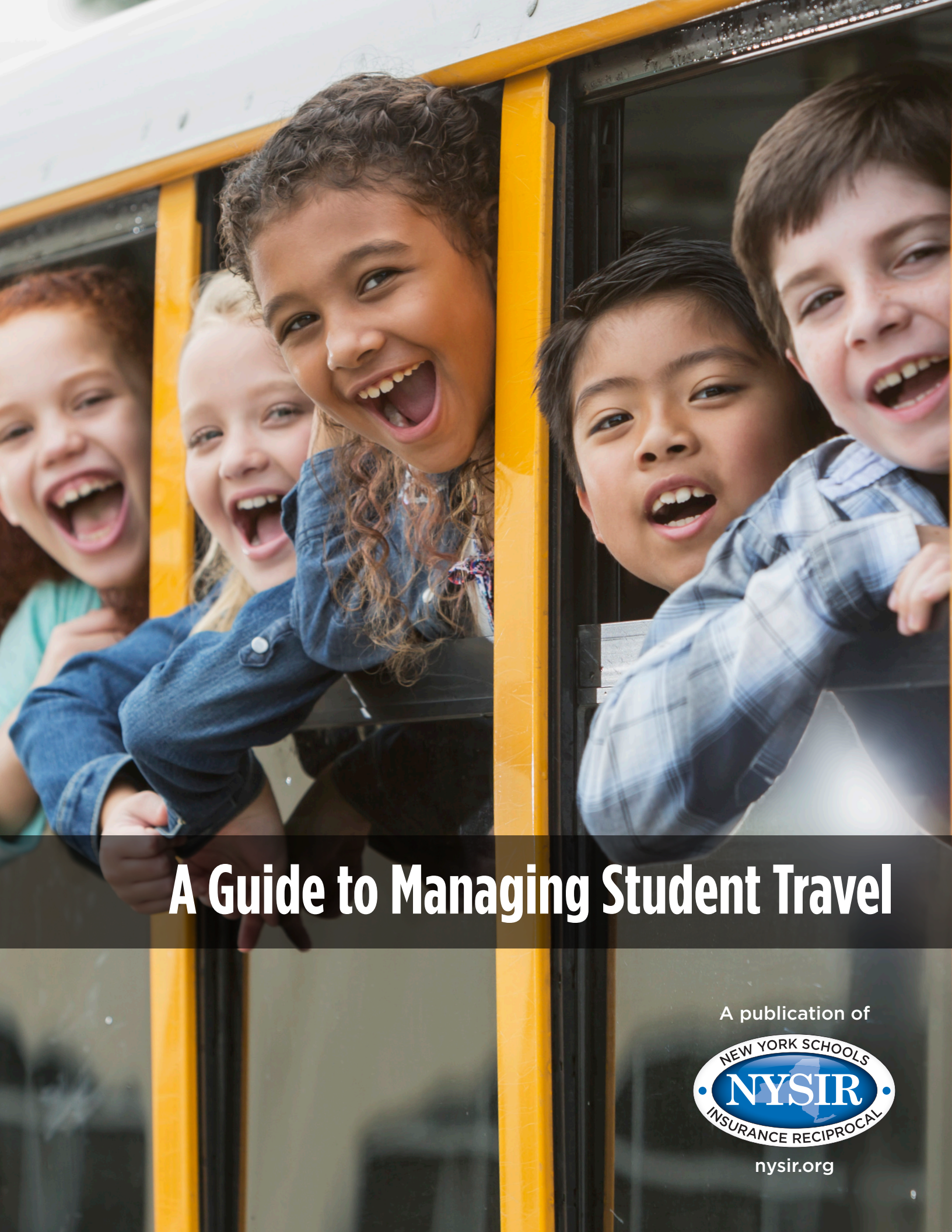




A Guide to Managing Student Travel

A publication of



nysir.org

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nysir.org

Fourth Edition. Revised June 2021.

This NYSIR resource – *A Guide to Managing Student Travel* – was compiled to assist Subscribers in planning for and managing Student Travel. It does not address every situation, exposure, condition or hazard which may occur. Please contact with Travel Professionals when planning overnight and international trips to get expert advice and planning. References to insurance coverage is for illustrative purposes. Please contact your insurance representative or NYSIR Underwriting at 1-800-476-9747 ext. 1461 with specific coverage questions.

Questions concerning this publication should be directed to Brett Carruthers, Director of Risk Management at 716-870-8516 or bcarruthers@nysir.org.

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June 2021

Student travel provides wonderful opportunities to inspire learning and to provide unique experiences that go beyond the classroom. History comes to life when students visit famous sites which they have read about in their studies. A trip to the state or the nation's capital where students can observe how laws are made gives new depth to civic lessons. Overseas travel immerses students into foreign cultures, providing valuable understanding of the global community. To remain proactive in this area, NYSIR Risk Management presents the fourth edition of this guide to reflect additional means for a successful excursion.

I am pleased to introduce this handbook for school administrators, educators, parent liaisons, and all of those involved not only in the decision-making process, but also the organization of field trips for our students. While the initial steps are to determine the educational objectives and relevancy of the trip and granting approval; there are many subsequent elements that ensure a safe and successful trip. This handbook includes a discussion of NYSIR's loss experience as related to field trips, and a thorough review of ways to manage risk to ensure the safety, security and welfare of student travelers and their chaperones. Also included are support forms and documents related to field trip organization and safety.

Thank you to Brett Carruthers, NYSIR's Director of Risk Management, for his coordination of this carefully researched guide, and Michael Drance, Joyce Moore, Joe Rychlik and Connie Wallis from the Risk Management Team for their insights and expertise in revising this edition of *A Guide to Managing Student Travel*. We trust this guide will become an essential part of your student travel planning.

Please share this document with your administrative team and all others involved in coordinating and planning student travel. This will aid in ensuring all trips are planned and following the same procedures.

Sincerely,

A handwritten signature in black ink that reads "Deborah Heppes". The signature is written in a cursive, flowing style.

Deborah Heppes
President, NYSIR Board of Governors



A GUIDE TO MANAGING STUDENT TRAVEL

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The Risks of School Travel



The Risks of School Travel

Managing school-sponsored field trips *has always been a challenge for school districts.*

Recent travel restrictions have increased these challenges. There is nothing more anxiety-producing than having students, chaperones and faculty traveling away from the safety of the school environment, whether they are going to the local zoo, across the state or to another country. While student travel has moderated, many school groups are still venturing beyond the traditional one-day bus excursions to local historical or geographic attractions. Trips involving overnight stays, air travel, journeys going across the country and internationally, are still common.

