



## Category III – Out of Province and Out of Country Trips

Responsibility:	<i>Coordinating Superintendent, Business Services &amp; Treasurer of the Board</i>
Legal References:	<i>Travel Industry Act, 1974, Education Act R.S.O. 1990</i>
Related References:	<i>Administrative Procedure 1590 - Transportation - Off-Campus Administrative Procedure 4360 - Principles of Business Conduct For Board Employees FS-18-OC1 – Approval Request Package FS-18-OC2 – Consent and Medical Form FS-18-OC3 – Student Behaviour Expectations FS-18-OC4 – Lead Teacher Checklist FS-18-RS4 – Volunteer Driver – Authorization to Transport Students <u>Recommended Consent Letter For Children Travelling Abroad</u> Waterloo Region District School Board Off-Campus Excursions – <u>Approved Vendor List</u> <u>Government of Canada – Travel Advice and Advisories Website</u> <u>Ontario Physical and Health Education Association (Ophea) Safety Guidelines</u></i>
Effective Date:	April 2, 2018
Revisions:	November 2018
Reviewed:	April 2022

### 1. Preamble

- 1.1 The procedure that follows provides guidelines and expectations for the selection and approval of off-campus activities, and the responsibilities of the Principal or designate. The nature of, and procedure for Category III - Out of Province and Out of Country Trips are given, and guidelines as well as, the responsibilities of the Waterloo Region District School Board (Board) and the Approved Vendor(s) to ensure a successful excursion.
- 1.2 A Category III – Out of Province and Out of Country trip is an excursion endorsed by the Board lasting more than one day outside of Ontario, as well as any trip within Ontario using air transportation as part or sole mode of transportation. A Category III trip will also include extra-curricular activity trips as described above, for excursions related to sports, DECA, robotics etc.
- 1.3 It is important for students to be able to relate what they learn in school to a larger context. Learning is enhanced when skills, knowledge and attitudes are taught in the context of the real world. Off-campus experiences provide that context.

## **2. Guiding Principles**

- 2.1 Category III trips should be directly linked to specific expectations of the Ontario Ministry of Education Curriculum.
- 2.2 Disruptions to the student's regular learning environment should be minimized.
- 2.3 The benefits of a Category III trip should enhance the learning that would have normally occurred in the regular learning environment.
- 2.4 Appropriate measures shall be taken to ensure the safety of students/staff, as well as limit risk to the Board.
- 2.5 Efforts should be made to provide students with equity of access to off-campus excursions. Category III trips will adhere to the Board's Strategic Plan by providing experiential learning opportunities.

## **3. Guidelines for the Selection and Approval of Category III Trips**

- 3.1 It is the responsibility of all staff to ensure that every possible precaution is taken to ensure the safety of our students and staff when travelling.
- 3.2 There must be clear curriculum outcomes for the activity. For Category III trips, these expectations should be formatted as demonstrated in the Curriculum Expectations. These outcomes/expectations should be listed from related Ontario Ministry of Education curriculum documents.
- 3.3 The location for the activity must be both relevant in terms of requisite learning, and appropriate in terms of accessibility, cost, and uniqueness of the site. Schools are encouraged to select more local destinations if the same learning can occur.
- 3.4 There must be demonstrated pre-, during- and post-learning activities consistent with the specific expectations of the Ontario Ministry of Education Curriculum.
- 3.5 There should be an expectation that all eligible students attend to satisfy the learning outcomes articulated for the activity.
- 3.6 Category III trips should be planned in such a way as to ensure that students do not miss more than five (5) consecutive school days.
- 3.7 There must be meaningful alternative activities which are consistent with the outcomes provided for non-attendees.
- 3.8 All excursions are considered off-campus and should be supported by the completion of the appropriate forms.
- 3.9 The school must consult the [Government of Canada – Travel Advice and Advisories](#) website. Only countries with a designation of "Exercise Normal Security Precautions" will be considered as destinations. See Section 8.2 and 9.0.

## **4. Curriculum Rationale**

- 4.1 Students' school related experience include program content and all activities and experiences derived from it; learning resources; teaching strategies; procedures relating to discipline and evaluation; and the interactions of students, staff, and others in the course of school activities.

- 4.2 Curriculum also includes experiences that derive from social interaction in the classroom, the school, and the community at large. Peer relationships and informal interactions with school staff and community members have an important bearing on students' attitudes and values. Such interactions occur in a variety of settings, including the classroom, halls, lunchroom, playground, and school bus, and during co-curricular activities.
- 4.3 It is important for students to be able to relate what they learn in school to a larger context. Learning is enhanced when skills, knowledge and attitudes are taught in the context of the real world. Off-campus experiences provide that context.

