



Re: Activity and Field Trips

Introduction

The school district's insurance company (The Trust) has developed this Technical Information Bulletin to assist school districts in planning and conducting safe, successful activity and field trips. A summary of recommended steps for activity selection and trip planning, in checklist form, is included as **Exhibit 1**. Additionally, trips should always be planned and approved in conformity with written district policy.¹

Risk Analysis

Potential participant risks are a primary consideration when evaluating any activity or field trip. The Activity Trip Exposure Analysis Checklist (**Exhibit 2**) helps address transportation issues, trip environment, facilities/accommodations, supervision issues, and overall risk mitigation. The individual completing the form should think broadly, evaluating incidents or events that could plausibly result in potential injury or property damage. (Consulting with a district risk manager or a Trust loss control consultant can be a helpful part of this process.) Then, a determination must be made as to whether the identified risks can be managed satisfactorily.

Approval

The school principal should approve any activity or field trip destination. The approval form is included as **Exhibit 3**. **Out of state trips require school board approval and must be submitted to the district office no later than the 1st of each month.**

In considering trip approval, the principal should review the Activity Trip Exposure Analysis Checklist (**Exhibit 2**) and the Activity Trip Request Form (**Exhibit 3**). In doing so, the principal may wish to give special consideration to the following questions:

1. Does the activity trip provide students with an opportunity to learn that is not available in the classroom? (If not, any risks associated with the activity become less defensible.)
 2. Can any safety/risk issues associated with the activity be clearly and comprehensively communicated to parents?
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3. Can these issues be satisfactorily managed by the trip leaders and supervisors?

While the principal's approval is pending, any additional approvals should also be sought. For example, out-of-state and out-of-country trips typically must be approved by the district governing board. (For out-of-country trips, international insurance should be arranged through the Trust. Contact a member services coordinator for additional information.)

Planning the Trip

Activity and field trip safety and learning goals are best met when the trip leaders develop a plan to avoid or adequately manage potential trip hazards and risks. As part of this process, the trip leaders may need to visit the activity site in advance. The trip plan may also need to be updated and modified if/as circumstances change.

Transportation planning

Transportation hazards account for a large portion of trip-related district claims and lawsuits. Trip leaders should consult the transportation department or Trust loss control personnel about safe and proper travel procedures, including route planning, multi-vehicle travel, layover/parking procedures, etc.

It is strongly recommended that only district-owned and -operated vehicles be used for transportation to and from the activity site to ensure that vehicles are insured, adequately maintained, and driven by qualified and appropriately licensed personnel.

Finally, students should not be permitted to leave the group during the trip nor return from the activity trip separately from other students unless the parent or guardian has made prior arrangements with the trip leaders and other appropriate school personnel.

Planning for supervision

Per Board Policy 5-212 A , "All trips of Student clubs, groups, and teams must have 1 chaperone for every 12 students unless otherwise authorized by the site Principal. COED groups of traveling students attending an overnight trip must have 1 biological male and 1 biological female chaperone. Biological Male and biological female students may not share a room. All efforts shall be made to secure lodging at institutions that accept direct bill or a purchase order. Trip leaders must ensure that the following guidelines are adhered to during the entire period of the activity trip:

1. Trip leaders and volunteers must be physically present and in line of sight to students to monitor behavior and provide needed assistance.
2. Volunteers should be instructed on how to supervise and should assist with supervision only along with and under the direction of school personnel.
3. A teacher must designate another school employee to supervise students during the teacher's absence.

4. Teachers should never leave students completely unsupervised.
5. Students should be encouraged to “find a buddy”/pair up so that they can serve as a supplemental source of information on participant whereabouts and safety during the course of the activity.
6. The activity should include periodic accounting for all students, staff, and volunteers at various junctures.