This handbook was written for our subscribers to help them with the challenging task of selecting, planning and managing student travel. It includes information about several aspects of student travel, including:

- Insurance Coverages
- Risk Control Recommendations
- Emergency Management Planning
- Terrorism Threats
- Foreign Travel
- Chaperones

Sample forms and documents are also provided. See pages 20 – 36.

A CHANGING LANDSCAPE

Not surprisingly, the exposures experienced by public schools reflect our society. Whether on the national or state level, external exposures shape and ultimately affect the risk management programs implemented and managed by NYSIR subscribers. Exposures dramatically changed on September 11, 2001 and as a result of the COVID-19 Pandemic. There have been increased security measures

taken by federal, state and local officials; actions taken by the owners of popular tourist attractions and venues; illness protection guidelines and protocols implemented. These factors have raised the need for well-planned and designed field trip organization and management. These events have increased the scrutiny of student travel by boards of education, administrators and parents/guardians, and have raised questions about the appropriateness of individual trips and the overall safety and security of students, staff and volunteers. Additionally, subscribers have raised many poignant questions about travel during elevated terrorist alerts, foreign and domestic airline travel, and whether sports camps are still appropriate.

NYSIR'S LOSS EXPERIENCE

Most of the student travel claims that have been initiated against subscribers have been related to assaults. The majority of these are student-on-student claims from students who were injured on school trips or at sports camps. Given the nature of the claims, these are generally

low frequency, high severity exposures. One claim against a subscriber involved an alleged sexual assault by a volunteer chaperone against a student.

Student travel often involves athletics, sports and recreational activities. Injuries resulting from these activities occur infrequently, and as a rule, do not rise to the level of claims or litigation. However, injuries and illegal or unacceptable behavior on trips can lead to other serious problems for districts and BOCES, resulting in damaged community image and reputation. Typical allegations in these claims include the failure to supervise students, not enforcing rules of conduct, and failing to adequately warn of hazards.

REPUTATION RISK

Reputation risk is the potential negative impact on a district or BOCES due

to a serious event. These events may taint the opinion of the public toward the district or BOCES. When a district's reputation is negatively affected, budgets may not pass; capital projects may be postponed; programs may be canceled and relationships with staff, students and taxpayers are damaged.

There have been several well-publicized incidents covered by both local and national media. These incidents concerned illegal or unacceptable behavior occurring during student travel, predominantly during overnight trips. In addition to causing financial loss resulting from claims and litigation, these incidents force administrators and board of education members to deal with the media, address public relations issues and answer questions from staff, parents, students and others. This diverts valuable resources and time to manage unfavorable publicity.

Insurance Coverage

NYSIR has not decreased its coverage for student travel. *A general overview of NYSIR's coverage by policy follows. Subscribers should read the applicable policy, or contact their broker, insurance representative or the NYSIR underwriting staff with specific coverage questions or for detailed advice.*

PROPERTY

The NYSIR property policy provides coverage for property damage to buildings and contents subject to the policy deductible. Except for property that is temporarily away from a covered location

(and subject to a sub limit of \$100,000), coverage for contents (such as equipment, laptops, and musical instruments) only extends for 1,000 feet from a covered location. The best way to properly cover property that "travels" away from a school is with a floater (inland marine) policy

that covers property off-premises. Floater policies provide coverage on a direct risk of loss basis, subject to a smaller deductible – often \$250 or \$500.

Personal Property Coverage: A standard Homeowner's Insurance Policy will cover loss to an insured's personal property while away from the premises, however, some insurers exclude coverage for off-premises theft. If this endorsement is on the policy, a loss caused by theft will be excluded, but the policy will respond to losses caused by other perils, such as fire and water damage.

COMMERCIAL GENERAL LIABILITY (CGL)

The NYSIR CGL policy provides coverage on a worldwide basis and does not contain a specific exclusion for student travel. Employees and bona fide volunteers are considered insureds for covered accidents that arise as a result of their employment, service as a chaperone or volunteer activities. This includes coverage for claims alleging improper supervision of students. There is no insurance coverage for any person who is a named offender in sexual misconduct allegations.

AUTOMOBILE

The NYSIR Automobile Liability policy provides coverage for district-approved use of vehicles during field trips and other types of student travel in the following ways:

- Primary insurance for the district and persons operating district-owned vehicles with permission.
- Excess insurance for employees and volunteers who operate their own

vehicles may be provided by the NYSIR Automobile Policy when the use of non-district-owned vehicles is allowed.

- Excess insurance for rented vehicles.

WORKERS' COMPENSATION

Workers' Compensation coverage extends to employees for compensable accidents whether on or off-premises. NYSIR does not provide Workers' Compensation insurance for its members. Contact your Workers' Compensation insurer or third-party administrator for more detailed information.

STUDENT ACCIDENT

Generally, Student Accident Insurance covers all school sponsored and supervised activities. However, plans offer options which enhance the coverage, including interscholastic athletics and summer school activities. Since NYSIR does not provide Student Accident Insurance, subscribers should contact their student accident insurer for information concerning this coverage.

UNAPPROVED TRAVEL

Usually, NYSIR's policies do not cover activities that are not part of a district's official or approved activities, programs or operations. The policy does not afford coverage to a person (such as an employee) who is sued because of his or her involvement in an activity that is not part of the employee's duties or responsibilities for the district/BOCES. Therefore, a teacher who arranges a field trip that is not approved by the district/BOCES will not be entitled to coverage through the NYSIR program.

Unapproved travel for students, trips that have not been submitted to the board of education or administration for formal approval, but that the district is aware of and supports by allowing:

- Meetings to be held on school property
- The use of office supplies and letterhead
- The use of duplication services

could possibly result in an uninsured situation for the teachers or staff involved. Additionally, there is a chance that indemnification under the New York State Education Law may not apply.

Accordingly, NYSIR recommends that all travel should be evaluated and reviewed, and the district/BOCES's policies on student travel followed. In some cases, it is

better for trips to be brought into the district as sponsored activities so that applicable policies and procedures can be addressed and followed. Do not implicate the school district by becoming even partially involved with a non-school-sponsored trip.

ACTIVITIES NOT COVERED

The NYSIR CGL policy provides broad coverage for school districts. However, not every exposure is covered. Examples include district owned aircraft; certain watercraft and unmanned aircraft which are not endorsed on the CGL policy. Subscribers should consult their insurance representative or NYSIR Underwriting for coverage information or interpretations.

