

Topic:	Student Excursions
Effective:	January 2023
Review Date:	December, 2026
Cross-Reference:	Administration of Prescribed Medication; Code of Ethics; Criminal Background Check; Day Field Trip and In-School Presentations; Ontario Physical Activity Safety Standards (OPASSE); 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;
Revision Date:	May 2017, June 2018, January 2023
Responsibility:	Superintendent of Education (School Operations)

INTENDED PURPOSE:

The Halton District School Board (“**HDSB**”) 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 HDSB Student Excursions Administrative Procedure is intended to ensure:

- a) Excursions have curricular relevance or a direct relation to ongoing co-curricular or athletic activities sanctioned by HDSB;
- b) equity among HDSB schools and students with regard to enhanced learning experiences;
- c) Excursions offered to students provide reasonable value for cost;

- d) processes are in place to ensure the safety of students and staff involved in Excursions; and
- e) Excursions are offered on an accessible, equitable and inclusive basis, by taking into consideration a wide variety of accommodations, including but not limited to disabilities, religious/cultural-related needs and/or socioeconomic and levels of financial means, in an effort to remove as many barriers as possible to encourage equitable participation by all interested students.

DEFINITIONS:

An **Excursion** is defined as an overnight off-site activity that includes overnight travel and/or accommodation that require students to leave the school for a length of time longer than a day. These activities may or may not include curriculum based studies.

A **Day Field Trip** is an activity which requires students to leave the school for a length of time no 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 for less than a day, these events will be classified as a Day Field Trip. Where these events require students to leave the school for a length of time longer than a day, these events will be classified as an Excursion.

Short-Term Exchanges are defined as opportunities for HDSB 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 traveling together with Supervisors, and have a cultural focus. Short-term exchanges are considered Excursions.

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

An Excursion **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/Chaperones must have a Criminal Background Check with Vulnerable Sector Screening or current Annual Offense Declaration on file with HDSB. At least one Supervisor/Chaperone on every Excursion must be an employee of HDSB. 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.

Non-HDSB Staff Generated Travel is defined as any trip not specifically organized by HDSB staff, regardless of purpose.

Excursions are sometimes arranged over school holidays (e.g. March Break, December Break) 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 HDSB (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.

PROCEDURES:

HDSB 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 educational curriculum, school and/or HDSB specific educational goals.

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. The Student Excursion Costing Form (Appendix “A”) has been prepared to assist with costing out Excursions. The “Excursion Planning Checklist” (Appendix “B”) is intended to assist organizers with ensuring the trip is properly planned and executed.

In order to receive approval from the School Superintendent, staff organizing an Excursion must complete the “Excursion Approval by Superintendent – Application to Undertake an Excursion” (Appendix “C”). The following requirements must be met:

1. General

- a) Excursions remain “proposed” until the required forms are signed by the Family of Schools superintendent and thus the Excursion should not be advertised nor should any money be collected from students until approved by the Family of Schools Superintendent.
- b) HDSB expects that Excursions be offered on an equitable and inclusive basis, removing as many barriers as possible by taking into consideration a wide variety of accommodations, including but not limited to students’ disabilities, religious/cultural-related needs and/or financial means.

- c) Where Excursions are for curricular purposes and attached to a particular course, schools are to ensure alternate provisions which provide for an equivalent learning experience for students choosing not to take part in optional activities.
- d) 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.
- e) Excursions 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.
- f) HDSB reserves the right to exclude students whose pattern of behavior 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.
- g) **Trip cancellation and out-of-country medical insurance is mandatory on all Excursions that are more than one day in duration.** Trip cancellation insurance must be purchased from the travel provider. Where available, trip cancellation policies that afford coverage in the event of cancellation for “any reason” must be selected. This ensures consistency if the service provider and/or HDSB 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. Where students do not have health insurance coverage under an extended health insurance plan, health insurance must be purchased from the travel provider. Proof of health insurance must be provided to HDSB before traveling.
- h) Failure by a student or a parent (where the student is a minor) to purchase cancellation insurance or to provide proof of health insurance, as stipulated above, may result in the cancellation of the student’s participation in the Excursion, regardless of any costs or expenses incurred on behalf of the student in connection with the Excursion.
- i) HDSB staff must outline to participants and include details outlining the cost of travel, as well as the cost of mandatory trip cancellation and health insurance. **HDSB reserves its right to cancel travel where to do so would be in the best interests of student travelers and the broader school community. Under no**

circumstance will HDSB assume any responsibility for any financial loss incurred by participants as a result of canceled or interrupted travel.

