

Guidelines for safer field trips



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As organizations look to find ways to expand your range of offerings, field trips are often seen as an important way of providing well-rounded experiences and an opportunity to enrich the lives of those that you serve. Field trips expand learning through active hand-on experiences by going out into the “real world” to experience different encounters, increase knowledge and comprehension of a subject while adding realism to the subject.

Unfortunately, the reasons that make these field trips attractive are often the same reasons that can pose some risks to your organization. Because you take those

that you serve away from surroundings that are familiar to them, field trips pose more chances for injuries and exposure to hazards. And should an accident, medical issue, or emergency come up, they are probably easier to deal with back at your facility than in the field.

These drawbacks shouldn't deter your organization however from venturing out on a field trip. On the contrary, it just means that you need to do some good planning, take a few extra precautions, implement a few extra safeguards, and exercise some additional attentiveness to make sure each field trip is a safer one.



Things to consider

Before thinking about a field trip, here are some tips on some of the things you'll probably want to consider. These tips are general in nature however and provide only a basic outline of things to think about when considering a field trip. Each organization is unique nonetheless, and you should also identify and incorporate any specific needs you may have into your own field trip planning.

Before the field trip

Select an appropriate destination

It is important that you study potential destinations before making any trip. Before deciding on a location, look for an experience that supports your organization's mission. Some questions that you may want to consider:

- What will your field trip participants gain from this experience?
- Is this location well-matched with everyone's attention spans and developmental levels?
- Will there be places to sit?
- Will there be long lines?

Once you've made a list of potential locations for your field trip, you should contact each one to learn more about their location, the programs they offer along with any activities they offer. Some sites will have pre-trip informational packets they can send you beforehand to help you better understand what they have to offer. Be sure to find out:

- If they have any admissions costs
- What dates (and times) are available for your group
- How many people they can accommodate
- Any security or admission requirements
- Special needs accommodations
- What your responsibilities are with regard to your group.

If practical, visit the potential locations you've chosen before announcing the trip. Look at it to make sure it is safe and appropriate for your group. Look for slip, trip, and fall hazards, places where someone could get lost and any other potential concerns where someone might be harmed. Visiting the site ahead of time will allow you to become familiar with the location and the opportunity to take some photos to show your participants before the field trip. Some questions about the location should include:

- Does this location meet your expectations for a successful field trip?
- What are the best times to avoid large crowds?



- Are there any hazards such as loose animals, unfenced bodies of water, or stairs/drop-offs without secure railings?
- Is there running tap water?
- Where are the restrooms located?
- Are they handicap accessible?
- Talk to others who have already been there.
 - Did they encounter any issues that you should be aware of?
 - Is there a parking lot or is parking along a busy street?

Ask yourself these and other questions in order to determine foreseeable hazards and the suitability of this location.

Foreseeable hazards of your planned destination

Part of your responsibility in planning a field trip is to analyze the potential for risk at your planned destination. It is not possible to list all hazards for every possible excursion, however for simplicity purposes, you can sort out the potential risks for field trips as to likelihood and make a determination based on the severity of potential risk(s).

Studying and researching a potential field trip site ahead of time will help you choose an appropriate destination. With some careful risk management planning and proper staffing however, these trips can be an enjoyable adventure.

Confirm

Check and make sure that the destination has confirmed the plans you discussed and have sent you an itinerary.

Obtain written consent for each participant

You should distribute a permission form specific to the trip to participant's families to be completed by the parents or guardians. These forms should be sent out well in advance of the trip so that the parents or guardians can read over the form, make arrangements to pay any associated costs and to make arrangements to their own schedules as needed. The permission form should include details about:

- the trip (where you are going and why)
- the date on which it will occur
- the destination and its address
- what participants should wear and bring
- any cost(s), lunch/snack provisions
- the mode(s) of transportation to be used,
- the estimated times of the group's departure and return.

If special skills are needed (e.g. swimming) the skill level of each participant should be verified by the parent/guardian.

In addition to permission to attend, you should also include in the permission form consent for emergency care if required during the trip. Parents or guardians must provide contact information on the day of the field trip so that they can be reached immediately to assume responsibility in the event of an emergency. Make sure the information you take with you is current. Only the participants whose parents or guardians have signed and returned a permission form should be allowed to participate in the field trip.

Assure adequate staffing/supervision for field trip

In order to maintain adequate staffing requirements during travel and at your destination, you must maintain an appropriate ratio of staff-to-participant at all times. Parents/guardians should be welcome to accompany the group and having additional adults around will certainly make the logistics of travel easier for all participants - however, parents should not to be counted as replacements for trained staff.



Your goal in assuring adequate staffing/supervision is to be able to maintain the standard of care needed for those participating on the field trip. The level of staffing/supervision you will need to maintain will be based on a combination of factors:

1. The nature of the activity – what are the foreseeable risk(s) of injury associated with participating in a particular activity?
2. The ability of the participants – What is the degree of difficulty of the field trip activity, the physical strength and endurance needed, coordination and mobility necessary and physical/mental limitations of the participants?
3. The experience of the participants – Is this a first-time experience for the participants, or have they had various degrees of experience/skill beforehand in participating in this type of activity?
4. The age of the participants? You'll need to take into consideration factors such as physical size (height/weight), maturity level, risk perception, comprehension of rules/instructions, etc. which are dependent on age.
5. Applicable environmental factors – What is the site layout (clear sight lines versus obstructions); will your group be dispersed (e.g. walking trails, amusement parks); tour groups versus self-guided, presence of dangerous features (e.g. cliffs, appealing location attractions, unusual weather or environmental phenomenon, etc.)?
6. Regulatory requirements – some organizations will have regulatory staffing requirement ratios that you will need to maintain. You need to be aware of these requirements.
7. The number of participants - The ratio of supervisors to participants after considering all of the preceding factors will determine what staffing/supervision level you will need.