Evaluating Student Travel

EDUCATIONAL FIELD TRIPS

Having consistent policies and procedures for field trips is essential. Districts/

BOCES should require approval from a building principal, central office administrator and the board of education. While criteria for approval differs, typically requirements include:

- Relationship to curriculum or grade level
- Relationship to a specific course
- Emanation from a school-sponsored club

HIGH-RISK ACTIVITIES

Periodically, subscribers arrange trips that involve high-risk activities. Such activities as rafting, mountain hiking, rock climbing,

cave exploration, and skiing involve unusual hazards that require special attention and planning. Some other considerations include:

- All required or recommended license and certification requirements for guides, outfitters and instructors should be reviewed and verified before the trip.
- A detailed description of the activities must be in the parental/guardian permission slip. This gives parents and guardians the opportunity to evaluate their child's skills, physical condition and interest beforehand and determine if the child should participate.
- A definitive determination of the responsibilities for those supervising the students during these activities.

- All participants, chaperones and staff must wear personal protective equipment as recommended or required.
- The permission slip should have an “opt-out” provision for individual

students in a specific activity, such as use of a rock-climbing wall at a recreation center. An alternative activity should be provided and included in the permission slip for those choosing to “opt-out”.

Risk Control

Subscribers can prevent accidents from occurring *during student travel by implementing risk control measures before, during and after school trips.*

EMERGENCY MANAGEMENT PLANNING

Although it is a pre-trip risk control measure, we believe emergency management planning should be addressed separately. Under Project SAVE, NYSIR subscribers are required to establish and maintain an Emergency Management Plan (EMP), crafted to respond to different emergencies and situations.

NYSIR recommends adopting the plan to address emergencies that can occur off campus and when students are traveling. This can be part of multi-hazard response planning and may be accomplished by listing the types of trips taken in the past and those approved for the upcoming school year. Central office administrators should make certain that the trip leader, other district staff and volunteers on the trip are thoroughly familiar with, and carry a copy of the EMP.

An EMP for student travel should address emergencies that may arise from:

- Student Accidents or Illnesses
- Motor Vehicle Accidents or Breakdowns
- Fires or Other Hotel Emergencies
- Civil Unrest
- Epidemics or Pandemics
- Weather Emergencies (such as Floods, Hurricanes or Ice Storms)
- Bomb Threats
- Criminal Acts – Student/Staff Arrests
- Utility Failures

Hotel or sports camp management should have an EMP for their facilities. Trip leaders should check the evacuation plans when they arrive. Review the evacuation routes that are posted in hotel rooms with students, staff and volunteers, as well as the building's alarm system and procedures. Select a meeting spot away from the hotel and communicate this to all participants. Carry a copy of the attendance list to ensure that all students, chaperones, volunteers and staff are accounted for. While most weather events arise after advance warning, hotel or camp management should be prepared to

respond to hurricanes, severe weather or floods. Checking with the local weather service before leaving is prudent, especially if travel is during a severe weather season.

Ask coach bus contractors to explain or provide a copy of their emergency plans in case of an accident or mechanical breakdown.

If students are stranded, consider the following recommendations:

- Contact local law enforcement for assistance and to direct the group to suitable shelter.
- Contact district administration and parents/guardians.
- Be prepared to assist students with medical conditions or special needs.

Establishing a Communications Center:

In the event of an emergency during student travel, school administrators in the district should establish a communications center, preferably using the site designated in the district-wide EMP. ▪ Parents and guardians can be directed to the site to obtain information and meet with school officials.

TRANSPORTATION ISSUES

Transportation by Parents, Guardians and Others

In some instances, a district/BOCES may find that for school-sponsored events, having parents or guardians transport students in private cars not owned by the district is warranted. In these instances, NYSIR does not provide primary automobile insurance coverage for non-district-owned vehicles. In New York State, liability insurance follows the vehicle. The drivers must carry adequate personal automobile insurance since they may be held personally liable for injuries to passengers and others that are a result of their negligence.

Before allowing the use of non-district-owned vehicles, administrators should determine whether there is a district policy that addresses this practice. In some districts, this is prohibited. If this type of

student transportation is permitted, then the policy must be followed. The policy must be reviewed with drivers in a pre-trip meeting. Check with the district's transportation supervisor or school attorney to see what is required in order to allow parents or guardians to drive students in their vehicles.

The following recommendations will help reduce transportation-related accidents:

- Obtain signed permission slips from the parents of all students stating that they understand and authorize their child to be transported by private vehicle.
- Consider obtaining a written memorandum of understanding of their responsibility and liability from the volunteer drivers or teachers, when applicable.
- Obtain a copy of the driver's license, DMV record and insurance ID card from all drivers.
- Those with poor driving records should not be authorized to transport students.

- In addition to the driver, we recommend having at least one other teacher or chaperone in each vehicle.
- Vehicles should have a basic safety inspection prior to the trip. Confirm that the registration and inspection certificate are current. The transportation supervisor may want to look over the vehicle for safety hazards before the trip.
- For long trips, time parameters should be established to ensure the driver remains alert.
- Any accidents must be reported to the district regardless of the severity.
- A minimum age should be established for volunteer drivers.
- The number of passengers in any vehicle cannot exceed the number of appropriate safety restraints, as established by the manufacturer of the vehicle.
- Obtain certificates of insurance with additional insured status for the district/BOCES and proof of workers' compensation coverage. Submit these forms to the NYSIR Risk Transfer Team for review. (Sample Insurance Specifications are in the Sample Forms and Documents section of this manual).
- Verify the identity of the driver by asking to see a driver's license. This will ensure that only those drivers that you have already checked through License Monitor or have been certified by the Transportation Contractor are the ones who show up to drive on the trip.
- Coordinate transportation arrangements in one centralized location (Transportation Office or Central Administration). Principals and teachers are not familiar with transportation requirements and/or district/BOCES policies.
- Carefully evaluate the condition of the vehicle (please see "Charter Vehicle Inspection Checklist" in Sample Forms and Documents section). It is not uncommon for charter bus companies to overbook and subcontract out to another bus company whose vehicles, operational records, and drivers may not meet a district's requirements. You should consider prohibiting this in your contracts with charter companies.

Arranging Contractor-Provided Bus Transportation

The use of other modes of transportation is a consideration when requests are made for travel over long distances, for trips that require more buses than a transportation department has available, or for weekend trips.

There are potential pitfalls associated with alternative modes of transportation and a district can incur liability in the event of an accident.

Suggestions for managing this exposure include:

- Ensure charter buses are DOT inspected and driven by operators with Article 19-A certification.

PRE-TRIP

This is perhaps the most important step in the risk control process. Pre-trip planning should be done on a team basis. Depending on the scope of the trip, members might include the safety or risk manager, athletic director, a school nurse, the district's broker or insurance representative, the

transportation supervisor, the building principal, school attorney, teachers and student club leaders.