- j) Excursions must be arranged using a reputable travel provider or tour operator that is registered with the Travel Industry Council of Ontario (“**TICO**”).

2. Costs

- a) HDSB 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.
- b) Excursions, be they curricular, co-curricular, cultural or athletic in nature, must provide reasonable value for cost and meet HDSB’s expectations regarding equity and inclusion 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.
- c) HDSB staff are expected to seek payment terms that are most favorable to students (i.e. minimum deposits, payment schedules that defer payment closer to travel).
- d) All money collected and disbursed related to Excursions must be handled in accordance with HDSB 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.
- e) 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.
- f) HDSB expects that the cost to students for Excursions will accurately reflect all incentives being offered by service providers, with the exception of free transportation and accommodation during an Excursion, Any incentives offered by travel companies or hotels must be used to directly benefit the students taking part in the Excursion.
- g) Supervisors/Chaperones participating in Excursions 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.

- h) Excursions remain “proposed” until the required forms are signed by the Family of Schools superintendent and thus the Excursion should not be advertised nor should any money be collected from students until approval is granted.

3. Transportation

- a) When Excursions do not involve flights, a bus is the preferred method of student transportation. Bus/Car Manifest - Appendix “F”
- b) Coach bus rentals for Excursions must be made using a Halton Student Transportation Services approved operator or a reputable travel agency who is registered with the Travel Industry Council of Ontario (TICO). Renting vehicles to transport students is not recommended.
- c) 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.
- d) Permission forms must clearly indicate the type of transportation that will be used throughout the Excursion so parents are aware and provide permission.

4. Supervision

- a) At least one Supervisor on every Excursion must be an employee of HDSB.
- b) 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.
- c) The ratio of staff Supervisors/Chaperones to students on an Excursion should be decided with the following considerations in mind:
 - i. inherent risk factors based on destination and activities
 - ii. number of students participating
 - iii. age and maturity of students
 - iv. familiarity, or lack of familiarity, with the trip experience/environment (e.g., different language, culture, laws)
- d) Non-HDSB 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.

5. Safety

- a) HDSB will not approve 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, Ontario Physical and Health Education Association (“OPHEA”) Safety Guidelines, Water-based Activities - Swimming, Activities In/On Water, and Considerations for Activities Near/Overwater administrative procedure, etc).
- b) Where elements of risk are evident, school staff planning the trip, as well as contracted travel companies, must 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.

1. HDSB expects each HDSB staff member planning an Excursion to:

- a) 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.
- b) 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 only 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.]
- c) Ensure compliance to all relevant HDSB administrative procedures and OPASSE Safety Standards including the identification of the need to complete a swim test.
- d) Ensure proposed Excursions are costed out using a reputable travel agency who is registered with the Travel Industry Council of Ontario (TICO).
- e) Ensure mandatory trip cancellation insurance is included for all Excursions that are more than one day in duration and ensure that students have purchased health insurance or are covered by a comparable extended health insurance plan. HDSB staff must outline and include details of the cost of travel, and the cost of mandatory cancellation and health insurance. Where available, trip cancellation policies that

afford coverage in the event of cancellation for “any reason” must be selected.

2. HDSB expects each school Principal considering Excursions to:

- a) 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.
- b) Critically reflect on the issue of accessibility/equity/inclusion and the following guiding principles before approving an Excursion, taking into consideration:
 - i. parent and student interest and commitment to the out-of-school experience;
 - ii. awareness of and respect for the financial and educational priorities articulated by the school community in relation to the Excursion;
 - iii. overall, and reasonable, value for cost, including mandatory trip cancellation and health insurance; and
 - iv. Excursions are offered on an accessible/equitable and inclusive basis, by taking into consideration a wide variety of accommodations, including but not limited to disabilities, religious, cultural, related needs and/or varying socioeconomic and levels of financial means, in an effort to remove as many barriers as possible to encourage participation by all interested students.
- c) Ensure mandatory trip cancellation is included for all Excursions that are more than one day in duration. Ensure that students have purchased mandatory health insurance or have shown proof of comparable coverage through an extended health plan. HDSB staff must outline and include details of the cost of travel, and the cost of mandatory insurance. Where available, trip cancellation policies that afford coverage in the event of cancellation for “any reason” must be selected.

