

<b>Topic:</b>	<b>Student Excursions</b>
<b>Effective:</b>	<b>September 2014</b>
<b>Review Date:</b>	<b>September 2017</b>
<b>Cross-Reference:</b>	<b>Administration of Prescribed Medication; Code of Ethics; Criminal Background Check; School Generated and School Council Funds; Student Fees; Supporting Students with Anaphylaxis; Supporting Students with Asthma; Supporting Students with Diabetes; Supporting Students with Seizures; Travel and Expense Reimbursement; Water Based Activities In, Near, Over or On Water</b>
<b>Review Date:</b>	<b>June 2019</b>
<b>Revision Date:</b>	<b>May 2017, June 2018</b>
<b>Responsibility:</b>	<b>Superintendent of Education (Family of Schools)</b>

**INTENDED PURPOSE:**

The Halton District School Board recognizes the importance of out-of-classroom experiences, which reinforce concepts learned in the classroom, provide for new and unique learning experiences, provide valuable cultural perspectives and make learning more interesting and relevant for students. **This administrative procedure clarifies for staff the processes required in order to undertake an excursion.**

**OBJECTIVES:**

The Halton District School Board Student Excursions Administrative Procedure is intended to ensure:

- excursions have curricular relevance or a direct relation to ongoing co-curricular or athletic activities sanctioned by the Halton District School Board;
- equity among Halton District School Board schools with regard to enhanced learning experiences;
- excursions offered to students provide reasonable value for cost;
- processes are in place to ensure the safety of students and staff involved in excursions; and
- **excursions endeavour to appropriately address the Board's expectations regarding equity (eg. financial circumstances, ability, etc.) and steps/accommodations are put in place to help overcome these challenges (ie. suitable time for fundraising, wheelchair accessibility, etc).**

**DEFINITIONS:**

**Excursions** are defined as off-site activities that require students to leave the school for a length of time longer than a day, including travel and accommodation. These activities may or may not include studies that may lead to a full or partial secondary school credit.

A **Day Field Trip** is an activity, which requires students to leave the school for a length of time not longer than a day. Procedures for Day Field Trips are outlined in the Day Field Trip and In-School Presentations Administrative Procedure.

**Performances and Competitions** are activities that provide students with a unique opportunity to showcase their talents and/or compete with students from other schools. Where these events require students to leave the school, they will be classified as a Day Field Trip or Excursion depending on their duration.

**Short-Term Exchanges** are defined as opportunities for Halton students to visit with students in another part of Ontario, Canada or the world, and in return to host those students. Such exchanges generally last for a few days to a few weeks, involve a group of students travelling together with supervisors, and have a cultural focus. Short-term exchanges are considered to be excursions. **Note: billeting is not supported by HDSB.**

**Long-Term Exchanges**, as defined in the Education Act, Section 49(7) a, are arranged by the individual student and their family and therefore do not fall under the scope of this procedure.

**Non-HDSB Staff Generated Travel** (often referred to as Student Holiday Travel) is defined as any trip not specifically organized by board staff, regardless of purpose.

- Non-HDSB Staff Generated Travel is not supported in any way by the Halton District School Board.
- No Halton District School Board employee shall solicit, encourage, promote or communicate anything about Non-HDSB Staff Generated Travel during regular work hours, after work hours and by any means of communication (e.g., speaking directly to families, email, social media, etc.). In circumstances where a staff member also works/volunteers for another organization (e.g., Scouts), they may communicate to that particular group about travel opportunities specific to that group but should not do so using a Board email account.
- Halton District School Board property will not be available for any organization promoting this type of travel.

School and/or Board arranged excursions are sometimes arranged over school holidays as they reduce the amount of school time missed by students. These excursions will have curricular relevance and/or a direct relation to ongoing co-curricular or athletic activities sanctioned by the Halton District School Board (i.e. enhance classroom learning, enrich co-curricular activities, provide cultural experiences directly related to specific school goals) and are not to be promoted as student holiday travel or vacations. Approved HDSB sanctioned trips are not considered "Student Holiday Travel".

