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# Educational Excursions Policy

## Policy Directive

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Date Approved: November 2011

Projected Review Date: November 2014

### **BACKGROUND INFORMATION**

#### **Applicable Reference from the Policy**

Hamilton-Wentworth District School Board is committed to ensuring a quality education for students which includes the opportunity to participate in educational excursions.

#### **Definition**

##### **Educational Excursion:**

An educational excursion is any approved and supervised activity or program off school premises. The Educational Excursion Policy describes an educational excursion as “an educational learning experience for students that takes place outside their school campus, designed to enhance and enrich the overall educational experience, and linked to the curriculum and/or HWDSB strategic directions. Educational excursions provide the opportunity to explore the local community and culture, and beyond. Educational excursions should support opportunities for students to achieve their potential. Educational excursions represent but are not limited to live theatre, live music, art galleries, museums, historical sites, cultural events, healthy active living activities, environmental excursions and educational films and documentaries related to the Ontario Curriculum. The terms field excursion, student/school excursion and excursion are deemed to be synonymous with the term educational excursion.”

#### **1.0 Educational Excursion Planning:**

**1.1** Any activity off school premises or travel tour which is not approved by the Principal as part of the school program shall not be promoted or organized during school hours or in association whatsoever with the school or Board.

**1.2** Educational excursions should be appropriate, constructive in nature and must be planned to meet student learning expectations.

**1.3** Educational excursions must be compatible with the age and learning development of the students.

**1.4** Schools are encouraged to create opportunities for students to experience the richness and diversity of their local community and culture.

**1.5** Planning for educational excursions should ensure accessibility to all students, regardless of race, religion, socio-economic status, gender, sexual orientation or (dis)ability.

**1.6** The School Code of Conduct and Code of Conduct on School Related Vehicles is applicable to educational excursions. On rare occasions, students may be denied participation on an educational excursion if the student has continuously demonstrated a pattern of behavior in violation of the Codes of Conduct at school or school related events prior to the excursion. Principals should discuss their concerns and review options with the parent/guardian, and discuss the rationale for their recommended decision with the Superintendent of Student Achievement prior to the excursion. Where a student is denied participation on an educational excursion, teachers must provide the student with an in-school opportunity to meet the learning expectations of the excursion.

**1.7** A change in locale involves risks and responsibilities beyond those encountered in the classroom situation. Planning must extend beyond the usual lesson preparation to include pre-excursion instruction, effective preparatory communications with parent/guardian(s), the supervision and safety of the students during the excursion, and appropriate evaluation, assessment, and/or follow-up activities. A pre-excursion meeting with parents/guardians must be part of the planning for all out-of-province and out-of-country excursions, and for high-risk excursions and activities.

**1.8** In order to minimize the inherent element of risk of educational excursions, The Physical Education: Ontario Safety Guidelines, Elementary Curricular Guidelines, and Interschool Athletic Guidelines, and Physical Education: Ontario Safety Guidelines, Secondary Curricular Guidelines, and Interschool Athletic Guidelines are to be used. Current guidelines must be used. These guidelines are referred to as SAFETY Guidelines in the rest of the policy. Principals and teachers in charge must also refer to Administrative Memo S0#39 along with the High Risk Excursion/Activity Checklist.

## **2.0 Responsibilities**

### **2.1 Principals/Vice-Principals:**

- Before approving any excursion, Principals/Vice-Principals must ensure that all planning, preparation, proposed bookings, supervision and notifications, including those of inherent risk have been organized by the teacher in accordance with the Board approved Educational Excursions Policy and Policy Directive.
- Principals and teachers in charge must also refer to Admin Memo S0#39 along with the High Risk Excursions and Activities Checklist.

### **2.2 Teachers:**

- When planning an excursion, teachers are required to follow the Board approved Educational Excursions Policy and Policy Directive.
- Principals and teachers in charge must also refer to Admin Memo S0#39 along with the High Risk Excursions and Activities Checklist to ensure all necessary arrangements are made.
- Planning should include accounting for all excursion costs and expenditures.
- Teachers are required to inform students and volunteers of all expectations in participating in the excursion and to ensure parents are informed of all details of the excursion, including inherent risk where applicable.