Appropriate numbers. The trip leaders must arrange for an adequate number of certificated and non-certificated personnel or volunteers to act or assist as supervisors on the trip. In deciding how many supervisors are needed, consider the age of students, the size of the group, and any student special needs.² Consider, too, whether the activity or field trip destination has established mandatory ratios of adults to students. Finally, consider the type of activity, as more adventurous, challenging, or specialized activities generally require closer supervision.³

Appropriate individuals. Next, consider the type of individual who will serve as an effective trip supervisor. An appropriate person to accompany students on an activity trip should:

- be a certificated or non-certificated employee or approved volunteer of the district;⁴
- be known to trip leaders and other appropriate school personnel;
- be able to exercise sound judgment in dealing with children;
- be fully committed to volunteering and have no conflicting family or work obligations (they should never bring guests or family members); and
- possess the necessary skill set for trips requiring skills or expertise.

Information for supervisors. To increase prospects for a safe activity trip, be sure that all supervisory personnel are provided with the following information before the trip begins:

- purpose of the activity trip;
- appropriate supervision practices;
- any times/locations where heightened attention and/or closer supervision will be required;
- the names of students to be supervised;
- information on how to manage behavior problems;

² Younger students, larger groups, and a greater number of students with special needs will tend to necessitate higher supervisor-to-student ratios.

³ While there is no universally accepted standard for an appropriate supervisor-to-student ratio, educational and youth organizations commonly report ratios from 1:5 for younger students or those requiring closer supervision; to 1:8 or 1:10 for somewhat older students or those requiring a medium level of supervision; to 1:12 or 1:15 or higher for more mature students needing the least amount of supervision.

⁴ If volunteers are to be used, they should be responsible adults who are at least 18 years old and who have met any fingerprint/clearance requirements indicated in district policy and state law. See [A.R.S. Section 15-512](#).

- assigned students' medical, dietary, or other special needs;
- snack and meal plans;
- appropriate dress and gear for the trip; and
- the cell phone numbers of other supervisory personnel and trip leaders.

Potential danger points must also be discussed in advance with the group of supervisors. Should an emergency occur during the trip, trip leaders must assume control of the situation and be trained and equipped to notify emergency responders and district personnel quickly, while also effectively coordinating supervisors.

Recordkeeping

Recordkeeping is an important part of any activity trip. All forms, permission slips, and reports should be maintained at the school office for at least three years, both as a record of the trip and to provide other trip leaders with valuable information for their planning purposes. Additionally, transportation forms, including filed trip slips that include vehicle odometer readings, should be kept for five years. Activity mileage should be reported to the Arizona Department of Education during the appropriate reporting periods.

Finally, specific records should be produced and maintained for each activity trip a school undertakes. The minimum recommended records include the following:

- Activity Trip Exposure Analysis Checklist (**Exhibit 2**);
- Activity Trip Request Form (**Exhibit 3**); and
- Activity Trip Permission Form (**Exhibit 4**), which notifies parents/guardians of the purpose of the trip, any special requirements associated with the trip, any unusual risks related to the trip, and the alternative activity that will be made available for eligible students who do not participate in the trip. The form also allows parents/guardians to authorize the administration of prescribed medication per the student's physician's guidelines.

Conclusion

Activity and field trips can be an invaluable part of the educational experience for students of all ages. By following the guidelines in this publication, schools can conduct successful trips that are rewarding, educational, and safe.

Exhibit 1. Activity Trip Planning Steps

Activity trips should be planned per district policy and the guidelines presented in the preceding pages. The items listed below represent some of the major steps involved in planning a safe, successful trip:

Completed? (Y/N)	Timeline/Action Items	Comments
	<p>Ongoing</p> <p>The district should publish a validated schedule for trip activities and destinations.</p>	
	<p>More than 8 weeks in advance</p> <p>The trip leader should consult the validated activity schedule, review the educational value and age appropriateness of various validated activities, and then provisionally select an activity trip location.</p>	
	<p>8 weeks in advance</p> <p>Using the Activity Trip Exposure Analysis Checklist (Exhibit 2), the trip leader should conduct a risk analysis of conditions that must be managed on the trip or could render the trip unreasonably risky.</p>	
	<p>8 weeks in advance</p> <p>The trip leader should prepare the Activity Trip Request Form (Exhibit 3) and submit it to the school principal for approval in conjunction with the Activity Trip Exposure Analysis Checklist (Exhibit 2). Any concerns about the trip should be discussed at this time.</p>	
	<p>8 weeks in advance</p> <p>The trip leader and principal should secure any additional permissions required. For example, out-of-state and out-of-country trips typically must be approved by the district governing board. (For out-of-country trips, international</p>	