Pre-trip risk control management includes:

- Review the district's policies concerning student travel. Policies contain restrictions that need to be considered. For example, travel limitations based on location and distance, fees, minimum chaperone-to-student ratios, and transportation insurance requirements.
- Review and amend the approval process, if needed.
- Review the procedures for collecting fees and other money. Ensure these procedures are consistent with district/BOCES policies and that all records are recorded, and cash is safeguarded.
- Review parental/guardian permission forms. Sample forms are on pages 20 & 36.
- Conduct a mandatory pre-trip meeting for parents, guardians, chaperones and students when overnight travel is occurring. The rules and itineraries (containing a detailed summary of each day's activities as well as lodging arrangements) must be distributed; the date and time for the Pre-Trip Baggage Inspection; food restriction due to food allergies; along with the ramifications for breaking the rules and the penalties for violations must be communicated.
- Require both the student and parent/guardian to sign an acknowledgement, indicating that they have read and understand the district's code of conduct. If applicable, the athletic code of conduct or contract should be signed as well. Parents/guardians must be advised that they will be promptly

notified if a student is going to be sent home for a major infraction, and that they will bear the cost of these additional travel expenses.

- Check overnight accommodations to ensure they are suitable for students. There should be no access to mini-bars or telephones that allow outside calls that can be charged to the room. Discourage in-room movies and games.

DURING THE TRIP

Once the trip is underway, the most important task is supervision. The trip leader needs to supervise and manage the activities of both students and chaperones. Chaperones must be adequately training in the expectations and their duties. Each trip presents its own set of challenges and needs. Suggestions for overnight travel and sports camp include:

- Limit the amount of free or down time. Schedule staff to supervise students during these times.
- Provide security during the night. Depending on logistics, chaperones should be on duty overnight with access into student sleeping quarters.
- Provide telephone access for coaches and staff. They should have access at all times to a building or central office administrator and be able to contact each other.
- Take 'head counts' at different times during the day to keep track of the students and their whereabouts.
- Ensure the chaperone/student ratio is adequate for the group and activities planned. Younger groups generally require more supervision and lower chaperone/student ratios.

For special needs students, follow any requirements in their IEP for supervision needs.

- Ensure that curfews are enforced with mandatory bed checks. Some districts have student sign-in procedures.
- Create and bring a phone chain (parent/ guardian numbers) and ensure a current photo of each student and chaperone is readily available. One subscriber requires a photo of each student with the student's personal information on the back of the photo.
- Plan for disruptions in schedules. For example, if there is inclement weather and a rainout, be prepared to direct students to substitute activities.

Sleeping arrangements on coed trips also

present unique challenges. Adjoining rooms between males and females are not permitted. Coed room hopping must be prohibited and if violated, considered a major infraction.

The following measures should be taken in the event of an accident or medical emergency:

- Preserve or photograph evidence such as defective athletic or recreational equipment.
- Do not make statements regarding fault or responsibility to others.
- Check student permission forms for information on student medical conditions and insurance and share with medical professionals as necessary.

How one district solved the curfew dilemma:

After learning that students were leaving the hotel after bed checks, one ingenious teacher placed tape across the doors after the rooms were checked. When he learned that the students carried their own rolls of the same tape he used, he began signing his name to the tape after he taped the room doors. That worked.

EPIDEMIC/PANDEMIC

Traveling within the region, interstate or to a foreign country during times of epidemics or pandemics requires thorough risk evaluations. The Centers for Disease Control and Prevention has health warnings for travelers both domestically and internationally. These warnings need to be heeded before undertaking travel to disease "hot spots".

POST-TRIP

Post-trip risk control efforts focus on the

management of accidents or incidents on a field trip. Student incident reports should be completed during the field trip or immediately upon return. It is a good idea to carry several student incident forms while traveling. Accidents should be reported to the district's insurance representative or NYSIR Claims at nysirclaims@nysir.org or 1-800-476-9747, ext. 1380.

The following information should be communicated:

- The nature of the accident
- Description of injuries

- Names and contact information for witnesses
- Supervisors present
- Other pertinent information.

In the case of a serious accident after regular business hours, call the NYSIR Emergency Hotline at 1-800-894-9341.

CHAPERONES

Choosing the right chaperones is essential to having a successful class trip. Clearly, chaperones serve a vital role in supervision, and their roles can vary greatly depending on the length, distance and complexity of the trip.

Your chaperones can be staff, volunteers or a mix of both. Generally, staff members would be preferred since they are accustomed to student supervision and know the district's policies and procedures. If an emergency arises, students would be at ease with the more familiar staff members. Staff members should be instructed to help volunteers, or they can be matched with a volunteer before the trip.

Before the trip begins, ensure that your chaperones have met the requirements of all school volunteers (see Sample Volunteer Application on page 21). Ensure the district has wireless numbers and emergency contact numbers for all chaperones. References should be checked. Generally fingerprinting and a criminal background check are required.

The Board of Education must formally approve chaperones. Most people who volunteer to assist with field trips are

caring, giving people with good intentions, pedophiles and other criminals look for opportunities to be in close contact with children and adolescents.

Train chaperones. Chaperones often do not have experience supervising groups of students, and they are generally not aware of the district's policies and procedures concerning travel. Nor are they familiar with the district's Code of Conduct. Chaperones of both genders are recommended on field trips. This is essential in case someone needs to enter a bathroom or locker room in an emergency or to search for a student.

Before overnight trips occur, plan a mandatory pre-trip meeting with chaperones to discuss the district's rules and the travel itineraries that include a detailed summary for each day. Meetings and training sessions with approved chaperones should include information about:

- Where they should be stationed or supervising during the trip.
- An explanation of the district's expectations for chaperone performance and behavior. Chaperones should be aware of how their performance affects the district's reputation.
- The district's Code of Conduct, policies on drugs and alcohol, sexual harassment and discrimination and other policies should be distributed and explained. Instruct chaperones that school rules and Code of Conduct still apply on the trip. Prohibited behavior (and consequences) should be discussed. The emergency management plan needs to be distributed and explained as well.
- The rules and protocol for the

trip should also be distributed and explained including information on such matters as overnight procedures, sleeping arrangements and curfews.

- Review “What if” scenarios, such as: What if a student gets sick? What if a student cannot be accounted for? What if a student loses his or her passport? What if there is an emergency at the student’s home?
- Within legal limits, students with medical needs should be identified, and arrangements made for administration of their medication be a staff member.

