

# Harker DAY Field Trip Planning Procedure and Checklist

## Definition

For Harker's purposes, a field trip is defined as an academic or non-academic outing that takes students from a Harker campus to another location that is *not* a Harker campus and is led by a member of the Harker faculty or staff. The only exceptions to this rule are daily interscholastic athletic competitions, which are not considered field trips. However, overnight trips for athletic competitions are field trips.

General guidelines for Chaperone and Faculty and Staff Driving on Field Trips are located in the division-specific Faculty Handbook, and should be reviewed before reading further in this document.

## Before you begin – here is what information you need to have at your fingertips before proceeding

- ☐ Date of trip \_\_\_\_\_
- ☐ Destination \_\_\_\_\_
- ☐ Purpose \_\_\_\_\_
- ☐ Time of departure \_\_\_\_\_
- ☐ Duration of activity \_\_\_\_\_
- ☐ Expected time of return to Harker \_\_\_\_\_
- ☐ Numbers of students \_\_\_\_\_
- ☐ Numbers of chaperones \_\_\_\_\_
- ☐ Names of chaperones riding student transport \_\_\_\_\_  
\_\_\_\_\_
- ☐ Any food to be served before or brought on the trip \_\_\_\_\_  
\_\_\_\_\_
- ☐ Accessibility of buses into the drop off location \_\_\_\_\_
- ☐ G/L Account to which any expenses will be charged (sufficient funds available?) \_\_\_\_\_
- ☐ Fees that buses/school vehicles may have to pay in tolls, parking fees \_\_\_\_\_
- ☐ Any expenses beyond transportation which will be funded through school accounts \_\_\_\_\_  
\_\_\_\_\_
- ☐ Any expenses to be paid in advance, and to whom and where they will be sent \_\_\_\_\_  
\_\_\_\_\_

## Here are the primary forms you should be prepared to process for a DAY field trip

- ☐ VersaTrans TripTracker Field Trip Request – Date submitted: \_\_\_\_\_
- ☐ Field Trip Permission/Acknowledgement – Dates distributed/received: \_\_\_\_\_

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## Documents you may need to hold or share, depending on the nature of the trip

- ☐ Field trip rosters, including separate travel rosters if students are on more than one bus

## Procedure for Field Trip Reservations in VersaTrans

Before any entering any field trip information in VersaTrans, any brand new or intermittent trips, as well as trips involving academic competition or clubs must be directly reviewed with and approved by the division head and dean of students, and Jennifer Gargano, Assistant Head, Academic Affairs. Even if a trip is sponsored by a club or extracurricular program, the effect of most every trip is felt somewhere on the academic continuum, which is under Jennifer's jurisdiction. **All trips that involve competitions must be reviewed every year, as there are no guarantees that Harker students will either participate every year or qualify for any secondary rounds of competition.**

### Information needed for initial approval

The following must be provided for pre-approval.

- ☐ Campus of origin \_\_\_\_\_
- ☐ Initiating teacher \_\_\_\_\_
- ☐ Attending group/class and size of group \_\_\_\_\_
- ☐ Number of chaperones needed \_\_\_\_\_
- ☐ Destination \_\_\_\_\_
- ☐ Purpose of trip \_\_\_\_\_  
\_\_\_\_\_
- ☐ Date and timetable of the trip \_\_\_\_\_
- ☐ Estimated budget and budget line to which any expenses will be charged \_\_\_\_\_  
\_\_\_\_\_
- ☐ Costs to be passed on to students and their families, and if so, acknowledgement of review of the school's refund policy \_\_\_\_\_

Assuming this is deemed purposeful, fundable, and fits in the schedule, initial approval may be obtained. All submissions for new field trips for an academic year should be submitted early enough that they can be entered into VersaTrans no later than September 30<sup>th</sup> for inclusion in the planning calendar. Exceptions can be made where a rare opportunity arises on short notice. Even in these rare cases, **21 days of advanced notice is required** to allow for processing the request and making any necessary transportation arrangements.

All recurring field trips may be entered directly into VersaTrans, as the email approval process will allow for appropriate review. Tutorials for the completion of all elements of VersaTrans Field Trip submissions are available through the faculty portal.

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## Parent Acknowledgement

All field trips require a Field Trip Permission/Acknowledgement Form to be generated by the trip coordinator and then approval signatures obtained from parent/guardians. This form is available online and a reminder included in the VersaTrans email acknowledgement process. The permission form must be signed, returned, and kept on file on the originating campus. For a single-day field trip, the forms should be sent home 14-21 days in advance, and returned 5-10 days before the trip.