- The teacher shall consult with the Principal and the parents of students who are medically fragile, at risk, or require special assistance in their daily learning program in order to determine the participation of the student on an educational excursion. When the student will be participating, an emergency plan needs to be in place.
- For the duration of the excursion, the teacher will have access to student information, contact and medical (and any other vital) information. Teachers will ensure that each student has identification on their person. In advance of the excursion, the teacher and school administration will review a communication strategy should there be an emergency.
- Teachers are expected to refrain from smoking and using alcohol during the excursion.

### **2.3 Students:**

- Students are expected to adhere to educational excursion expectations, the School Code of Conduct and Code of Conduct on School Related Vehicles.
- Students are accountable to the Teacher and the Principal for their actions.
- Students are required to be prepared for the educational excursion with the appropriate clothing, equipment and supplies.
- Students are required to follow the directions of all personnel involved with the excursion.
- **Students 18 or over** are responsible for extended medical insurance for educational excursions that occur out of province or out of country.
- **Foreign Exchange Students** must have proper authorization and medical coverage for participation in educational excursions. Documentation detailing the terms and conditions of the exchange must be used in determining the eligibility for the student to participate. See section 6.4 and 9.6

### **2.4 Parents/Guardians:**

- Parents/guardians who give permission for their child to participate on an educational excursion are expected to be informed of the details of the excursion and to review them with their child.
- When giving permission, parents/guardians are required to inform the school of any medical conditions of the child and to provide current emergency information and contacts.
- Parents/guardians will consult with the Teacher and the Principal in order to determine the participation of a child who is medically fragile, at risk, or requires special assistance in his/her daily learning program.
- Parents/guardians are asked to support the School Code of Conduct and Code of Conduct on School Related Vehicles by reinforcing these expectations with their child and being prepared to assist the school in returning their child from the educational excursion in the event of an emergency or a breach of the School Code of Conduct by their child prior to the completion of the excursion. Arrangements and costs incurred shall be the responsibility of the parent/guardian.
- On the day of the educational excursion, in the event of illness, parents are asked to advise the school, in order that the excursion departure not be delayed.

### **2.5 Volunteers:**

- Volunteers must be identified by the teacher in charge and approved by the Principal. They will have fulfilled the volunteer screening processes outlined in Board Policy 7.16: "Volunteer Participation in Board Activities".

- The main purpose of a volunteer is to assist in the smooth operation of the excursion. Volunteers are expected to know the details of the educational excursion and their specific duties.
- Volunteers are expected to support the School Code of Conduct and Code of Conduct on School Related Vehicles, and report any inappropriate student conduct to the teacher.
- Volunteers are expected to adhere to the excursion schedule and dress appropriately for the purpose of the educational excursion.
- Volunteers are expected to refrain from smoking and using alcohol during the excursion.
- On the day of the educational excursion, in the event of illness, volunteers are asked to advise the school, in order that the excursion departure not be delayed.

## **2.6 Superintendents:**

- Superintendents are responsible for ensuring that educational excursions are planned in accordance with Board policy.
- Before approving Category II or Category III educational excursions, the Superintendent must ensure that the complete cycle of excursion planning has been followed, including the High Risk Excursions and Activities Checklist and that the requisite steps for risk management have been completed.

## **2.7 Insurance and Risk Management:**

- The administration of insurance matters is managed through Insurance and Risk Management. Insurance and Risk Management provides support to the School Principal regarding risk management and the assessment of school excursion activities. Insurance and Risk Management is the liaison and resource between Board staff and the insurer in regard to liability issues. Insurance and Risk Management prepares and issues an annual list of approved carriers each fall.

## **3.0 Educational Excursion Costs**

**3.1** Educational excursion costs are expected to be affordable to students and approved by the Principal. Costs for educational excursions, including fundraising, will be reviewed annually with input from the School Council.

