaution and escape, proper use of electrical appliances, food hygiene, road safety,

⁴ Participants generally refer to all members of a study tour.

protection of personal belongings, actions to be taken when going astray or getting injured, etc.;

- (f) immigration (customs) procedures;
 - (g) luggage – clothing, medicine, cash, etc.;
 - (h) social customs and taboos of the place of visit;
 - (i) points to note for travelling abroad; and
 - (j) contingency plan.
- 13) Preferably two or more students should be assigned to the same room for better mutual care when allocating accommodation. Once the arrangement for accommodation is finalised, to avoid confusion, no student should be allowed to switch rooms without good justification.
- 14) Schools should study and follow, as appropriate, the travellers' health advice on health risks and vaccinations given in the relevant webpage of the Department of Health (<http://www.travelhealth.gov.hk/eindex.html>).
- 15) Schools should obtain from parents of each student a letter of prior consent and a health certificate and study the health condition of the students. If a participant feels unwell before setting off, the school or the escorts should advise the participant to seriously consider whether it is wise to insist on joining given his/her health condition and to consult a doctor. If a participant shows symptoms of having contracted an infectious disease, it will be in the interest of the safety of the other group members that he/she should refrain from joining the tour.
- 16) Schools should examine the validity of the travel documents held by participants at the earliest and, if necessary, check their certificates of immunisation. If their travel documents are not valid or the vaccination they have received does not satisfy the requirements laid down by the authorities of the place of visit, schools should remind the participants to take speedy actions accordingly.
- 17) Each participant of the study tour should have appropriately taken out travel and medical insurance. Schools should remind parents to make their own purchase (including medical insurance, personal accident insurance and insurance covering costs for emergency service) in light of individual needs for enhanced protection. Alternatively, schools may take out relevant insurance for students/teachers on behalf of parents/teachers upon obtaining their consent; however, parents/teachers should be given full discretion in accepting such an arrangement.

II. Points to Note during the Study Tour

- 1) Escorts should pay attention to local weather forecasts and news broadcasts. If

there is going to be any change in weather or other conditions, a contingency plan should be activated as soon as possible.

- 2) Escorts should be fully aware of the health condition of each participant in order to determine which participants are fit to take part in the activity of the day. Timely and appropriate arrangements should be made on a case-by-case basis. Escorts should also arrange for any sick member to see the doctor as soon as possible. On the advice of the doctor, effective health measures should be taken to enable the recovery of the patient and prevent the other tour members from getting sick. If necessary, escorts should inform the parents and the school of the students' health condition as soon as possible.
- 3) Escorts should bring along the necessary safety equipment for the tour, for example, a first aid kit, communication equipment (mobile phones) and torches.
- 4) Students may be divided into small teams, with each team supervised by an escort.
- 5) The safety of the participants is the prime concern of the tour. Activities should preferably be conducted in one large group or in small teams so that no student would be working alone. Escorts should advise students to have a copy of their travel documents with them for identification purpose where necessary. Moreover, if students detect anything suspicious/unusual, they should report it to their escorts as soon as possible.
- 6) Participants should be fully briefed on the programme or schedule before commencement each day. Upon conclusion of activity that day, a debriefing session should be held to review participants' performance, programme arrangements and relevant safety measures, and preparations should be made for the activity of the following day.
- 7) When travelling by any means of transport (including plane, vessel, train or motor vehicle), participants should stay alert, observe relevant safety regulations and look out for emergency escape routes or exits.
- 8) Escorts should be aware of the speed of the vehicle in which they are travelling to ensure that it is within safety limits. They should express to the driver or host personnel their safety concerns when necessary. Moreover, escorts should ensure that the driver gets sufficient rest or works according to duty roster to avoid prolonged driving without breaks. It is not advisable to press ahead with the journey when the weather is bad or when the schedule is tight.
- 9) After checking into a local hotel, students should immediately look out for the fire escape route. They should also acquaint themselves with the exit direction, escape route and assembly point in case of emergency.