Chaperones should be informed that they cannot focus only on their own child or a select group of students. They are responsible for the entire group on the trip. Chaperones need to assist the trip leader and follow directions as needed. Chaperones should endeavor to learn all of the students’ names and take attendance frequently to ensure that no one is left behind.

While on the trip, the chaperones should be aware that they are role models and should follow the rules that apply to students. They should be polite, wear their seatbelts, and model all the behaviors expected of students. If there are activities (bicycle riding, rafting, rock climbing, skiing, etc.) planned during the trip which require protective gear such as helmets, they should not only ensure that the students are wearing it, but they should wear it too.

Chaperones should be advised about the potential for problems during down or free time. When delays occur, waiting students might partake in pranks and horseplay or

begin engaging in inappropriate activities. This time period is when the role of the chaperone is particularly crucial. Chaperones should be prepared to provide alternative activities and give direction to the students. Chaperones should also be instructed about the ramifications for students who break the rules.

When traveling, chaperones will have to communicate and make timely decisions. Unexpected issues can arise such as schedule changes, weather problems, power failures or fire alarms.

Naturally, chaperones should not be seen smoking or drinking, and should set a good example for the students.

Chaperones should be provided with a list of emergency numbers and a first aid kit.

Here are some other issues that can be discussed:

- Communication - Instruct chaperones to pre-program emergency numbers into their phones before the trip. If the trip is to be overseas, consider obtaining international cell phones or temporarily upgrading cell service.
- Hotel - Information on safe evacuations and a copy of the floor plan should be available. Upon arrival, select a meeting point for assembly in case an evacuation is needed.
- Overseas Trips - Consider providing a foreign dictionary with emergency phrases to the chaperones before the trip. Ideally, select chaperones who are proficient in the language spoken at the destination.
- Charter Buses – Inform chaperones that charter buses should be evacuated

from the back to the front, since the chance of fire is more apt to occur in the rear of the bus, unlike in a typical yellow school bus where the risk of fire is greater in the front. Overheated brakes, leaks, and smoking in the lavatory are some reasons fires can occur on coach buses. Position chaperones, coaches or teachers throughout the bus during the trip, rather than seating them all toward the front. Supervisors positioned in

the back should be reminded to open and check the restrooms if there is an emergency. Understanding how to conduct swift and thorough evacuations on charter bus trips is an important part of field trip safety and should be explained to your Chaperones. Chaperones have accepted a serious responsibility and should be commended for their efforts upon the conclusion of the trip.

Foreign Travel

Before planning foreign travel, *trip planners should determine if this travel is permitted.*

Most school district administrators and boards of education have changed their policies concerning travel outside of the U.S. Some districts prohibit foreign travel, others allow it, but on a limited basis. If it is allowed, the criteria for approval may be more restricted than in the past.

If foreign travel is anticipated, administrators should contact the U.S. Department of State. The U.S. Department of State web site has warnings about traveling in foreign countries. This web site can be accessed at: <https://travel.state.gov/content/travel.html>

The Centers for Disease Control (CDC) web site has health warnings for U.S. travelers. This web site can be accessed at: <https://www.cdc.gov/coronavirus/2019-ncov/travelers/index.html>

Conducting a threat assessment of the destination is a prudent idea. Countries and destinations that were popular tourist sites in the past may no longer be suitable

for school-sponsored travel. Neighborhoods may have changed, or increased security may limit access that was previously open.

Further Advice from the U.S. Department of State includes:

- A valid U.S. passport is required to enter and leave most foreign countries. All persons traveling by air from Canada, Mexico, the Caribbean, and Bermuda must have a passport to enter the United States. This is true even if the foreign country visited does not require a passport for entry. Since it can take several weeks to obtain a passport, students are urged to apply several months in advance of the trip. Information about how to obtain a U.S.

passport, and about traveling abroad, is available on the Department of State's website at <http://www.travel.state.gov/>.

- Register in the State Department's Smart Traveler Enrollment Program (STEP) so that the State Department can better assist you in an emergency: Register travel plans with the State Department through a free online service at <https://travelregistration.state.gov>. This will help the State Department contact travelers if there is a family emergency in the U.S., or if

there is a crisis where the trip is taking place. In accordance with the Privacy Act, information on travelers' welfare and whereabouts will not be released to others without express authorization.

- Check overseas medical insurance coverage: Have students and chaperones ask their medical insurance companies if their policies apply overseas, and if they cover emergency expenses such as medical evacuation. If they do not, you might consider recommending supplemental insurance.

Managing the Terrorism Threat

Since the terrorist attacks of September 11, 2001 *and other international events, there have been changes in planning and coordinating school field trips.*

The following suggestions, developed with the assistance of subscribers while analyzing this issue, are warranted and may be helpful in deciding whether the trip should take place:

- Gauge the willingness of parents and guardians to allow their children to travel beyond the local geographic area.
- Evaluate the effectiveness of the district's emergency management plan for incidents that could occur while students are traveling.
- Be alert for changes in the national threat assessment level, and for advice and guidelines from the State Education Department or other authorities.
- Call ahead when planning travel to a specific venue to determine if there are closings, restrictions, or security procedures in place that make the trip impractical. Representatives from visitor bureaus, entertainment and sports arenas, and hotel and mall security officers can provide information about their current security status and procedures. Travel agents may be able to assist as well.
- Choose sites carefully. Even if a trip is planned to a Tier One city, it may not present a threat. For example, a trip to the Bronx Zoo is arguably less of a threat than a tour of the New York Stock Exchange.
- Permit students to "opt-out" of certain field trip components.
- Consider bringing representatives of the organization to the school for demonstrations or in-house programs when trips are canceled.
- Carefully evaluate domestic travel, particularly to major U.S. cities, such as

New York, Washington D.C. or Boston. Check with your travel agent or tour company, and the convention or travel bureaus in the cities your students are planning to visit. With heightened

security and periodic closings of tourist attractions, historical sites and roadways, security delays and tour restrictions, travel may no longer be advised or as simple.

Sample Forms and Documents

The following pages contain sample forms and documents for reference and use. These can be changed as needed to address district/BOCES situations, policies and requirements. For ease of use they may be downloaded from the NYSIR web site, www.nysir.org.

Request for Educational Field Trip

School: _____ Date: _____ Teacher: _____

TRIP INFORMATION:

Grade: _____ Subject: _____ Activity or Competition: _____

Destination/Location: _____ Date of Trip: _____

Explain how this trip will enrich and extend student learning:

Time leaving school: _____ Time returning to school: _____

Cost per student: \$ _____ Other costs to student: \$ _____

Number of students: _____ Number of teachers: _____

Number of chaperones: _____

(Attach a list of students, teachers and chaperones)

TRANSPORTATION VIA:

☐ School bus(es). If so, how many? _____

☐ Contracted carrier – specify company and number of buses: _____

☐ Private transportation ☐ Public transportation

☐ Other _____

(If a contracted carrier is involved, the transportation supervisor must be consulted before making any arrangements.)