## **5. Financial Expectations**

- 5.1 The location for the activity must be both relevant in terms of requisite learning, and appropriate in terms of accessibility, cost, and uniqueness of the site. Schools are encouraged to select more local destinations if the same learning experience can occur.
- 5.2 Staff should not charge any expenses to their personal credit card or bank account unless the staff member is dealing with an emergency situation. If emergency expenses are incurred, the teacher is to file a claim through the insurance provider purchased from the travel vendor.
- 5.3 School staff is required to disclose to parents in writing, all trip and/or travel incentives (monetary or otherwise) being received as a result of their involvement and/or participation in the current excursion, as compensation for their services. This includes the receipt of a trip without charge or funds to cover occasional teachers during the lead teachers' absence. Such benefit(s) must be used during the current excursion, only. To ensure transparency, accountability and adherence to Administrative Procedure 4360 – Principles of Business Conduct for Board Employees, no future incentives or gratuitous benefits are allowed.
- 5.4 Coordinating Council approval should be obtained prior to purchasing flights/booking hotels and/or securing excursions.
- 5.5 Once the Category III trip is approved by Coordinating Council then all payments must be paid directly to the Approved Vendor(s) only. These payments include but are not limited to trip fees, insurance and gratuities.

## **6. School-Based Planning for Category III Trips**

- 6.1 It is essential that schools enter a planning process when considering Category III trips. Through appropriate planning, schools can ensure that the Board off-campus guiding principles in Section 2 of this procedure are met.
- 6.2 Measures must be undertaken to ensure all students wishing to participate have equitable access to these experiences. This may be achieved by providing sufficient time for students to save for the trip and/or by undertaking appropriate fundraising activities at the school.

## **7. Roles and Responsibilities**

### **7.1 Lead Teacher**

It is the responsibility of the Lead Teacher to act in a professional and appropriate manner at all times similar to that of a "Reasonably Prudent Parent". As well, the Lead Teacher will complete the following:

- Ensure Principals are apprised of the trip at all steps in the planning process;
- Determine trip destinations based on curriculum outcomes in consultation with department head;

- Ensure the location for the activity is both relevant in terms of requisite learning, and appropriate in terms of accessibility, cost, and uniqueness of the site. Schools are encouraged to select more local destinations if the same learning experience can occur;
- Select appropriate itinerary from Board approved, Travel Industry Council of Ontario (TICO) registered vendor list;
- Complete all required documentation in the Category III - Approval Request Package;
- Complete 'Lead Teacher Checklist' prior to departure;
- Follow safety requirements outlined in the OPHEA Safety Guidelines and risk management processes and requirements;
- Obtain and retain swim testing when applicable water activities taking place (see Section 10.9);
- Ensure no swimming in water without appropriate swim testing, ie, hotel pools;
- Ensure trip appropriate travel insurance, medical coverage and trip cancellation insurance is purchased for all students, teachers and volunteers;
- Ensure all procedures related to the medical needs of students have been considered;
- Follow Administrative Procedure 1415 – Use of Volunteers for any non-board employees;
- Acknowledge in writing that you have read and understand Administrative Procedure 4360 – Principles of Business Conduct for Board Employees;
- Adhere to the Standards of Practice and ensure that other chaperones are adhering to the Standards of Practice; Note: As an extension of your school, an approved Category III Trip is a Board Sanctioned Event and therefore all Board Policy and Procedures apply;
- Ensure that all payments, including gratuities will be directed to the Approved Vendor;
- All Category III trips must occur during the regular school year (between the first day of school and the last day of the school year);
- Ensure trip is not planned on Board PA Days and Exam Days (field trips and extra-curricular activities);
- Ensure the itinerary does not allow for unsupervised free time on the trip;
- Ensure appropriate supervision is in place during sleep periods;
- Prepare all communications for parents/guardians; and
- Prepare to host a student/parent/guardian meeting to discuss and promote the trip.

## 7.2 Approved Vendor

It is the responsibility of the Approved Vendor to complete the following:

- Maintain certification as an Ontario Licensed Travel Agent under the Travel Industry Act, 1974;
- Maintain appropriate general liability insurance as well as legislative and certification requirements;
- Complete the Vendor Checklist (page 4 and 5 of the approval package) prior to departure;
- Ensure trip appropriate travel insurance, medical coverage and trip cancellation insurance are in place for all students, teachers and volunteers and include in the cost and details provided in the Lead Teacher's package;
- Arrange payments, payment plans and any other related transactions on behalf of the trip for the student/parent/guardian;
- Provide a qualified tour director/guide at all times;
- Prepare and provide a session for students prior to departure to review trip safety and security
- Provide payment for costs related to occasional teacher coverage once invoiced by the WRDSB.

## 7.3 School Principal

Principals are responsible for developing and maintaining an annual school plan for Category III – Off Campus Trips. This plan is an internal document and will include:

- Listing of all Category III - Off Campus Trips that the school intends to endorse;
- Approximate number of students involved in each trip;

- Approximate cost per student;
- Efforts made to increase opportunities for all students to participate.