A **Supervisor** or **Chaperone** is an individual who has reached the age of 18 and has agreed to assist in the supervision of a group of students. Supervisors must have a Criminal Background Check with Vulnerable Sector Screening or current Annual Offence Declaration on file with the Halton District School Board. At least one supervisor/chaperone on every excursion must be an employee of the Halton District School Board. If there are both male and female students on the excursion, there must be both male and female supervisors/chaperones. Supervisors/chaperones may not receive remuneration for their services beyond being offered free transportation and accommodation during an excursion. **This includes not receiving any kind of personal benefit from the travel company or hotel such as, but not limited to, free trips and/or merchandise, reduced rates on a future trip or travel points.**

**PROCEDURES:**

The Halton District School Board supports the participation of staff and students in excursions where the purpose of such excursions is to enhance classroom learning, enrich co-curricular activities, or provide cultural experiences directly related to specific school goals.

**General**

The Halton District School Board expects that excursions are offered on an equitable basis, taking into consideration the accommodation of disability related need and/or limited financial means. Where excursions are for curricular purposes and attached to a particular course, schools are to ensure alternate provisions which provide an equivalent learning experience for students choosing not to take part in optional activities. Excursions are to be planned well in advance in order to allow families, students, and schools to budget accordingly and have a plan for supplementing the cost of activities where that cost would cause a student and/or their family financial hardship.

Student activities should not be scheduled on Professional Activity or other identified staff learning days; however, it is acceptable for excursions to span normal holiday periods (e.g. March Break, December Break) with the understanding that participating staff will not be remunerated in any way for their voluntary supervision/chaperoning of such excursions. Exceptions may be approved by the School Superintendent.

The Halton District School Board reserves the right to exclude students whose pattern of behaviour is such that their participation may pose unreasonable risk to the safety and enjoyment of the activity for themselves and/or the other participants. Such exclusion is at the discretion of each individual school Principal.

Trip cancellation insurance is mandatory on all excursions and is to be provided by and purchased from the service provider. This ensures consistency if the service provider and/or the Halton District School Board needs to postpone or cancel an excursion where the level of actual or potential risk has increased due to specific or global events or circumstances in the intended destination. In such instances, the Board assumes no responsibility for any financial loss incurred by participants.

**Costs**

The Halton District School Board expects that all essential learning activities will be provided without cost to students. Out of classroom activities during school hours must be available to all students in a designated class, grade or course, and be charged on a cost-recovery basis only.

**Excursions, be they curricular, co-curricular, cultural or athletic in nature, must provide reasonable value for cost and meet the Board's expectations regarding equity among students. Excursions should be planned far enough in advance so as to allow for fundraising such that any student who wants to participate may.**

All money collected and disbursed related to excursions must be handled in accordance with the Halton District School Board School Generated and School Council Funds Administrative Procedure and related processes. Where warranted, a fee may be charged to recover the cost of supply teachers for excursions.

Where fees change after collection of funds and result in a surplus of over \$20.00 per student, the surplus funds must be returned to families by a refund prorated to the portion of the field trip cost paid by each parent or via an alternate benefit to the affected students.

The Halton District School Board expects that the cost to students for excursions will accurately reflect all incentives being offered by service providers. Any incentives offered by travel companies or hotels must be used to directly benefit the students taking part in the excursion. Supervisors/chaperones may not receive remuneration for their services beyond being offered free transportation and accommodation during an excursion.

### **Transportation**

When excursions do not involve flights, bus is the preferred method of student transportation. Coach bus rentals for excursions must be made using a Halton Student Transportation Services approved operator or the Board's approved travel agent. Renting vehicles to transport students is not recommended. HDSB will not be responsible for any insurance deductible or premium adjustment as the result of an accident while a personal or rented vehicle is being used on board-related business. **Permission forms must clearly indicate the type of transportation that will be used throughout the excursion so parents are aware and provide permission.**

### **Supervision**

**The HDSB expects at least one supervisor on every excursion must be an employee of the board. For inter-school athletic excursions, the supervisor must specifically be a teacher or administrator employed by the board. Where there are both males and females on the excursion, there must be both male and female supervisors/chaperones.**

The ratio of staff supervisors/chaperones to students on an excursion should be decided with the following considerations in mind:

- inherent risk factors based on destination and activities
- number of students participating
- age and maturity of students
- familiarity, or lack of familiarity, with the trip experience/environment (e.g., different language, culture, laws)

Non-staff chaperones must comply with up to date criminal reference check processes and any participant, supervisor or student, on an excursion who is not from the sponsoring school must be authorized to participate by the Principal.

### **Safety**

The Halton District School Board does not support excursions where there exists undue risk. Risk takes many forms and the identification and analysis of risk should occur at the school level prior to the excursion application submission (**e.g., travel advisories, Ophea Safety Guidelines, water administrative procedure, etc**). Where elements of risk are evident, school staff planning the trip, as well as contracted travel companies, will ensure that appropriate pre-departure education takes place with students prior to the trip.