Exhibit 1

Completed? (Y/N)	Timeline/Action Items	Comments
	insurance should be arranged through the Arizona School Risk Retention Trust, Inc.)	
	<p>8 weeks in advance</p> <p>Once the necessary permissions have been secured, the trip leader should arrange an appropriate alternative learning experience for students who will not participate in the activity trip.</p>	
	<p>8 weeks in advance</p> <p>The district transportation director should be informed of the approved activity trip to make any necessary arrangements for vehicles, begin monitoring potential route conditions, etc.</p>	
	<p>Between 8 weeks and 2 weeks in advance</p> <p>Adequate numbers of qualified/prepared supervisors should be contacted, and their availability and commitment should be confirmed before the trip.</p>	
	<p>Between 8 weeks and 2 weeks in advance</p> <p>The trip leader should determine whether the owners/ managers of the destination require evidence of liability insurance protection. If so, such evidence should be provided before the trip.</p>	
	<p>Between 8 weeks and 2 weeks in advance</p> <p>The means of transportation specified in the Activity Trip Request Form (Exhibit 3) should be arranged or confirmed.</p>	
	<p>Between 8 weeks and 2 weeks in advance</p> <p>If district transportation other than a bus is to be used, the trip leader should consult and follow the recommendations of transportation-related Trust publications (e.g., fifteen-passenger van safety presentations, TIB No. 36: Fifteen-</p>	

Exhibit 1

Completed? (Y/N)	Timeline/Action Items	Comments
	<p>passenger Van Rollover, and White Fleet Program Guidelines Handbook.)</p>	
	<p>2 weeks in advance</p> <p>The trip leader should prepare and distribute the Activity Trip Permission Form (Exhibit 4) to provide students and parents/guardians with the necessary information to allow informed parental consent.</p>	
	<p>1 week in advance</p> <p>The destination route should be planned, reviewed, and communicated to all drivers. If practicable, the route should be planned to avoid risky or unsafe situations. If not possible, such situations should be discussed with all drivers. Finally, contingent plans should be established and communicated if problems are encountered on the chosen route.</p>	
	<p>1 week in advance</p> <p>Parking accommodations should be arranged before the trip, and contingent plans should be established if the primary parking is unavailable.</p>	
	<p>Between 1 week in advance and the day of</p> <p>Pre-trip vehicle inspections should be conducted on any vehicles for the activity trip. (For an inspection checklist, see the White Fleet Program Guidelines Handbook on the Trust website if using a vehicle other than a school bus.)</p>	
	<p>Day of the event</p> <p>On the day of departure, check all travel routes to determine if adverse road or weather conditions exist.</p>	

Exhibit 1

Completed? (Y/N)	Timeline/Action Items	Comments
	Day of the event Well before the official start time, provide supervisory personnel with information and equipment they will need for the event.	

Exhibit 2. Activity Trip Exposure Analysis Checklist

(to be completed by the trip leaders and submitted to the school principal)

The trip leaders should answer the following questions when planning the activity or field trip. If specific risks are identified while answering checklist questions, plans for managing and mitigating these risks should be documented before seeking trip approval.

The checklist is only a guideline for considering significant risks and exposures. Trip leaders who complete the checklist should evaluate all likely risks that may cause injury or property damage. Consulting with a district risk manager or a Trust loss control consultant may be helpful. Trip leaders should also be satisfied that any risks inherent in the activity can be managed to protect people and property.

While any item below may be discussed in more detail between trip leaders and the school principal, those identified with an asterisk (*) may be particularly worthy of additional conversation.

Transportation

_____ Do you know how students will be transported to/from the activity site? Did you discuss/validate transportation plans with district transportation personnel?*

_____ Will stops be necessary to/from the activity site? If so, can they be planned and managed to maintain student control and safety?*

_____ Is adequate space available at the site for safe vehicle loading, unloading, parking, and turn-around?*

Environment

_____ Does the overall trip setting—urban vs. rural, indoors vs. outdoors, open vs. confined, uncrowded vs. densely populated, etc.—pose any particular risks or concerns?*

_____ Does the trip require special clothing, such as shoes, jackets, gloves, and eye protection, or special equipment, such as a compass, notebook computer, generator, cellular or satellite phone, or global positioning system?