It is the responsibility of the Principal to complete the following prior to approving the Category III Approval Request Package to Coordinating Council:

- Share Administrative Procedure 1581 – Category III – Out of Province and Out of Country Trips with applicable staff;
- Ensure the trip has been coordinated with a Board Approved Travel Vendor;
- Ensure the Board’s guiding principles and curriculum expectations will be met;
- All Category III trips must operate during the regular school year (between the first day of school and the last day of the school year);
- Ensure trip is not planned on Board PA Day or Exam Days (field trips and extra-curricular activities);
- Ensure all applicable forms will be submitted prior to the departure of the trip;
- Ensure, through advanced planning, that efforts are made to increase opportunities for all students to participate in off-campus excursions;
- Consult the Government of Canada – Travel Advice and Advisories Website. Only countries with a designation of “Exercise Normal Security Precautions” will be considered.

#### 7.4 Education Centre - Administrative Services

- 7.4.1 If the Category III trip has been approved by the Principal, the Principal will submit to the appropriate Superintendent, Student Achievement & Well-Being, the proposed Category III Trip Approval Request Package at least eight (8) months prior to the proposed departure date.
- 7.4.2 If curriculum expectations and other trip criteria have been approved by the Superintendent, Student Achievement & Well-Being, the package will be forwarded to the Coordinating Superintendent, Business Services & Treasurer of the Board who will submit the package to Coordinating Council for review and approval.
- 7.4.3 Central approval (Superintendent, Student Achievement & Well-Being, Coordinating Superintendent, Business Services & Treasurer of the Board and Coordinating Council) usually takes 6 to 8 weeks from the date of receipt at the Education Centre.  
Note: Approval from Coordinating Council should be obtained prior to purchasing flights/booking hotels.
- 7.4.4 Board office administration will communicate back to the school indicating approval status and next steps.
- 7.4.5 A Google folder will be created to store all trip documentation and shared with the Lead Teacher and Principal. Lead teacher will scan all required documentation to this folder.

#### 7.5 School Principal - Following Approval by Coordinating Council

Following approval by Coordinating Council, the Principal will notify the Lead Teacher at which time the Lead Teacher is responsible for the following:

- Inform students/parent/guardian of the out of country trip opportunity. This would include sending appropriate forms home. Trip itinerary should be included in this information.
- Undertake measures to ensure all students, wishing to participate, have equity of access to these experiences. This may include (but not limited to):
  - Providing students with ‘lead time’ (appropriate school-based planning);
  - Minimizing cost through:
    - i) school subsidizing cost;
    - ii) fundraising.

As well, the School Principal will:

- Ensure that the Lead Teacher has submitted all applicable forms, to the shared Google folder;

- Ensure that parent/guardian information nights are held as outlined in the Lead Teacher checklist;
- Keep an annual school plan of all Category III trips including a record of all monies collected by the Board Approved Vendor;
- Maintain a passenger list of students and supervisors for each vehicle; one copy in the school and one copy with the trip supervisor;
- Ensure that all procedures related to the medical needs of students (i.e. epipens) have been considered;
- Ensure that all necessary and outlined procedures have been followed and all safety requirements, including those outlined in the OPHEA Safety Guidelines, have been met, e.g. trail hiking, canoeing, canoe tripping, Alpine (downhill) skiing, snowboarding, backpacking, waterfront activities. Boat rides and water cruises should be limited to essential transportation to a tour-related destination.

**Note:** The use of private automobiles for student transportation is subject to the minimum insurance coverage recommended by the Board (Reference: Administrative Procedure 1590 – Transportation – Off-Campus).

## 8.0 Risk Management

To improve the success of Category III trips the following is in place to mitigate the risk associated with out of country travel.

- 8.1 Only a Board approved, Travel Industry Council of Ontario (TICO) registered travel vendor is used. These vendors must be able to process payments made directly by student/parent/guardian.
- 8.2 The school must consult the Government of Canada – Travel Advice and Advisories Website website. Only countries with a designation of “Exercise Normal Security Precautions” will be considered as destinations.
- 8.3 Lead Teachers and Principals must check the destination’s travel designation prior to submitting the trip package to Coordinating Council. Additionally, the designation must be checked leading up to the trip’s departure to ensure the designation remains as “Exercise Normal Security Precautions.” Should the rating change prior to the trip’s departure, the trip will be cancelled and refunds provided in accordance with the trip agreements between the approved vendor and students/parents/guardians.
- 8.4 Trip appropriate travel insurance, medical coverage and trip cancellation insurance is purchased for all students, teachers and volunteers.
- 8.5 Consent/Medical forms and Student Expectation forms are received from all students prior to departure.
- 8.6 OPHEA guidelines are reviewed, acknowledged and adhered to by all person(s) responsible for the Category III trip.
- 8.7 Contingency arrangements to address unforeseen situations where the excursion may need to be cancelled. These plans should include the refund of deposits already collected.
- 8.8 Category III trip destinations should be selected in a manner that considers equity of access and is inclusive of all students.
- 8.9 Mandatory Police Vulnerable Sector Checks for all non-Board adult chaperones are received by the Lead Teacher within 90 days of departure.