**3.2** A plan for accounting for educational excursion costs and expenditures, including a plan for use of any residual funds, should be developed as part of monitoring, and should be approved by the Principal and shared with the parents/guardians. A balance sheet is necessary especially for high cost Category II and III educational excursions and is to be made available to the Principal. In the event of an insurance claim, a complete account of funds is required.

**3.3** The purchase of cancellation insurance by the Service Provider (Category II & III) is recommended and would be part of the cost of the educational excursion.

## **4.0 Application and Approval Process:**

Approval is required in accordance with the category of educational excursion being planned. Teachers must complete the Educational Excursion Application Form for approval within the timelines outlined below. Assistance in determining the category is available in the SAFETY Guidelines located in the Educational Excursions Binder, from the Principal, Insurance and Risk Management, and the Superintendent of Student Achievement.

The chart that follows outlines approval requirements.

<p align="center"><b>CATEGORY I</b> Principal</p>	<p align="center"><b>CATEGORY II</b> Principal Superintendent of Student Achievement</p>	<p align="center"><b>CATEGORY III</b> Principal Superintendent of Student Achievement</p>
<p align="center"><b>Approval Lead Time: Two weeks</b></p>	<p align="center"><b>Approval Lead Time: 3 months</b></p>	<p align="center"><b>Approval Lead Time: Over 5 days - <u>4 months</u> Out of country - <u>6 months</u></b></p>
<ul style="list-style-type: none"> <li>• in-province, departing and returning on the same day and not involving activities of increased inherent risk</li> </ul>	<ul style="list-style-type: none"> <li>• activities involving increased elements of inherent risk outlined in the <u>SAFETY Guidelines</u> i.e. water sports, high ropes, camping, skiing, cycling, snowboarding, canoeing,</li> <li>• all overnight educational excursions up to and including 5 days</li> <li>• all educational excursions out of province within Canada</li> </ul>	<ul style="list-style-type: none"> <li>• all educational excursions out of country</li> <li>• all educational excursions over 5 days</li> <li>• included in the above may be activities involving increased elements of inherent risk outlined in the <u>SAFETY Guidelines</u> ie. water sports, high ropes, camping, skiing, cycling, snowboarding, canoeing,</li> </ul>
<p>Teacher submits to the Principal for approval</p>	<p>Teacher submits to the Principal for approval, who will then forward to the Superintendent of Student Achievement for approval. Include the High Risk Excursions and Activities Checklist</p>	<p>Teacher submits to the Principal for approval, who will then forward to the Superintendent of Student Achievement for approval. Include the High Risk Excursions and Activities Checklist</p>
<p align="center"><b>Keep one copy of all applications and forms in the school office.</b></p>		

#### **4.1 Repetitive Visits and/or Spontaneous Neighbourhood Excursions**

Where permission is required for more than one visit by the same student or group of students, to the same destination or for the same purpose, or within the neighbourhood for physical education or spontaneous activities, the teacher in charge is expected to complete the appropriate application for approval, and upon approval, prepare a letter for parents/guardians to indicate:

- i) the number or kind (spontaneous) of visits
- ii) a brief rationale for the visits
- iii) a schedule of the proposed dates (repetitive) of the visits.

#### **4.2 Physical Education and Athletics**

Where educational excursions are part of the Physical/Health Education Program, teachers are to follow requirements outlined in: Physical Education Ontario Safety Guidelines Elementary Curricular Guidelines, and Physical Education Ontario Safety Guidelines Secondary Curricular Guidelines. The appropriate permission form for participating in physical activity and the current medical information form must also be complete. Please refer to Admin Memo SO#15 for information related to Athletics and Physical Education.

#### **4.3 Extra Curricular Activities**

Where educational excursions are part of the Athletic Program, teachers are to follow requirements outlined in: Physical Education Ontario Safety Guidelines Elementary Interschool Athletics Guidelines, and Physical Education Ontario Safety Guidelines Secondary Interschool Athletics Guidelines. The appropriate permission form for participating in physical activity and the current medical information form must also be complete.