_____ Are there potential risks involving any of the following: water, hiking, climbing, falling rocks, going underground, or traveling on unmarked or unmaintained trails or pathways?*

_____ Are there risks associated with direct contact with plants (e.g., thorns or allergic reactions) or animals (e.g., bites or scratches)? If so, can adequate precautions be taken to protect against these things?

_____ Are there seasonal weather concerns, such as possible temperature extremes or severe or unusual weather systems (e.g., high winds, heavy snows, monsoon storms, sun, heat, cold exposure)?*

Facilities/Accommodations

- _____ Are first aid services available at the trip location in the event of an injury or illness? If not, can other reasonable accommodations be made?*
- _____ Are food and water available at the trip location? If not, will students bring their own food and water? Are facilities available to safely store food and water?
- _____ Can arrangements be made for an emergency or medical evacuation if an incident were to occur?*
- _____ Are adequate restrooms and changing facilities available at the location?
- _____ If required, are overnight accommodations available?

Supervision

- _____ Has a supervisor-to-student ratio been established for the trip?*
- _____ Are any particular skills required of persons supervising trip participants?*
- _____ Considering both the supervisor-to-student ratio and supervisor skill requirements, are there sufficient teachers, school staff, and volunteers available to supervise the activity or field trip?*
- _____ Will it be possible to adequately supervise students at critical junctures, such as when a larger group splits into smaller groups, when groups are idle, and/or during any riskier moments of the activity?*

Other Considerations

- _____ Are there any other special considerations that might add to the risks associated with the trip/activity—for example, air travel, motorized activities, outdoor educational sessions, swimming, hiking, climbing, a trip attendee with a special health-related need or consideration (an unusual allergy, for example, or a pregnancy), etc.?*

Managing Potential Risks, Hazards

Based on your consideration of the preceding questions, identify the potential hazards associated with this activity trip:

Exhibit 2

How will these hazards be addressed or otherwise mitigated?

Trip Leader Printed Name _____

Trip Leader Signature _____ Date _____

I have reviewed all required documentation, and verified that there are student permission slips, that there is a plan for appropriate supervision of students, and I approve of this trip.

School Principal Printed Name _____

School Principala Signature _____ Date _____

Exhibit 3. CRUHSD Activity Trip Request Form

(to be completed by the trip leader and submitted to the school principal)

Date submitted _____

Name of school _____

Person requesting permission for the trip

Name _____ Position/title _____

Trip leader(s)

Name _____ Position/title _____

Name _____ Position/title _____

School district emergency contact

Name _____ Position/title _____

Trip destination (complete address, including city and state)

Name _____

Address _____

Contact person at the destination

Name _____ Position/title _____

Contact information _____

Participant information

Number of students participating _____

Age/grade level of students participating _____

Number of certificated staff supervisors _____

Number of non-certificated staff supervisors _____

Number of volunteer supplemental supervisors _____

Total number of supervisors (certificated + non-certificated + volunteers) _____

Supervisor-to-student ratio _____

If supervisor-to-student ratio will vary by student age group, please describe below

Exhibit 3

Are any special qualifications for supervisors needed? Yes or No

If yes, describe the qualifications:

Departure details

Date _____ Time _____ AM/PM

Departure point/location(s):

Return details

Date _____ Time _____ AM/PM

Return point/location(s):

Means of transportation (include # and type of district vehicles, if applicable)

What is the purpose of the trip?

What activities are planned during the trip (describe briefly below; attach detailed itinerary with schedule, available and planned activities, and website link[s]):

Are brochures/site information attached? Yes or No

What alternative activity/activities will be available to non-participants?

Will the trip involve any unusual risks to participants (e.g., swimming, boats, water, remote locations/hiking, outdoor education, animals, motorized activities, etc.)? If so, how will those risks be managed?