The permission form indicates much of the information previously collected:

- ☐ Name of trip
- ☐ Date(s) of trip
- ☐ Campus of origin
- ☐ Time of departure from and return to campus
- ☐ Trip leader
- ☐ Date and timetable of the trip
- ☐ Timetable for return of the form
- ☐ Trip details: Who, what, where, why, how (and how much, if families bear some cost) – this is a detachable segment of the form that the parents can retain for their own information.

The *Release of Liability and Hold Harmless Agreement* is no longer a part of the form, as it is included in the Consent to Treat and Travel form signed by every parent which provides parent authorization for all such activities. The office of Student Affairs on the Saratoga campus verifies that all students have one of these on file at the beginning of each school year.

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## Field Trip Checklist

What follows is a check-the-box system of preparing and implementing a field trip.

### Before the Field Trip Departs

*Brand New trips / Club trips / Trips to Academic Competitions / Any trip with costs to be billed to parents*

- ☐ Discuss plans with department chair, dean, division head and gain provisional approval from the Assistant Head of School before any discussion with students or parents.
- ☐ Make sure that budgetary considerations have been fully addressed: sufficient departmental/organizational funds, limited and reasonable cost to parents if necessary, and gain administrative approval for cost structure as well.
- ☐ Once verbal approval is obtained and date/details confirmed, enter the information about the trip into the VersaTrans field trip system.
- ☐ Move forward with all other actions in accordance with guidelines below.

*All other trips not listed above, including those of an annual nature*

- ☐ Verify that funds are available in the proper General Ledger account to pay for transportation and other costs not passed on to parents.
- ☐ Once date and details are confirmed, enter information about trip into the VersaTrans field trip system to await email approval. Use “cloning” feature if so desired for recurring trips.
- ☐ Receive VersaTrans approval by email (indicating administrative approval) prior to moving forward with any site or air travel reservations.
- ☐ Make sure everyone has school phone number at hand in case of an emergency.
- ☐ Recruit additional chaperones as necessary to maintain proper ratio of students-to-chaperones. If teacher-chaperones are involved, make certain they arrange substitutes if teaching schedules are affected.
- ☐ Read and follow all guidelines regarding Chaperones on Field Trips located in the divisional Faculty Handbook to be able to effectively communicate responsibilities to your chaperones. This is especially important for parent chaperones.
- ☐ Generate permission slip, available through the Faculty Portal under Harker Forms.
- ☐ Fourteen (14) days in advance, if a meal request (lunch, snack) is necessary for the trip, request it utilizing the catering request system. **At the lower school**, pre-approval is required from the dean of students prior to making any such requests.
- ☐ Fourteen (14) days in advance, make any and all requests for cash advances that may be necessary to pay for parking, admissions, etc., utilizing the proper forms from the Portal, and have all necessary signatures on them.
- ☐ Seven (7) to ten (10) days before the trip date, receive signed permission/acknowledgement forms from parents.
- ☐ Seven (7) to ten (10) days before the trip date verify meal count with food service. This should include any vegetarian or special needs diet requests.
- ☐ Five (5) days before the trip, turn in completed permission forms to the office.
- ☐ Five (5) days before the trip, forward any final changes to the meal count to food service.

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- ☐ The day **before** the trip, pick up travel medical kit from nurses' office and go through the contents. There is much useful information and helpful supplies, but you won't know you have them unless you take a minute to see what you have been given. Glance through all the written health guides provided by the nurse and read the health summary and medication schedule carefully.
- ☐ The day **before** the trip, make sure all cash/admission tickets and the like are picked up from the office if those have been ordered for the trip.
- ☐ If you want a record of the trip for posterity, or if the trip is traditionally catalogued in Harker News or the division's student Yearbook, make sure there is at least one digital camera on the trip.

## The day that the Field Trip departs

- ☐ If food or snacks have been ordered, make sure they are there and loaded on the bus.
- ☐ Leave an accurate count of students who are taking part. If they are being transported by bus, this list should be forwarded to the office after roll is taken. If the trip is departing after normal school hours or on a weekend or during vacation, this information still must be left in the school office during open office hours prior to departure.
- ☐ Make sure that chaperones have exchanged cell phone numbers so easy contact can be made in case of emergency.
- ☐ If students are wearing school uniform or other specific attire, make certain that they are dressed properly before they get on the bus.
- ☐ ABC – Always Be Counting. Make certain you perform head counts on a regular basis: every time you have a vehicle stop; every time you enter or leave a site. This should become a regular routine, regardless of the trip's duration. The younger the students, the more frequent the counts.
- ☐ If the bus makes any stops en route and students will be allowed to get off, make certain that chaperones know the groups for whom they are responsible, that students are informed about the limits what they can do while stopped, and that there is another complete attendance taken before the bus(es) leave the area.
- ☐ If the nurse provides you with any medication that a child must take during the day, be certain that the instructions for dosage are available and clearly understood prior to dispensing.
- ☐ Make sure you begin to collect any and all receipts for expenses for reimbursement or for expenses spent with funds advanced to you. Provide as much detail as possible. A good rule of thumb is to write needed information on the receipt the same day that you get it, and maintain an envelope with all receipts.