#### **4.4 Environmental/Outdoor Education Centres Operated by the Board (HWDSB)**

Day excursions to the Outdoor Education Centres are Category I Excursions. The Educational Excursions: Application for Permission, Educational Excursions: Parent/Guardian Permission and Emergency Health Information forms must be completed. Additional forms for Volunteers and Student Identification for Transport may be applicable.

#### **4.5 Unauthorized Activities**

Any activity off school premises or travel tour which is not approved by the Principal as part of the school program shall not be promoted or organized during school hours or in association whatsoever with the school or Board.

### **5.0 Supervision**

#### **5.1 Ratio of Supervisors to Students:**

- An adequate number of supervisors must be provided to cover eventualities such as accidents, discipline problems, health concerns, and late arrivals (missed deadlines).
  
- Alternative arrangements must be made with parent/guardian should it be necessary to return a student to the school/home prior to the completion of the excursion. No student shall be sent home unaccompanied by a excursion supervisor. Arrangements and costs incurred shall be the responsibility of the parent/guardian.

<p><b>The following minimum adult-to-student ratios are required: CATEGORY I</b></p> <p>Elementary 1:10  Secondary 1:15  Supervision ratios for walking excursions in the neighbourhood may be at the discretion of the Principal. A plan must be in place to cover eventualities such as discipline problem, health concerns and late arrivals.</p>	<p><b>CATEGORY II</b></p> <p>Elementary 1:10  Secondary 1:15  -unless activity involves higher inherent risks.  Supervision ratios must be in accordance with the <u>SAFETY Guidelines</u>.</p>	<p><b>CATEGORY III</b></p> <p>Elementary 1:8  Secondary 1:8  -unless activity involves higher inherent risks.  Supervision ratios must be in accordance with the <u>SAFETY Guidelines</u></p>
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**5.2 Supervision on Out of Country Educational Excursions:** Included in the ratio outlined under Category II and III an adequate number of male and female supervisors must be provided to cover eventualities such as accidents, discipline problems, health concerns, and late arrivals (missed deadlines).

Alternative arrangements must be made with parent/guardian should it be necessary to return a student to the school/home prior to the completion of the excursion. Arrangements and costs incurred shall be the responsibility of the parent/guardian.

### 5.3 Qualifications of Teachers in charge

It is required that at least one certified teacher, employed by The Hamilton-Wentworth District School Board, will be assigned to supervise each educational excursion. Non-teacher volunteer coaches must be under the supervision of a certified teacher, Vice-Principal or Principal, employed by The Hamilton-Wentworth District School Board. The Superintendent of Student Achievement must approve any exception in conjunction with the Principal. Volunteer supervisors and/or non-teacher volunteer coaches are to be approved by the school principal. Some activities require supervisors to hold specific certification in order to supervise the activity. This is especially significant for higher inherent risk activities such as camping, swimming, canoeing, rock climbing. For complete certification requirements, refer to: Physical Education: Ontario Safety Guidelines, Elementary Curricular Guidelines, and Interschool Athletic Guidelines & Physical Education: Ontario Safety Guidelines, Secondary Curricular Guidelines, and Interschool Athletic Guidelines.

## 6.0 Parent Information and Consent

### 6.1 Information and Permission

Parents/Guardians are to be notified of all educational excursions. Once approval for the excursion is received, the Teacher is to complete the following Educational Excursion forms: Information to Parent/Guardian and Parent/Guardian Permission and Emergency Information, and where required the Informed Consent form and forward to the parent/guardian of the student for information and consent.

If a student fails to return a permission form for a Category One educational excursion, permission by telephone from the parent/guardian may be granted. The name of the contact, date and time of the permission shall be recorded on an Educational Excursions: Information/Permission to Parent/Guardian form and signed by an adult witness (e.g. office administrator) for the phone permission.

### 6.2 Emergency/Health Information

Parents/Guardians must complete and sign the Educational Excursions: Emergency/Health Information form and return it to the school. This information is collected under the Freedom of Information and Protection of Privacy Act.