3. HDSB expects each Family of Schools Superintendent to:

- a) Review the details submitted on the *Excursion Approval by Superintendent Form* prior to approving or denying any requests for student Excursions, as well as ensure mandatory travel cancellation insurance is included in the submitted Excursion details.
- b) Ensure the school principal and staff organizing the Excursion are aware and understand that HDSB reserves its right to cancel travel where to do so would be in the best interests of student travelers and the broader school community. Under no

circumstance will HDSB assume any responsibility for any financial loss incurred by participants as a result of canceled or interrupted travel.

- c) Ensure mandatory trip cancellation insurance is included for all Excursions that are more than one day in duration. HDSB staff must outline and include details of the cost of travel, and the cost of mandatory cancellation insurance. Where available, trip cancellation policies that afford coverage in the event of cancellation for “any reason” must be selected.
- d) Ensure every student has purchased health insurance or has comparable coverage through an extended health plan.

4. Upon approval of the Excursion, the HDSB expects the appropriate school staff to:

- a) Arrange and host Information Nights (see, Excursion Parent Info Night Form, Appendix “D”) and generate permission letters (see, Student Excursion Permission Form, Appendix “E”) using the Excursion information submitted and approved. At the Information Night, all pertinent details of the Excursion will be detailed including costs, payment schedules, method of payment (School Cash Online, Cheque, Cash), Supervisor/Chaperone requirements.
- b) Mandatory insurance must be addressed and highlighted in detail at the information nights to ensure participants/families have a clear understanding that mandatory insurance is a condition of participation. In addition all participants must be informed that HDSB reserves its right to cancel Excursion travel where to do so would be in the best interests of student travelers and the broader school community. Under no circumstance will HDSB assume any responsibility for any financial loss incurred by participants as a result of canceled or interrupted travel.
- c) 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 a reputable travel/tour agency who is registered with the Travel Industry Council of Ontario (TICO) providing Excursion services.
- d) Pay invoices related to the Excursion in a timely manner.
- e) Ensure timely and situation appropriate communication with students and families to best prepare them for the Excursion location and events.
- f) Ensure all relevant medical and emergency contact information is collected from

families.

- g) 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).
- h) Ensure all participants are aware that HDSB reserves its right to cancel travel where to do so would be in the best interests of student travelers and the broader school community. Under no circumstance will HDSB assume any responsibility for any financial loss incurred by participants as a result of canceled or interrupted travel. Failure by a student or a parent (where the student is a minor) to purchase cancellation insurance or to show proof of health insurance, as stipulated within the administrative procedure, may result in the cancellation of the student's participation in the Excursion, regardless of any costs or expenses incurred on behalf of the student in connection with the Excursion.

5. All HDSB staff must follow HDSB financial expectations while on Excursions:

- a) Invoices for expenses incurred while on an Excursion must be submitted to the appropriate office staff accompanied by a Request for Funds Form.
- b) 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.
- c) 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. A copy of the Excursion Approval by Superintendent Form must be submitted to the Accounting Analyst in Business Services to facilitate payment.
- d) 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.

- e) 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.

NON-HDSB STAFF GENERATED TRAVEL

- a) Non-HDSB Staff Generated Travel is not supported in any way by HDSB.
- b) No HDSB 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 an HDSB email account.
- c) HDSB property will not be available for any organization promoting this type of travel.

[Appendix "A" Student Excursion Costing Form](#)

[Appendix "B" Excursion Planning Checklist](#)

[Appendix "C" Excursion Approval by Superintendent](#)

[Appendix "D" Excursion Parent Information Night](#)

[Appendix "E" Student Excursion Permission Form](#)

[Appendix "F" Excursion Bus/Car Manifest](#)