APPROVAL:

Principal: _____ Date: _____

Assistant Superintendent for Ins _____ Date: _____

Superintendent: _____ Date: _____

Please attach permission slips, insurance certificates and other required documentation.

Parental/Guardian Permission Form

I _____ give permission for _____
 (Name of Parent/Legal Guardian) (Name of Student)

to attend the following trip: _____

Transportation provided by¹: _____

TRIP ITENERARY AND REQUIREMENTS:

Insert the Trip Itinerary Here or refer to an Attached Document, along with a Description of Hazards, Skills or Conditioning that may be Required of Participants.² Also Include a List of Required Equipment and Supplies.³ (To be completed by the Trip Leader)

I understand that the leaders will make every attempt to reach me, but in the event emergency treatment is necessary, I give the trip leaders the right to transport and authorize medical treatment on behalf of my child.

My child's physician is: _____
 (Name, Address and Telephone Number of Child's Physician)

Two emergency contacts are: _____
 (Name, Address and Telephone Number(s))

 (Name, Address and Telephone Number(s))

My child has the following medical conditions that would interfere with his/her participation on this trip: _____

My child takes the following medication: _____

I will make arrangements for him/her to receive his/her medication, as required.

My child and I have read and understand the school's Code of Conduct. We agree to abide by these rules.

I _____ (Parent/Legal Guardian) hereby covenant and agree to release and hold harmless the _____ (Name of District) from and against any and all liability, loss, damages, claims, or actions (including costs and attorney fees) for bodily injury and/or property damage, to the extent permissible by law, arising out of participation in the (Name of Trip).

¹If transportation is not provided, state so. For example, "The (Name of District) will not be providing transportation. Students and their parents/guardians must make their own arrangements".

²For example, for a rafting trip a district may indicate that participants must know how to swim since rapids and fast water will be crossed.

³Such as special clothing, insect repellent, backpacks, etc.

Parental/Guardian Permission Form – Foreign Travel

I _____ give permission for _____
 (Name of Parent/Legal Guardian) (Name of Student)

to attend the following trip: _____

Transportation provided by¹: _____

TRIP ITINERARY AND REQUIREMENTS:

Insert the Trip Itinerary Here or refer to an Attached Document, along with a Description of Hazards, Skills or Conditioning that may be Required of Participants.² Also Include a List of Required Equipment and Supplies.³ (To be completed by the Trip Leader)

I understand that the leaders will make every attempt to reach me, but in the event emergency treatment is necessary, I give the trip leaders the right to transport and authorize medical treatment on behalf of my child.

My child's physician is: _____
 (Name, Address and Telephone Number of Child's Physician)

Two emergency contacts are: _____
 (Name, Address and Telephone Number(s))

 (Name, Address and Telephone Number(s))

My child has the following medical conditions that would interfere with his/her participation on this trip: _____

My child takes the following medication: _____

I will make arrangements for him/her to receive his/her medication, as required.

My child and I have read and understand the school's code of conduct for foreign trips. We agree to abide by these rules. Passport, immunization and other travel requirements have been explained by the district, and I agree to comply with these recommendations. The district's code of conduct regarding, among other things, smoking, drug and alcohol use apply on this trip as well.

I _____ (Parent/Legal Guardian) hereby covenant and agree to release and hold harmless the _____ (Name of District) from and against any and all liability, loss, damages, claims, or actions (including costs and attorney fees) for bodily injury and/or property damage, to the extent permissible by law, arising out of participation in the (Name of Trip).

¹If transportation is not provided, state so. For example, "The (Name of District) will not be providing transportation. Students and their parents/guardians must make their own arrangements".

²For example, for a rafting trip a district may indicate that participants must know how to swim since rapids and fast water will be crossed.

³Such as special clothing, insect repellent, backpacks, etc.

Transportation Permission Form

When the District is Not Providing Transportation

I _____ give permission for _____
(Name of Parent/Legal Guardian) (Name of Student)

to attend the following trip: _____
(Identify Field Trip)

The district will not be providing or arranging transportation for this trip; therefore, other students and parents and/or guardians will provide transportation. To this end, I give permission for

_____ to be transported in a vehicle operated by _____
(Name of Student) (Name of Student, Parent or Guardian)

I understand that it is my responsibility to make certain that my child is safely transported to this event.

Parent or Legal Guardian does hereby covenant and agree to release and hold harmless the District from and against any and all liability, loss, damages, claims, or actions (Including costs and attorney's fees) for bodily injury and/or property damage, to the extent permissible by law, arising out of participation in the Name of Trip.

Participant

Date

Parent or Legal Guardian

Date

Parent/Guardian Transportation Consent Form

My child, _____ has permission to participate in
the trip to _____ ("activity") on _____.

I understand that a district approved parent volunteer driver, may be used to transport students to, from, and during the activity. The owner of the vehicle must carry insurance, a valid driver's license, be at least 21 years of age, have not received more than one moving violation in the past 12 months, and have not received a DUI violation nor any felony convictions involving the use of a motor vehicle.

The District's insurance does not cover damages arising from, or related to, the operation of any private vehicle. Any damages/harm resulting from a parent/guardian/or other private driver, arising from the operation of a motor vehicle in relation to the above listed activity, is hereby waived.

I confirm that I have read this consent form and agree to its terms knowingly and voluntarily. I also confirm that I am the parent or legal guardian of the student.

Parent or Legal Guardian

Date

Number(s) to be reached at during the activity

Self-Transportation by Student or Other Parent/Guardian

I _____ give permission for _____ to participate
Parent or Legal Guardian Date

in the following activity or event: _____
Identity of activity or event

The district will not be providing transportation for the activity/event; therefore, students and parents and/or guardians will provide transportation. To this end, I give permission for _____ to be drive himself/herself or to be transported in a vehicle
Name of Student

operated by _____. I understand that it is my responsibility to
Name Parent or Guardian

make certain that my child is safely transported to and from this activity or event.

_____ does hereby covenant and agree to release and hold harmless
Parent or Legal Guardian

the _____ from and against any and all liability, loss, damages, claims,
Name of District

or actions (including costs and attorneys fees) for bodily injury and/or property damage, to the extent permissible by law, arising out of transportation to and from the activity/event and to defend and indemnify the _____ against any claim or suit arising
Name of District

out of, resulting from or related to any bodily injury and/or property damage, to the extent extent permissible by law, arising out of transportation to and from the activity or event.

