

## Field Trip Checklist

Anytime students leave the school facilities on a field trip, there are many exposures that are present. Many of these exposures can be avoided. Clear Risk Solutions is always available to help with recommendations to minimize the risk associated with these field trips. We feel that a field trip should be beneficial to learning. Here is a checklist for you to complete prior to your field trip. Keep in mind that Clear Risk Solutions does not recommend the following activities: swimming, boating, rafting, or any other water-related activities, mountain climbing, bungee jumping, skydiving, racing, or any other “extreme” sport activities. Use your best judgment. If you don’t feel comfortable, then don’t give the “green light”. Please contact our office prior to the field trip for recommendations, or if you have additional questions.

1. \_\_\_ We recommend the use of a professional trip planning organization to assist you in conducting any long- term or foreign travel. These companies can help with airline, hotel, and itinerary planning.
2. \_\_\_ PARENTAL PERMISSION SLIP – Does the school have in its possession, each child’s signed permission slip. If a child has not given it to the proper authority at the school, then they do not go.
3. \_\_\_ BEHAVIOR PLAN – What will the plan be for students who break the rules?
4. \_\_\_ MEDICAL PLAN – Does the school have in their possession prior to and during the trip, a list of each child and their medical history, i.e. allergies, medications, and a PDA (parent designated adult) to administer any meds that are required for diabetic children?
5. \_\_\_ SUPERVISION PLAN – What is the student to chaperone ratio? Depending on student age and the nature of the activity, we generally recommend four students to one chaperone. If group is mixed gender then one male and one female chaperon is needed. We recommend that at least one chaperone be first aid/CPR trained, and they all have FBI background checks done, specifically on overnight trips. Be responsible when choosing a chaperone.
6. \_\_\_ TRANSPORTATION PLAN – How will the students reach their destination? School based transportation is **preferred**. **NEVER** let a student drive.
7. \_\_\_ MEAL PLAN – Will food be provided, or are students responsible for their own meals? Make parents aware! They will need to make arrangements for their children if you are not providing meals. Also, be sure to have a list of foods that different children are allergic to.

8.\_\_\_\_ LODGING PLAN – If this is an over night trip, do the parents have the proper phone number and address? Are there separate sleeping areas and bath/shower facilities for the boys and girls? Make sure that the children are packed appropriately for this overnight stay. Also, avoid situations that involve just one student and one chaperone, especially opposite sex. Make sure chaperones have more than one student around them.

9.\_\_\_\_ PRIOR APPROVAL – Has your field trip been approved by the school board and superintendent? Have you consulted with Clear Risk Solutions for recommendations?

### **SCHOOL TRIPS**

#### **CONTROL OF FUNDS:**

1. Receipt of funds-either in district or ASB accounts
2. Expenditure of funds via PO or district procedures
3. No gift of public funds
4. No co-mingling of funds
5. If a private vendor is used (i.e. travel agent), does potential expenditure require bidding?
6. If school uses a contractor for services, will the vendor take personal frequent flyer miles and will the vendor take personal credit cards for payment, if needed?

#### **FUNDRAISING:**

1. Opportunity to raise funds for trip
2. Fund raiser needs approval of either principal or school board
3. All monies earned are deposited either in District or ASB Account—NO SLUSH FUNDS
4. Attempts at fiscal accounting are required
5. (If a car wash, then record the number of cars washed and reconcile to amount collected)
6. If each student shares in the benefit of the receipts via credit to his account within the school fund, it is recommended to use a parent under the direction of a school person to develop a spreadsheet indicating the credit of the funds to the student's account and include the spread sheet with the deposit to the school district or ASB. (This involves parents and reduces the work for secretaries)
7. Compile a total accounting of all fund raising efforts for the trip so each student knows how much they need to commit to pay from personal funds.
8. Excess amounts can be prorated among those students who worked on the fundraisers.

#### **INSURANCE COVERAGE:**

- If travel is out of the country, does liability coverage exist? (Coverage questions must be asked for each trip, as travel restrictions can potentially change in a short period of time)
- Personal accident insurance coverage is required.
- Emergency treatment cards must be in possession of chaperon, including consent to treat and insurance policy information. To include, food allergies, medical conditions, etc.
- Knowledge of medically fragile students and treatment must be obtained prior to leaving.