### **RESPONSIBILITIES:**

Safe and appropriate excursions require due diligence by many people.

The Halton District School Board expects each teacher planning an excursion to:

1. Submit to the Principal, early in the fall each school year or the school year prior, an Application to Undertake an Excursion/Excursion Approval by Superintendent Form for each proposed excursion for the school year, complete with a Costing Summary Form.

The exception is athletic excursions or other competitions/performances that cannot be planned in advance, and which may be dependent upon variable team schedules, tournament opportunities and team standings for playoffs.

2. Ensure proposed excursions are costed out using a reputable travel agency who is registered with the Travel Industry Council of Ontario (TICO).

The Halton District School Board expects each school Principal considering excursions to:

1. Create a plan each fall for all excursions planned for the school year detailing the relevance, costs, sources of revenue, timing, destination, supervision, transportation, and planned communication. It is noted that some co-curricular excursions, such as Athletic and/or Arts championships, cannot be predicted or applied for in advance.
2. Critically reflect on the issue of equity and the following guiding principles before approving an excursion:
  - a. parent and student interest and commitment to the out-of-school experience
  - b. awareness of and respect for the financial and educational priorities articulated by the school community in relation to the excursion
  - c. overall, and reasonable, value for cost
  - d. accessibility (physical, socioeconomic, etc.) and participation by all interested students.

The Halton District School Board expects each Family of Schools Superintendent to:

1. Review the details submitted on the *Excursion Approval by Superintendent Form* prior to approving or denying any requests for student excursions.

Note that excursions remain “proposed” until the required forms are signed by the Family of Schools superintendent and thus the trip should not be advertised nor should any money should be collected from students until this time.

Upon approval of the excursion, the HDSB expects the appropriate school staff to:

1. Arrange and host Information Nights and generate permission letters using the excursion information submitted and approved.
2. Deposit funds, reflecting cost recovery, into School Generated Funds (SGF) account in accordance with the HDSB School Generated and School Council Funds Administrative Procedure, unless this is done directly through School Cash Online or payments are made directly to an accredited, board-approved company providing excursion services.
3. Pay invoices related to the excursion in a timely manner.
4. Ensure timely and situation appropriate communication with students and families to best prepare them for the excursion location and events.
5. Ensure all relevant medical and emergency contact information is collected from families.
6. Ensure all appropriate paperwork is on file with chaperones/supervisors as well as with the school administration prior to departure (e.g. permission letters, medical forms, medical plans of care, transportation manifests, etc).
7. Follow HDSB financial expectations while on the excursion:
  - a. Invoices for expenses incurred while on an excursion must be submitted to the appropriate office staff accompanied by a Request for Funds Form. Where payments are required prior to the date of the event (e.g., airfare) or where payment must accompany a group to a destination, a written confirmation/contract/booking detailing cost per participant, taxes and total due may be used to issue a

cheque or payment via Board issued pcard; in these cases, a receipt for payment should also be requested. Advances of funds to be carried as cash during an excursion are not allowed.

- b. In the situation where the service provider (airline, hotel, etc.) is unable to invoice the school for the costs of the excursion so that the school may pay via school cheque, the school can pay via Board issued pcard or obtain the services of a board approved vendor to book travel and accommodations. When a board approved vendor is used, a copy of the Excursion Approval by Superintendent Form must be submitted to the Accounting Analyst in Business Services to facilitate payment.
- c. Gratuities or fees expected in cash during an excursion must either be detailed on the invoice from the tour company, or incurred as expenses by the excursion supervisor(s), to be reimbursed upon submission of receipts attached to a Request for Funds Form. Reimbursement for gratuities will be made if they are documented and within a reasonable amount. Expenses not built into the cost charged to student participants may not be reimbursed from funds collected from other student activities. Advances of funds to be carried as cash during an excursion are not allowed.
- d. Refunds to students unable to take part in an excursion are reflective of the cancellation insurance and the school will only issue a refund if the excursion provider issues a refund to the school. In all cases of refund, a Request for Funds Form and verification of both the student's absence and their original payment are required as backup for issue of a refund cheque.

**In conclusion, properly planned and well executed excursions are a valuable part of the educational experience; they occur when everyone involved does their part to ensure success and minimize risk.**