- 10) Escorts should carry with them such information as the name list and hotel room numbers of their group members to facilitate assembly and a roll call. Participants should also be advised of the room numbers and telephone numbers of their escorts to facilitate communication.
- 11) Escorts should always remind participants to take proper care of their travel documents and personal belongings.
- 12) Participants should put the room key, a torch and any important articles in a handy place before going to bed, so that these can be snatched quickly even in the dark.
- 13) Participants should pay attention to food hygiene and avoid consuming uncooked food and unboiled water. They should also avoid patronising unhygienic stalls or restaurants.
- 14) Participants should wash their own clothing regularly and maintain good personal hygiene. They should avoid staying long in crowded or heavily polluted places. If necessary, they should wear a mask to reduce the risk of being infected by bacteria or viruses.
- 15) Each participant should wear a watch and take note of the time of assembly and return for all activities. They should arrive at the designated assembly point punctually as instructed.
- 16) Participants should bring along clothing with long sleeves and long legs, mosquito repellent oil/cream, sunblock, etc. to prevent mosquito or insect bites and sunburn.
- 17) If a student needs to leave the party temporarily, he/she should seek prior approval from the school through his/her parents. While away from the party, the student should be accompanied by a designated adult. The student should also inform the escorts and other members of the tour the place he/she is visiting, the expected time of return and the way of contact before return.
- 18) Participants should make sure that they have sufficient time for rest and recovery and they are fit enough for the entire journey.
- 19) Escorts should report regularly to the responsible person of the school staying in Hong Kong the condition of all tour members and the progress of the activities under the established reporting mechanism, so that the school is updated constantly and able to respond to parents' enquiries with the latest information.
- 20) Under all circumstances, participants' absolute safety should be accorded the highest priority and in no way should this be compromised. If there are extraordinary situations that warrant the involvement of local authorities such as the police, escorts should act accordingly without delay.

- 21) If assistance is needed during the tour, escorts should consider calling the 24-hour hotline (No.: +852 1868) operated by the Assistance to Hong Kong Residents Unit of the Immigration Department (<http://www.gov.hk/en/residents/immigration/outsidehk/assisthk24.htm>).
- 22) In the event of accident (e.g. traffic accident or fire), other emergencies (e.g. robbery or assault), injury or loss of life in the Mainland, the incident should be reported to the local public security authorities for action: dial 110 for police assistance; dial 120⁵ for ambulance service; dial 119 for fire service; and dial 122 for reporting a traffic accident.
- 23) Hong Kong residents in need of help when abroad may contact the local Chinese diplomatic and consular missions for assistance and services. Hence, escorts should keep at hand the information of relevant Chinese diplomatic and consular mission(s). (https://www.immd.gov.hk/eng/services/Assistance_Outside_Hong_Kong.html#c)

III. Overall Considerations

- 1) When devising safety measures, schools should refer to the above information and make necessary adjustments having regard to the nature of the tour, the ability/condition of the participants and the environment of the place of visit, so as to strike a balance between the objectives of the activity and the principle of safety.
- 2) The Security Bureau of the Hong Kong Special Administrative Region Government has set up an “Outbound Travel Alert” (OTA) system on its website to promote understanding of the threats to personal safety in travelling to destinations that are popular among Hong Kong residents. Schools should exercise prudence and observe the OTA issued by the Security Bureau when planning study tours. Details of the OTA system can be accessed by visiting the following webpage: <https://www.sb.gov.hk/eng/ota/index.html>.
- 3) The Immigration Department provides the “Registration of Outbound Travel Information” (ROTI) service on its website. Escorts (e.g. teacher leaders) may register their contact details and itinerary using this online service, which allows the Assistance to Hong Kong Residents Units of the Immigration Department to reach members of the study tours and offer practical assistance in the event of emergency outside Hong Kong. Details of the ROTI service can be accessed by visiting the following webpage:

⁵ Fees are generally charged for medical services. Users need to pay for ambulance service, emergency treatment, etc.

- 4) Schools should make sure that all students, with or without disabilities, are given equal opportunities to participate in study tours if circumstances permit. Moreover, schools should provide students with disabilities with the assistance they need. For example, “identification and S.O.S. cards” should be specially prepared for students with intellectual disability to carry along, and their photographs and copies of their travel documents should be kept at hand by escorts for emergency use.
- 5) Schools should read carefully the EDB circular memorandum on Block Insurance Policy (BIP)⁶ to familiarise themselves with the clauses and coverage of any such policy and ensure the compliance with the guidelines and instructions therein⁷. Generally speaking, the BIP does not provide comprehensive personal insurance coverage for students/teachers. If parents/teachers wish to have comprehensive personal insurance coverage, e.g. travel insurance, medical insurance, they may acquire it at their own cost as mentioned in Point 17 in Part I of the Guidelines or schools may do so on behalf of parents/teachers with their consent. Moreover, schools are required to observe the following:
 - a) All escorts should be appointed by the school. Such appointments, and the programme, place and schedule of the visit must be approved by the school and put on record.
 - b) Queries, if any, about the coverage of a policy should be clarified with the insurance company and the insurance company should be contacted immediately after the occurrence of an accident.
- 6) Schools organising a study tour on their own or in collaboration with agents or overseas education institutions should make reference to Chapter 1 “*Notes for Heads of Schools and Teachers/Instructors*” and Chapter 2 “*General Measures for Activities on Land*” of the “Guidelines on Outdoor Activities” as well as the relevant circulars/letters issued by the EDB. Schools should also carefully observe and follow the tendering and procurement procedures applicable to the school category to which they belong.

