

FIELD TRIP CHECKLIST

School: _____

Date(s) of Trip: _____

Trip Destination: _____

Organizing Staff Member: _____

The following list assists the sponsoring staff member through the field trip process. Please see procedures for specific information regarding each item.

Date Completed:	Step 1: Initial Planning (8 weeks before trip, 6 months for International Travel) *See School Sponsored Field Trip—Preliminary Approval Form
	Determine and document the educational benefit of the field trip (curriculum-related study, interscholastic athletics, and co-curricular activities)
	Develop a description of all activities; include transportation, housing, and eating plans; list unusual aspects of the trip; include all related brochures
	Estimate the planned number and ages of participating students and chaperones needed
	Determine proposed costs and funding
	Develop a preliminary itinerary of activities
	Identify if the field trip has special hazards, including on/in/near water, in remote locations/hiking, involving animals, and/or outdoor education; avoid high-risk activities
	Review field trip plan with principal
	Secure principal’s preliminary approval to conduct the field trip, and to conduct fundraising if applicable (seek school board approval for fundraising if needed)
	Submit to superintendent or school board for approval if needed (for overnight or international travel)
	Receive preliminary superintendent or school board approval
	Review procedure for fundraising, and develop a plan including fundraising activities, a plan for assisting the students who are unable to pay their own expenses, and a method for returning funds if not used for the trip
	Step 2: Detailed Planning (3-8 weeks before trip, 6 months in advance for International Travel)
	Contact place(s) being visited to make preliminary arrangements (if needed)
	Evaluate the field trip site for potential hazards, special requirements of location and activity, and accommodations
	Review all contracts and insurance requirements; ensure insurance for out of country field trips (the principal reviews and signs any contracts and all forms)

	<p>Arrange for transportation:</p> <ul style="list-style-type: none"> • If school bus or van, submit request to transportation • If other, check with risk manager/safety officer for guidelines
	<p>Arrange for housing and assess suitability of housing (if overnight stay); consider same sex sleeping needs</p>
	<p>Arrange for food services (if needed)</p>
	<p>Develop a detailed itinerary</p>
	<p>Identify risks associated with this field trip</p>
	<p>Address unusual aspects of trip with risk manager/safety officer</p>
	<p>Determine adult supervision needed and arrange for chaperones:</p> <ul style="list-style-type: none"> • Ensure adequate number based on the type of activities planned and the age of the students for developmental appropriateness; ratio approved by school administrator • Ensure qualified for special needs (first aid trained, lifeguard, etc.) • Ensure criminally screened • Ensure they received district chaperone guidelines • Overnight chaperones must be approved by HR prior to the trip
	<p>Arrange for needed equipment and supplies, including emergency equipment</p>
	<p>Meet with school nurse to plan medication needs/dispensing for students; arrange for distribution of special medications on the field trip (trained staff and secured medications)</p>
	<p>Assemble parent information/permission packet:</p> <ul style="list-style-type: none"> • Letter home to parents • Detailed itinerary of activities • Permission forms (informed consent, emergency treatment, medical conditions) • List of things students can and cannot bring, appropriate dress
	<p>If academic competition is involved, submit to principal for approval:</p> <ul style="list-style-type: none"> • Written criteria and guidelines used to select participants in academic competitions • Written communications used to inform parents and students of the academic competition and of the governing guidelines
	<p>Obtain final administrative approval</p>
	<p>If a substitute is required, submit request to principal</p>
	<p>Arrange an informational meeting for parents (for overnight or International travel)</p>
	<p>Arrange for supervision of students who opt out of the field trip</p>
<p>Step 3: Final Arrangements (2 weeks before trip)</p>	
	<p>Provide field trip information to parents including:</p> <ul style="list-style-type: none"> • Letter home to parents • Detailed itinerary of activities • Permission forms (informed consent, emergency treatment, medical conditions)

	<ul style="list-style-type: none"> List of things students can and cannot bring, appropriate dress
	Provide orientation for chaperones, and ensure adequate supervision will be available
	Confirm transportation
	Confirm housing (if needed)
	Confirm food services (if needed)
	Confirm arrangements with place(s) to be visited (if needed)
	Confirm availability of needed equipment and supplies
	Confirm arrangements for special medications
Step 4: Final Checks (Day of Trip)	
	Confirm there is adequate adult supervision for the trip; check the number and types of chaperones
	Check attendance
	Ensure adequate transportation
	Ensure parental permission is obtained and emergency information is available: <ul style="list-style-type: none"> Every student has returned the parent permission/emergency medical form Provide the school office with a copy of the signed field trip permission form/emergency medical form for each student (the original of these forms stay with the field trip organizer)
	Review behavior and safety standards with students and chaperones before departure, including: <ul style="list-style-type: none"> Reinforce school rules and expectations The system of accounting for students and the use of the buddy system Review emergency procedures (for injury, accident, or inappropriate activity) Explain what to do if a student gets separated or lost from group
	Check emergency supplies and essential items for the trip
	If special equipment or clothing is needed for each student, ensure that it is provided
	Get medication for students from the office and ensure medications are secured
	Make sure that staff/chaperones on the field trip have a 24 hour phone number for administrators, and the school office/administrator has (cell) phone number of staff on the trip
Step 5: After Trip Evaluation	
	After the field trip, evaluate field trip procedures and the activities involved to ensure field trips in the future are safe
	Keep all field trip records per the retention schedule (6 years) including, but not limited to:

	<ul style="list-style-type: none">• Notices and announcements;• Sign-up sheets, rosters, registration forms;• Parent/legal guardian permissions (approval for use of private vehicles, waiver of liability, emergency information, etc.);• Chaperone/driver lists and information;• Transportation arrangements (including bus trip requests/authorizations, ticket logs, private vehicle checklists, etc.).
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