- First aid trained chaperones are recommended.
- A written EMERGENCY PLAN dealing with accidental injuries or illness must be in place before leaving.
- Is travel trip insurance available and has the coverage been purchased?
- If vendors are used, hold harmless mutual agreement, certificate of insurance with 2 million dollars in limits and school named as additional insured are required.

#### SUPERVISION:

- Is the sponsor a staff member working within the scope of their district duties?
- Is there a written plan for supervision?
- Ratio of chaperones to students: over night 1:6; days 1:10-12
- Chaperones must be trained in their responsibilities
- Chaperones must know and enforce school rules
- Background checks may be required of chaperones
- Students must be informed of behavior guidelines and consequences for misbehaving before leaving
- Provisions for disciplining students must be made in advance, including procedures for returning students ahead of time

#### TRANSPORTATION:

- School vehicles are covered by insurance and are preferred method
- Private carrier—Private insurance is primary
  1. Personal vehicles-owner driver
  2. Vendor provided via contract or ticket
- Public Transit—Transit insurance is primary

#### MEALS/LODGING:

- Meals are part of the total program, or student responsibility
- Meals are group meals
- Meal allowance may be given to students, according to district procedures on a per diem basis
- Lodging—plan in place and communicated before leaving
- No males and females in the same room
- Visitor guidelines—recommend general public meeting area
- Lodging in home stays
  1. Avoid, if possible
  2. Background check with host school or institution is recommended, if home stays used
  3. Emergency plan available for students, in case of need/unsafe conditions
  4. Behavior expectations shared with home stay hosts

### PARENT MEETINGS:

It is recommended the following topics be covered at the parent meeting. Other topics may be added, as needed, to fit the scope and responsibilities of the travel. These meetings are an excellent way to clarify responsibility of each party involved.

### ORIENTATION MEETING:

1. Goals and objectives of travel program.
2. The standard of conduct established for the program.
3. Behavior plan outlining the responsibilities pupils assume by participating in program.
4. Basic costs for travel, meals, lodging/accommodations, and other fees such as entrance fees, miscellaneous spending.
5. Travel arrangements, including overnight accommodations, as needed.
6. Arrangements for coping with illness, accidents or other emergencies.
7. Need for special equipment or clothing.
8. Deadlines for payments, refunds, etc.
9. Individual questions answered and shared with group, as appropriate.

### FINAL PRE-TRIP MEETING:

1. Final travel arrangements, including exact itinerary, for entire trip.
2. Confirmation of emergency numbers and contact information.
3. Finalization for any fiscal issues/payments, etc.
4. Collection of parent permission forms.
5. Individual questions answered and shared with group, as appropriate.

**TRIP PROPOSAL**  
(School Sponsored)

If the trip is part of a regular academic/activity program

-or-

The trip is an enhancement to the regular academic/activity program

-and-

The sponsor is a district employee working within the scope of their duties

then

The trip is a **school-sponsored** activity/event

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If the trip is a school-sponsored activity/event

Is the trip **required** or **optional**?

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If the trip is a school-sponsored activity/event

-and-

The trip is part of a regular class

then

The trip is probably **district sponsored**.

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If the trip is a school-sponsored activity/event

-and-

The trip is not a part of a regular class, but a grade-level activity, club, or athletic activity/event

then

The trip is probably and **ASB-sponsored** activity/event

**TRIP PROPOSAL**  
(Private Trip)

If the trip is not part of a regular academic/activity program

-or-

The trip is not an enhancement to the regular academic/activity program

then

The trip is **not a school-sponsored** activity/event but is a

**PRIVATE TRIP**

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**Guidelines to follow**

- No school involvement
- No use of school equipment, unless rented, (computers, copiers, etc)
- No fund raising, unless facilities are rented
- No use of class time to advertise or organize the trip/activity
- Use of public bulletin boards is permitted to advertise trip
- No use of school district name when in promoting trip/activity
- Recommend stating the trip/activity is not district-sponsored
- No use of school newspaper/media to advertise trip, unless a paid advertisement, by the sponsoring group.