### **6.3 Informed Consent Information**

For all Category II and III educational excursions, the High Risk Excursions and Activities Checklist (AM SO#39) must be completed by the teacher in charge/principal and the Informed Consent Form – Category II and III must be forwarded to the parent/guardian for completion and returned to the school. For all Category I educational excursions, the Informed Consent – Category I must be forwarded to the parent/guardian for completion and returned to the school.

### **6.4 Foreign Exchange Students**

Consent must be covered by the documentation provided for the student under the exchange program permitting attendance in the school program. See 2.3 and 9. 6

## **7.0 Transportation**

### **7.1 Busing**

Bus carriers should be selected from the list of pre-approved carriers for the HWDSB, in accordance with the Board Transportation Policy. An approved carrier list is posted in the Excursions Information conference located in First Class. If the bus carrier is not listed on the approved carrier list, and you are unable to utilize any of the posted carriers then approval will need to be obtained by contacting the Purchasing Department.

### **7.2 Tour Companies**

Tour companies who arrange their own carriers for educational excursions are required to provide the following:

- a) Proof of general liability insurance for no less than 2 million dollars per occurrence.
- b) Proof of fleet auto insurance in the amount not less than 8 million covering passenger and road hazard.
- c) Proof of an in date Commercial Vehicle Operating Licence.

### **7.3 Volunteer Drivers using Private Vehicles or another Licensed Automobile**

Volunteer drivers are any persons authorized by the Principal, who have agreed to transport students while driving their own or another licensed automobile that meets the requirements of the Board outlined on the Educational Excursion Volunteer Driver Form. Volunteer drivers must hold a minimum of a valid Ontario Class G License. The driver/owner must complete the Educational Excursion Volunteer Driver Form and submit it to the teacher for Principal approval.

*Please note that volunteer drivers are not covered under the Boards Fleet Automobile Insurance. In the event of an incident Volunteer Drivers are required to contact their own insurance provider to seek coverage.*

### **7.4 Volunteer Drivers (Educational Staff) using Rental Vehicles**

Where vehicles are being rented by educational staff for Board-sponsored educational excursions, the full insurance coverage offered by the rental company is to be purchased (Public Liability, Collision and Comprehension). The driver must provide proof of a license required to operate the specific vehicle rented.

### **7.5 Student Volunteer Drivers using Private Vehicles**

If the volunteer driver is a registered student in the school, is 18 years of age, holds a valid Ontario Class G License, and the Board required insurance amount, the driver must complete the Educational Excursion: Volunteer Driver form and submit it to the teacher for Principal approval. *Please note that volunteer drivers are not covered under the Boards Fleet Automobile Insurance. In the event of an incident Volunteer Drivers are required to contact their own insurance provider to seek coverage.*

### **7.6 Student Driver using Private Vehicle to Drive Self**

Student drivers using a private vehicle to drive themselves must hold a valid Ontario Class G2 License. Student Drivers using private vehicles to drive themselves must be identified on the Identification for Transportation by Private Vehicle Form and on the Information to Parent/Guardian and permission for Educational Excursion form. *Please note that volunteer drivers are not covered under the Boards Fleet Automobile Insurance . In the event of an incident Volunteer Drivers are required to contact their own insurance provider to seek coverage.*

### **7.7 Student Identification for Transport**

**Approved Carrier:** Complete Student Identification for Transportation by Approved Carrier. The list must remain with the supervisor in charge of each student group and in the possession of the teacher in charge of the excursion. A duplicate list is to be kept in the school office in the event that parent notification becomes necessary.

**Private Vehicle:** Complete Student Identification for Transportation by Private Vehicle. The list must remain with the driver of each vehicle and a master in the possession of the teacher in charge of the excursion. A duplicate master list is to be kept in the school office in the event that parent notification becomes necessary.

At the conclusion of the educational excursion, the lists shall be collected and disposed of by school staff in accordance with confidential information procedures.

### **7.8 Transportation of Excursion Related Equipment and Supplies**

The transportation of excursion related equipment and supplies shall be done in accordance with the safety requirements of the approved carrier. The SAFETY Guideline or Educational Excursions Resource binder should be referenced when planning to transport equipment.