⁶ The BIP does not provide comprehensive personal insurance coverage for students/teachers. If parents/teachers wish to have comprehensive personal insurance coverage for their children/themselves, e.g. travel insurance, life insurance, personal accident insurance, medical insurance or critical illness insurance, they may acquire it separately at their own cost from any insurance company. If it is considered necessary to take out additional group personal accident insurance for students/teachers participating in school activities, schools may do so on behalf of parents/teachers with their consent. However, parents/teachers should be given full discretion in accepting such an arrangement.

⁷ If civil servants serving government schools are injured in accidents when participating in study tours outside Hong Kong, their schools should timely report and handle the cases according to the relevant Civil Service Regulations on duty-related injuries.

- 7) Schools may draw on the human resources of organisations inside the school, such as Parent-Teacher Association and alumni association, to organise activities. However, the organising work of study tours should be led by schools to ensure that the activities align with their school-based curriculum and cater for the needs of their students. Besides, schools should make good use of the resources provided by the EDB, such as the additional administrative manpower/resources for all public sector schools and schools under the Direct Subsidy Scheme (DSS schools) starting from the 2019/20 school year (i.e. those provided under the “One Executive Officer for Each School” policy) to strengthen their financial management and administrative support.
- 8) If agents are commissioned to organise study tours outside Hong Kong according to applicable tendering and procurement procedures, the agents commissioned must be licensed travel agents, and the accompanying staff must be holders of a valid Tour Escort Pass issued by the Travel Industry Council of Hong Kong/Travel Industry Authority. In addition, to safeguard the interests of participants, schools may request the agent commissioned to produce a sexual conviction record of the accompanying staff, and provide such information as the age of the coaches allocated, the safety equipment on board and the drivers’ driving history.
- 9) For procurement of services from travel agents, schools should take into account the actual operations and possible incidents when drafting the contracts. Relevant provisions, such as specific requirements for itineraries and visits, mechanism for making changes to the itinerary, instalment arrangement, liability clauses for force majeure and refund arrangement due to the cancellation or delay of study tours, should be included to better protect the school’s interests. Each school should seek its own independent legal advice and, where necessary, the advice of other relevant professionals, on the terms and conditions to be adopted in the invitation letters and written quotation/tender document/contract for each invitation of written quotation/tender exercise/contract preparation.
- 10) The Travel Industry Council of Hong Kong has uploaded onto its website the “Code of Business Practice on Study Tours and Exchange Tours”, which comprises points to note for organising study tours. Schools are advised to make reference to the Code before planning their study tours. Moreover, the Council offers courses for tour escorts on a regular basis. Schools may consider making arrangements for their teachers to attend these courses in light of their needs. Relevant information can be accessed by visiting the following webpages:

- Code of Business Practice on Study Tours and Exchange Tours

<https://www.tichk.org/en/codes/directives/outbound>

- Course details
Travel Industry Council of Hong Kong Website: <https://www.tichk.org/en>,
Home → Industry Training and Examinations)

IV. References

- Guidelines on Outdoor Activities
(EDB Website: www.edb.gov.hk, Home → School Administration and Management → Administration → About Activities → School Activities Guidelines)
- Trading Operations and Procurement Procedures in Aided Schools
(For procurement of services and trading operations for study tours, schools should comply with the relevant requirements:
EDB Website www.edb.gov.hk, Home → School Administration and Management → Financial Management → Notes to School Finance → Reference Materials on Trading Operations; and
EDB Website www.edb.gov.hk, Home → School Administration and Management → Financial Management → About Financial Management → Reference Materials on Procurement Procedures in Aided Schools)
- School Crisis Management
(EDB Website www.edb.gov.hk, [Home](#) → Teachers Related → School Crisis Management)
- Passing on the Torch National Education Platform — Tips (on emergency and crisis management procedures during schools' mainland exchange programmes, and formulation of appropriate contingency plans)
(<https://www.passontorch.org.hk/en/resources/main/7/264.html>)
- Travel Assistance
(Immigration Department Website: www.immd.gov.hk, Home → Our Services → Travel Assistance)
- Register of Travel Agent Licences
(Travel Industry Authority Website: www.tia.org.hk , Home → Licensing → Register → Register of Travel Agent Licences)
- Request for Urgent Assistance
(Beijing Office Website: www.bjo.hk, Home → Request for Urgent Assistance)
- Sexual Conviction Record Check
(Hong Kong Police Force Website: www.police.gov.hk, Home → e-Services → Sexual Conviction Record Check)
- Beijing Heavy Air Pollution Contingency Plan
(The People's Government of Beijing Municipality webpage:
http://english.beijing.gov.cn/latest/lawsandpolicies/202007/t20200723_1957677.html)

Education Bureau
June 2024