- 8.10 All teachers and adult chaperones must have their Emergency First Aid Training and CPR Certification.
- 8.11 Ontario School Board Insurance Exchange (OSBIE) video and quiz are completed.
- 8.12 Vendor, teacher, parent and student training meetings occur within 30 days of departure to review potential risks specific to destination.
- 8.13 Approval for Category III trips from Coordinating Council should be obtained prior to purchasing flights/booking hotels.

## **9.0 Cancellation**

- 9.1 The Principal, Superintendent and/or Coordinating Council have the authority to cancel a trip if the steps in this procedure are not completed by the date of departure.
- 9.2 If rating exceeds that set out in Section 3.9 and 8.2, the trip will be cancelled.
- 9.3 If and/or when this occurs, the trip will no longer be endorsed by the Board. The Lead Teacher and the Approved Vendor will be notified and all trip preparations will cease and moneys will be returned, less insurance fee(s).

## **10. Supervision**

- 10.1 A supervision plan for Category III trips must be completed prior to the trip and shared at the parents' information meeting. Students must be supervised at all times. Submissions with "free time" or "time on your own" will not be approved.
- 10.2 Infractions regarding inappropriate student behavior will be investigated by a teacher. Consequences will be determined by school discipline procedures.
- 10.3 It is the responsibility of the Principal and teacher(s) concerned to ensure that appropriate supervisor/student ratio for all off-campus excursions is adhered to. This consideration should take into account the specific needs of the students and staff attending the trip.
- 10.4 A supervisor is any person deemed by the teacher and Principal to be sufficiently responsible and able to provide adequate care for the students involved in the activity (i.e. EA's, student teachers, parents, volunteers, co-op students in elementary schools).
- 10.5 All adults accompanying a trip must commit to the standards and expectations associated with supervising students as per this Administrative Procedure and the OPHEA Safety Guidelines. It is expected that these standards are adhered to by supervisors throughout the entire duration of the off-campus excursion.
- 10.6 Non-Board personnel acting as adult supervisors on overnight excursions will be asked to provide a Police Vulnerable Sector Checks prior to the start of the off-campus excursion.
- 10.7 The Lead Teacher and any other teacher(s) attending the trip, as well as other supervisors, are included when calculating the supervisor/student ratio. A minimum of one employee of the Board (teacher; educational assistant; child youth worker; etc.) will be a supervisor involved in the excursion.
- 10.8 Due to the particular uniqueness of special education situations, the supervisor/student ratio will reflect the needs of students. The Principal and teacher(s) concerned must decide upon appropriate ratios for exceptional students.

- 10.9 The following is a chart outlining the maximum ratios between supervisors and students for off-campus trips. The ratios are suggestions and have been developed over the years with the safety of students in mind. The risk associated with individual trips must be considered and it may be appropriate to reduce the ratios between supervisors and students to provide additional supervision to students.



## STAFFING SUPERVISION RATIOS – CATEGORY III

	Junior	Intermediate	Senior
<b>Trip outside Ontario</b>	*	1/15	1/15
<b>Archery</b>	1/8	1/10	1/15
<b>In a pool or in/around a body of water+</b>	1/8	1/10	1/15
<b>Backpacking</b>	*	1/10	1/15
<b>Canoe trip</b>	N/A	1/8	1/10
<b>Winter camping (only allowed in Canada)</b>	N/A	1/15	1/15
<b>Camping (cabins or tents)</b>			
In Canada:	1/10	1/15	1/15
Outside of Canada:	*	1/15	1/15

N/A = Not Allowed

\* = Subject to Approval (e.g. ministry approved "learn to swim" program)

+ = OPHEA Swim Test Required

### 11. Additional Considerations

#### 11.1 The Travel Industry Act, 1974

The Travel Industry Act, 1974 is a statute which governs the Ontario travel industry. All Ontario travel agents must be licensed under the Act. If a licensed agent fails to provide travel services for which the consumer has paid, the individual can claim reimbursement from a compensation fund. The licensing process and the supervision of the compensation fund come under the authority of the Ontario Ministry of Consumer and Commercial Relations.

#### 11.2 School Personnel

While teachers may provide input and be involved in decisions concerning program arrangements and the itinerary of the trip, they cannot become involved in carrying out the 'travel service' arrangements. The travel agent is responsible for expediting all travel business. Teachers may act as helpers in the distribution and/or collection of material.