Does the site require evidence of liability insurance protection? Yes or No

Estimated total cost of activity trip Estimated cost per student participant

\$ _____

\$ _____

Principal approval

Name _____

Signature _____

Date _____

Governing board approval, if needed

Name _____

Signature _____

Date _____

Exhibit 4. CRUHSD Activity Trip Permission Form

Activity Trip Information

To the parent or guardian of students in the _____ (grade, class, or group) at _____ (school), _____ (name of trip leader) is planning an activity trip to _____ (location, trip sponsor, or event) on _____ (date).

The time and location of departure are as follows: _____

The date, time, and location of return are as follows:

The purpose of the trip is _____

Specific trip activities will include _____

(An itinerary and other event/venue information are attached to this form for your review.)

There will be a cost to the student of \$_____, which must be paid by _____ (date).

If paid by check, the check should be made payable to _____.

Eating arrangements will be as follows: _____

(e.g., students should bring their own food, purchase food on site, or other options)

The student will need to bring ___ ounces of drinking water in non-breakable containers.

Transportation arrangements will be as follows:

PARENT/GUARDIAN: PLEASE RETURN THIS COMPLETED SHEET TO SCHOOL

Exhibit 4

Special clothing/gear required for this trip will include:

The nature/location of the activity requires that each student be able to accomplish the following physical tasks:

The nature/location of this activity includes exposure to: ___ animals, ___ plants,
___ water, ___ stairs or inclined paths, ___ nature trails, ___ unpredictable weather,
___ other: _____

The school's emergency contact for this trip is _____,
who can be reached at _____.

Additional trip information: _____

Alternative Learning Experience

For those students not participating in the activity trip, an alternative learning experience has been arranged under the direction of _____. Students participating in the alternative learning experience will (description of events/activities):

PARENT/GUARDIAN: PLEASE RETURN THIS COMPLETED SHEET TO SCHOOL

Exhibit 4

Activity Trip Permission and Medical Release

My signature below indicates that I have read the information contained in this document and any attachments.

I approve of _____ participating in the _____
(name of student) (grade, class, or group)
activity trip described on the separate pages above.

I do not approve of _____ participating in the _____
(name of student) (grade, class, or group)
activity trip described on the separate pages above, and instead direct that he/she participates in the alternative learning experience.

I understand that the district's liability coverage only applies to injury if negligence is proved against the district and if the terms and conditions of the contractual liability coverage provided in favor of the district have been met. In all other circumstances, the student should seek coverage from his/her own health care insurer and/or the negligent third party responsible for causing the injury.

In case of an accident or serious illness, I request that the school/trip sponsor contact me. If I cannot be reached, I hereby authorize the school/trip sponsor to call the physician or hospital indicated below and follow his/her/its instructions. If it is impossible to contact this physician/hospital, the school/trip sponsor may make whatever medical arrangements are necessary. If there are any special instructions regarding the medical treatment of my child, including any information regarding allergies or drug reactions, I have included the information below on the "Special instructions" line and/or in the attached medication administration consent form.

I have legal custody or control of my child and grant permission for any emergency treatment and hospital services that may be rendered to said child under the general or specific direction of:

Name of doctor or hospital emergency department:

Phone number of doctor or hospital: (_____) _____ - _____

Special instructions: _____

Parent/legal guardian name: _____
(please print)

Phone number: (_____) _____ - _____

Home address: _____

Signature of parent/legal guardian: _____

Date: _____

PARENT/GUARDIAN: PLEASE RETURN THIS COMPLETED SHEET TO SCHOOL

Administration of Medication Form

Please initial the option below that meets the needs for medication administration for your child.

_____ I am not requesting that school personnel assist my child, _____, with administration of prescribed or over-the-counter medication while on this activity trip.

OR

_____ I request that designated school personnel assist my child, _____, by administering him/her the prescribed or over-the-counter medication he/she needs while on this activity trip, as outlined in the attached Physician's Statement.

I hereby give permission for the exchange of information regarding my child's prescribed medication.

Parent/Guardian Permission

Signature of Parent/Guardian Printed Name Date

Signature of Parent/Guardian Printed Name Date