Parent or Legal Guardian

Date

Disclosure and Authorization for Release of Motor Vehicle Record (MVR) Information

I authorize (District or BOCES' name) and its designated agents and representatives, including but not limited to the company's insurance agent(s) and/or legal representative to obtain and review my motor vehicle record (MVR) information. I voluntarily supply the information necessary to obtain driver license information from any state where I have been licensed to drive a motor vehicle and release all parties involved from liability for doing so. I have the right, upon written request, to a complete and accurate disclosure of the nature and scope of the report and a copy of my Consumer's Rights under the Fair Credit Reporting Act. This authorization shall be valid in original, fax or copy form and shall serve as an ongoing authorization to procure MVR information on an ongoing basis during my employment, membership or contract period.

Fill out the information below so your MVR information can be obtained.

Full Name: _____ Date of Birth: _____
Print Last Name, First Name, Initial

Address: _____

City, State, Zip Code: _____

Diver License #: _____

License Class: _____ Issuing State: _____

Have you ever held a driver license in any other state other than the above-mentioned issuing state? ☐ YES ☐ NO

If YES, list all state(s) _____

In the past 5 years have you ever been convicted of a traffic offense (not including parking tickets) in any other state other than the above-mentioned issuing state? ☐ YES ☐ NO

If YES, list all state(s) _____

MUST CHECK ONE: ☐ EMPLOYEE ☐ VOLUNTEER

Employee/Volunteer Signature

Date

ATTACH A LEGIBLE PHOTOCOPY OF DRIVER'S LICENSE TO THIS SIGNED FORM

Student Assumption of Risk, Acknowledgment and Release for Field Trip Activities

I _____ desire to participate in the _____
Participant Name of Field Trip Activity

On _____
Date(s) of Field Trip

I understand participation in the _____ involves rigorous physical
Name of Field Trip Activity
activity and risks of physical injury.

I acknowledge that I attended a meeting held _____ where
Date and Place of Meeting
these risks were explained. I understand that the risks include a full range of injuries, from minor to severe, including death. Although protective equipment may be used, safety rules employed, coaching instructions provided, medical care provided, and other efforts taken, there is no guarantee that I will not be injured. I agree to assume and accept these risks.

Participant

Date

Parent or Legal Guardian

Date

Volunteer Application

INFORMATION ABOUT YOU

_____ Name	_____ Date
_____ Address	_____ Phone #1
_____ Email	_____ Phone #2
I case of emergency notify: _____	

Briefly state why you want to volunteer: _____

List you skills, interests,hobbies, community activities, work or professional experience:

List previous volunteer experience: _____

Names and addresses of organizations where you have volunteered: _____

Do you have transportation? ☐ Yes ☐ No

Do you have a valid NYS Driver's License? ☐ Yes ☐ No

License Number: _____ State _____

Do you have any restrictions on your license? ☐ Yes ☐ No

If yes, list all restrictions: _____

Can you provide transportation for others? ☐ Yes ☐ No

Have you ever been convicted of a crime (do not include traffic violations)? ☐ Yes ☐ No

If yes, please explain: _____

Volunteer Application, *Continued*

INDICATE WHICH VOLUNTEER ACTIVITIES WOULD BE OF INTEREST

**** LIST VOLUNTEER OPPORTUNITIES OFFERED BY YOUR DISTRICT ****

REFERENCES

Please list three references (not relatives) preferably persons who can attest to your ability to work with others in a volunteer capacity:

_____ Name & Address	_____ Telephone	_____ Relationship
_____ Name & Address	_____ Telephone	_____ Relationship
_____ Name & Address	_____ Telephone	_____ Relationship

VOLUNTEER AGREEMENT AND AUTHORIZATION

Volunteer candidates must meet the highest standard of conduct because of the district's responsibilities for those in its care. This information is to be used only to assist us in determining qualifications for a position as a volunteer.

I agree to conform to the district's rules and regulations to the best of my ability. I agree to participate in orientation and training. I understand that a criminal record (including fingerprinting) and Department of Motor Vehicles check may be made, and my references and experience checked. I release my criminal conviction record to:

Name: _____

Address: _____

I authorize all references listed to give you pertinent information and release all parties from any liability from furnishing this information.

Signature of applicant: _____ DOB: _____

Social Security Number: _____ Date: _____

Signed and sworn this _____ day of _____, 20_____.

Notary

Field Trip Attendance

PROGRAM DEVELOPED BY THE NY STATE POLICE PROGRAM

The New York State Police have developed a Field Trip Attendance System to help identify and track students/participants when they are on a field trip. The system includes a Field Trip Attendance Sheet and color-coded, numbered Identification Tags. You need to have Adobe Acrobat to use this program. More details on this program can be found at the following link:

https://www.troopers.ny.gov/Schools_and_Communities/Field_Trip/System_Description/

The Field Trip Attendance Sheet can be downloaded at the following link:

https://www.troopers.ny.gov/Schools_and_Communities/Field_Trip/System_Description/ftripattendsheet.pdf

The New York State Police has a Child Abduction Prevention program called Step Away for Safety that can be presented to students a few weeks prior to your outing. The program can be requested by completing a Presenter Request Letter that can be found at:

<http://www.troopers.state.ny.us/>

and forwarding it to your local State Police Troop Headquarters.

NYSP – Field Trip Attendance Sheet

School Name: _____ Date: _____

Teacher's Name: _____ Grade: _____

Destination: _____ Tag Color: _____

All individuals going should be on the list including all adults and the teacher(s).

(It is a good idea to give the teacher the last number so s/he easily remembers how many people there are.)