### **8.0 Requirements of Program Service Providers**

When purchasing services for specific programs from facilities, the requestor is to acquire proof of general liability insurance for no less than 2 million dollars.

Program Service providers must have certified instructors for higher risk activities that include (swimming, canoeing, skiing rock climbing, etc.) Refer to the SAFETY Guidelines for specific requirements for instructors. Where applicable, proof of TSSA licence and certification is required to be provided by the owner/operator.

### **9.0 Risk Management:**

**9.1 Intent:** Managing risk may assist in minimizing injuries ensuring a safe learning environment and reducing the liability exposure of the Board. Planning for educational excursions must include an emergency action plan, access to a first aid kit, and cancellation insurance if applicable.

**9.2 The Hamilton-Wentworth District School Board:** The Board, its employees and approved

volunteers who have been assigned duties by the principal are insured for liability in the event of a lawsuit alleging negligence while performing such duties for the Board.

**9.3 Inherent Risk:** Accidents can occur and cause injury at any time. However, some educational activity programs such as water sports involve increased elements of risk. The chances of an accident occurring can be reduced by carefully following instructions at all times while engaged in this type of activity. When an educational excursion involves an activity that could increase the potential of injury, parents/guardians and students need to be aware of and fully understand the risks involved in these activities. Part of the approval and permission process includes an Educational Excursion: Informed Consent Form to parents/guardians outlining these inherent risks and the right of the parent/guardian to refuse their child's participation prior to the parent granting permission.

**9.4 Student Accident Insurance:** The opportunity to purchase student accident insurance, at no cost to the Board, is made available to parents/guardians each September. The Hamilton-Wentworth District School Board does not provide any accidental death, disability, dismemberment or medical expenses insurance on behalf of students participating in educational excursions.

**9.5 Extended Medical Insurance:** It is the parent/guardian's responsibility to ensure that their child is covered by insurance appropriate to the educational excursion. Educational excursions out of province or out of country require out-of-province extended medical insurance coverage.

**Note: OHIP no longer covers all medical costs incurred outside of Ontario. It is the parent/guardian and student's responsibility to provide comprehensive medical insurance coverage. Written proof of coverage is to be provided to the school principal at least one week prior to the excursion in order to participate in an educational excursion outside of the province or country.**

**9.6 Foreign Exchange Student:** Medical coverage is not available through Provincial plans to foreign visitors. Exchange students must secure their own private medical plans and extent of coverage. The Board makes available the opportunity for any student in full-time attendance to purchase student accident insurance. See section 2.3 and 6.4

In the event of a lawsuit, if an injury occurred, the Board is insured for liability. The responsibility of the Board to the student remains the same whether or not the student has a medical plan.

### **10.0 Tracking Process:**

A tracking sheet will be completed by the school as part of the Education Excursion procedures which will provide information on the number of students attending each educational excursion, cost, type of activity, etc. This tracking form will be used to provide information regarding the opportunity for students in all schools across the district to participate in meaningful out-of-school learning experiences (see 'Educational Excursions Tracking Form').

**Resources:**

**Educational Excursions Policy Resources:** Persons planning excursions are advised to use the Educational Excursions Policy Resources file. Questions about the Policy should be referred to the School Principal. Principals may consult with the appropriate Superintendent of Student Achievement if further clarity is needed.

The following forms are included in the Educational Excursions Policy Resources file:

- a) Educational Excursions Effectiveness Planner
- b) Educational Excursions Checklist
- c) Educational Excursions: Application for Permission (Category I, and Category II and III)
- d) Educational Excursions: Information/Permission to Parent/Guardian
- e) Educational Excursions: Emergency/Health Information
- f) Educational Excursions: Informed Consent (Category I, and Category II and III)
- g) Educational Excursions: Volunteer Drivers
- h) Educational Excursions: Identification for Transportation by Approved Carrier
- i) Educational Excursions: Identification for Transportation by Private Vehicle
- j) Academic Memorandum SO#39
  - i) High Risk Excursions and Activities Checklist
  - ii) Consent Form – High Risk Activities
- k) Educational Excursions Tracking Form