## Upon arrival at any destination

- ☐ If the bus makes any stops en route and students will be allowed to get off, make certain that chaperones know the groups for whom they are responsible, that students are informed about the limits what they can do while stopped, and that there is another complete attendance taken before the bus(es) leave the area.
- ☐ Before students are allowed to disembark, make certain that chaperones are 'on the ground' and ready to receive them.

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- ☐ Orient the students and chaperones to the area. Let them know the meeting point at the site for everyone in case of an emergency or if they become separated from the group. If in an enclosed space (museum, conference site, etc.) make certain that everyone knows the emergency evacuation exits from the building.
- ☐ Have the school emergency contact information available to other faculty members so you or they can contact the school with an update in case of emergency or to request a treatment form to be sent to an urgent care or hospital should such services be needed.
- ☐ Make sure that chaperones and students know the chaperone groups to which they have been assigned and at first meeting, review the emergency evacuation and group meeting processes.
- ☐ Let everyone know the exact timetable(s) at which the group will reconvene for meetings/lunch/departure.

## In case of an emergency on the trip

- ☐ First, make sure that all students and chaperones are accounted for.
- ☐ If there has been an injury, make sure that immediate plan for aid is arranged and status verified (minor, serious) before contact is made with parents.
- ☐ Students should be advised to notify parents about any emergency status only after receiving authorization from the trip leader or assigned Harker chaperone, unless the circumstances are so extreme that to not call may cause emotional harm to the student or delay proper care.
- ☐ One chaperone should accompany any student/chaperone who is injured and who must be transported to a health facility to receive care;
- ☐ Other chaperones and students should regroup, and adults decide whether to move forward with intended plans, wait at a designated spot, or travel as a group to the emergency waiting area. Be certain to attend to the emotional needs of any students affected by the emergency who is otherwise physically unhurt.
- ☐ When it is feasible to do so, contact administration at the school, provide a full update on the situation, and advise if there is anything she/he should do to provide support from the school.
- ☐ If a student becomes too ill to continue the day's activities, but not so ill as to require medical care, a chaperone may be designated to remain at the bus or the most comfortable available accommodation as support for the student.
- ☐ The parent of any ill child should be contacted as soon as it is determined that the child cannot continue with the activity, and be requested to come and pick up the child to better care for her/him.
- ☐ If they cannot arrive immediately, regular and direct communication with parents remains an absolute necessity.
- ☐ In the case of a general emergency, keeping administration at the school informed may help the school to coordinate parent communication, freeing you to manage your response at the scene.

## Just before returning home/en route

- ☐ Final head count should be made before boarding transport.
- ☐ If there are any delays, inform school administration, who will help make the decision as to how to inform parents.

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## Upon arrival home

- ☐ Make certain students check their seats for any belongings and remove any trash they have created while en route.

## *Applicable to all situations*

- ☐ If releasing students directly to their parents after normal school supervision hours (usually available until 6:00 p.m.) make sure that a chaperone makes direct contact with each parent as they pick up their child.
- ☐ If someone other than a custodial parent is picking up a child that information needs to be provided to the trip leader in advance of the arrival home, or telephone contact with the parent will be necessary before releasing the child.
- ☐ If a parent is late to arrive, a chaperone must wait with the student until the parent arrives. At least one chaperone is to remain at the campus until every student is accounted for.
- ☐ Complete the collection and organization of all receipts for expenses incurred on the trip. Complete and submit the *Request for Reimbursement* located on the *Forms* portion of the Faculty Portal.
- ☐ Depending on the nature of the trip, be prepared to submit photos and notes to the Office of Communication for promotion and publication.
- ☐ Depending on the timing and nature of the trip, also be prepared to submit photos to the division's Yearbook staff.
- ☐ Make sure there is a plan for returning all unused school supplies to their proper storage location as soon as possible upon return to school.
- ☐ If a school vehicle has been utilized, make sure it is free from litter and all supplies that need to be returned to storage, classroom, etc.

## Summary

Yes, this officially is a tome. And yet, there are probably still some nuances/elements that may be missing. If you regularly lead field trips, this may all be second nature to you; but if not, then hopefully this will provide you with helpful information about a wide variety of situations you will encounter when planning and leading a field trip.

The goal is to try and help you prepare so that you can be ready for as many variable situations as possible – and they will occur. This may also prove to be a useful document to have with you “on the road” so you can refer to it as needed, especially if fatigue sets in and you become “forgetful.” Ultimately, it is all about keeping you and our students as safe as possible, freeing you to fully enjoy your off-campus experience together.