Tag No.	Last Name	First Name	Emergency Phone No.
1.	_____	_____	()
2.	_____	_____	()
3.	_____	_____	()
4.	_____	_____	()
5.	_____	_____	()
6.	_____	_____	()
7.	_____	_____	()
8.	_____	_____	()
9.	_____	_____	()
10.	_____	_____	()
11.	_____	_____	()
12.	_____	_____	()
13.	_____	_____	()
14.	_____	_____	()
15.	_____	_____	()
16.	_____	_____	()
17.	_____	_____	()
18.	_____	_____	()
19.	_____	_____	()
20.	_____	_____	()
21.	_____	_____	()
22.	_____	_____	()
23.	_____	_____	()
24.	_____	_____	()
25.	_____	_____	()
26.	_____	_____	()
27.	_____	_____	()
28.	_____	_____	()
29.	_____	_____	()
30.	_____	_____	()

Code Word (optional)

Checklist for Charter Bus Trips

BEFORE THE TRIP

- ☐ Make sure there is a written agreement in place with the transportation company, outlining the service being provided, as well as all details of the proposed trip, including dates, locations, and agenda.
- ☐ Insurance certificates, with prescribed minimum coverages, should be obtained from the company with the following minimum limits and coverages: Commercial General Liability (\$5 million per occurrence/ \$5 million aggregate and \$1,000,000 for sexual misconduct); Automobile Liability (\$5 million); and Worker's Compensation. The district/BOCES must be listed as an additional insured and a copy of the additional insured endorsement must be provided with the Certificate of Insurance.
- ☐ Check compliance with Article 19A (intrastate) and federal Department of Require the bus company to provide you with the names and recent drivers' license abstracts for a "pool" (three or four) of drivers that may be assigned to drive your charter trip. These abstracts would include any motor vehicle accidents, infractions, or convictions.
- ☐ Are the drivers "school bus qualified" (that is, fingerprinted and possessing a cleared criminal history) as required by Section 509 of the NYS Vehicle and Traffic Law?

DAY OF THE TRIP

- ☐ Verify the identity of the driver by requesting to see the driver's license. (This will ensure that only those drivers that you have already checked through the Bus Driver Certification Unit actually show up to drive the trip.)
- ☐ Carefully evaluate the condition of the vehicle (please see "Charter Vehicle Inspection Checklist"). It is not uncommon for charter bus companies to overbook and subcontract out to another bus company whose vehicles, operational records, and drivers may not meet a district's requirements. You should consider prohibiting this in writing.
- ☐ Evaluate the condition of the driver (sober, alert, etc.).

ON THE ROAD

- ☐ Monitor the driver's performance (speed, safe lane changes, proper following distances, etc.).
- ☐ Carefully monitor the driver's physical condition, particularly on long trips. Make sure the driver is taking necessary breaks.
- ☐ At the end of the trip, the person assigned to oversee the trip should direct a written report detailing any safety concerns that came about during the trip to the administrator responsible for student transportation.

Sample Coach Bus Trip Checklist

Items to be checked by authorized district representative, PRIOR to the trip.

Bus Company Name: _____ Date: _____

Departure Point: _____ Departure Time: _____

Destination: _____

Driver's Name: _____ Driver's Date of Birth: _____

Driver's ID Number: _____

Does Information match Driver's DMV Abstract? _____

Bus Number: _____ License Plate Number: _____

Make: _____ Year: _____

DOT Sticker Number (Diamond Sticker Found on Windshield): _____

DOT Inspection Date (Diamond Sticker Found on Windshield): _____

Check to see if Pre-Trip Inspection was completed by driver: _____

VEHICLE CHECKLIST

Lights: OK _____ Not OK _____

Tires: OK _____ Not OK _____

Oil Leaks Visible: ☐ Yes ☐ No

Exterior Appearance: OK _____ Not OK _____

Interior Appearance: OK _____ Not OK _____

Emergency escape windows are operable? ☐ Yes ☐ No

Safety Equipment (First Aid Kit, Fire Extinguisher, Reflective Triangles) ☐ Yes ☐ No

I have performed the state mandated Pre-Trip Inspection of this vehicle today and no defects were found.

Driver's Signature: _____

Authorized District Representative Signature: _____

District Person in Charge of Trip: _____

Position: _____ Cell Phone Number: _____

Sample Insurance Requirements Transportation

1. Notwithstanding any terms, conditions or provisions, in any other writing between the parties, the transportation contractor hereby agrees to effectuate the naming of the District/BOCES as an Additional Insured on the transportation contractor's insurance policies, except for workers' compensation and N.Y. State Disability insurance.
2. The policy naming the District as an Additional Insured shall:
 - a. Be an insurance policy from an A.M. Best A- rated or better insurer, licensed to conduct business in New York State. A New York licensed and admitted insurer is strongly preferred. The decision to accept non-licensed and non-admitted carriers lies exclusively with the District/BOCES.
 - b. State that the organization's coverage shall be primary and non-contributory coverage for the District/BOCES, its Board, employees and volunteers.
 - c. Additional insured status shall be provided by standard or other endorsements that extend coverage to the District/BOCES (CG 20 26) or equivalent. The decision to accept an endorsement rest solely with the District/BOCES. A completed copy of the endorsements must be attached to the Certificate of Insurance.
3.
 - a. The certificate of insurance must describe the services provided by the transportation contractor that are covered by the liability policies.
 - b. At the District's/BOCES' request, the transportation contractor shall provide a copy of the declaration page of the liability and umbrella/excess policies with a list of endorsements and forms. If requested, the transportation contractor will provide a copy of the policy endorsements and forms.
4. The transportation contractor agrees to indemnify the District/BOCES for applicable deductibles and self-insured retentions.
5. Minimum Required Insurance:
 - a. **Commercial General Liability Insurance**
\$5,000,000 per occurrence/ \$5,000,000 aggregate.
\$1,000,000 for sexual misconduct.

State that the commercial general liability policy affirmatively provides coverage for claims of negligent hiring, training and supervision, which may arise in the context of sexual molestation, abuse harassment, or similar sexual misconduct.

Sample Insurance Requirements Transportation, *Continued*

b. Automobile Liability

\$5,000,000 combined single limit for owned, hired, borrowed and non-owned motor vehicles.

c. Workers' Compensation and NYS Disability Insurance

Statutory Workers' Compensation (C-105.2 or U-26.3); and NYS Disability Insurance (DB-120.1) for all employees. Proof of coverage must be on the approved specific form, as required by the New York State Workers' Compensation Board. ACORD certificates are not acceptable. A person seeking an exemption must file a CE-200 Form with the state. The form can be completed and submitted directly to the WC Board online.

6. The Transportation contractor acknowledges that failure to obtain such insurance on behalf of the district/BOCES constitutes a material breach of contract. The transportation contractor is to provide the district/BOCES with a certificate of insurance, evidencing the above requirements have been met, prior to the commencement of work.

References

American Red Cross

<http://www.redcross.org>

Centers for Disease Control:

<http://www.cdc.gov/>

Federal Bureau of Investigation

<http://www.fbi.gov/>

NYS Education Department – Resources for School Administrators

<http://usny.nysed.gov/schooladmin/>

New York State Police

http://www.troopers.state.ny.us/Schools_&_Communities/

U.S. Department of Homeland Security

<http://www.whitehouse.gov/homeland/>

U.S. State Department:

<http://travel.state.gov/>

<http://travel.state.gov/travel/>