As an organizer of a field trip, and as a reasonable and prudent person, you are expected to take all of these variables into consideration when determining what level of supervision is required for your planned activity. As the field trip organizer, you should always follow any mandated regulations as well as any policies and procedures regarding supervision to assure you are, at a minimum, meeting these requirements. When you do not have sufficient staff and volunteer resources to provide adequate supervision, a field trip excursion should not take place. Your senior management should always reserve the right to cancel an event at any time if supervision or safety requirements cannot be met or are of a concern.

You should also have contingency plans in place to provide supervision for participants who may be injured or become ill (i.e. provide for someone to accompany to hospital or return home). Participants should never be left unaccompanied in this type of situation.



Coordinate transportation that will accommodate your group

As early as possible, you will need to arrange for and reserve transportation to and from the field trip. Most organizations usually have a procedure for organizing transportation for field trips so be certain you check and follow them. You will either use an outside contractor or, if your organization has them, small buses or vans. If you are using buses/vans through your own organization you will need to make sure that the field trip does not interfere with the bus driver's regular scheduled route. Regardless of the type of bus or vehicle you use, you will need to introduce yourself as the field trip leader and need to clearly communicate to the driver the proper addresses and times for pickup and drop off. With private transport, confirm the reservation the day before.

Research your route in advance and discuss it with your driver. When taking your participants on a field trip, make sure you've identified a rest stop along the way. On a long bus ride, work out with the driver where you can make additional rest stops and an emergency stop if needed.

Loading and unloading - Many destinations have a specific place to drop off and pick up participants. Sometimes they are not the same spot. If the information is not provided with a confirmation packet, don't be afraid to ask!

Volunteer recruitment and supervision

Many organizations planning field trips rely on parent or guardian volunteers to assist the staff in supervising the excursions. The emphasis here should be on assist, as you should not have these volunteers in charge of the excursion or be administering discipline to the participants.

While the use of volunteers has many benefits, organizers need to be aware that there are always risks of assault, sexual misconduct, and negligent acts that must be mitigated and managed. Your organization can be held legally liable for any actions of a volunteer that cause injury to a field trip participant or to a third party.

Tips for utilizing volunteers:

- Use a screening process for volunteers that includes at a minimum interview screening and reference checks. For any activities that involve long-term interaction with participants, more thorough background checks are recommended.

- Delineate which activities are suitable for volunteer involvement.
- Promptly investigate any suspicion of inappropriate behavior.
- Ensure volunteers are properly supervised by your staff.
- Create a list of expectations and duties for your volunteer chaperones.
- Give your chaperones the tools they need to succeed. Make nametags for all chaperones and participants. Create a "cheat sheet" of the day's itinerary, special rules, your cell phone number, and the names of all the participants in each chaperone's group. Distribute these sheets to each adult on the field trip. Procure and label (grocery) bags that each chaperone can use to carry the group's sack lunches. Do not allow volunteers to be one-on-one with any participant.



Clearly define trip expectations

To maximize the chances of a positive outcome, you should clearly define the goals for the field trip in a manner that can be understood by the participants. Invest some time by going over details of where you are going, showing photographs or images of where you are going to get participants familiar with your destination and reviewing the details of how the trip would run.

An effective way for you to convey the needed field trip information is to provide your participants with an “age and ability appropriate” orientation prior to departure. The type of field trip will dictate the level of detail needed in the orientation, but you can use both verbal and written communication based on the capabilities of your participants.

Orientation materials might include the following:

- Trip destination and purpose - a travel itinerary - route, rest, and meal stops
- Transportation information - appropriate clothing or gear
- The established rules and protocols specific to the field trip
- Any known unique hazards
- A summary of activities and physical requirements your participants will encounter
- Any known or unusual circumstances that would require advance preparation or equipment

During your orientation meeting you can discuss and provide written documentation (as appropriate):

- Expectations – conditions of participation
- Approved and restricted activities
- Acknowledge risks and realities of field trip site
- Behavioral expectations
- Any zero tolerance issues
- Participant misconduct or threats to the safety of others
- Climate at the field trip site
- Appropriate clothing and gear
- Communication and information resources (phone, walkie-talkies, email, etc.)
- Emergency plans and incident reporting procedures (accidents, theft, problems with staff or other participants, illness, weather delays)
- Emergency contact information
- Cell phones/buddy systems
- Procedures for separation from group
- General safety and personal security
- Overview of the field trip schedule

Again, during travel and at your destination, maintain an appropriate ratio of staff to participant at all times. Parents, guardians and relatives should be welcome to accompany the group however they should not to be counted as substitutes for your trained staff.

Emergency plan

Before you get to your planned destination, you should develop an emergency plan to cover some of the potential situations that might arise. The type of field trip you are planning will determine the level of emergency planning needed. If the trip location is remote, it is strongly recommended that you have at least several persons on the trip that have first aid skills, maybe even wilderness first aid training, a first aid kit, and a cell (or satellite) phone (or other appropriate means of communication in the event emergency aid is needed). You should confirm in advance that cell phones will operate from the field trip site so that alternative arrangements can be made if needed. Also determine a protocol for circumstances that may necessitate one of your field trip leader(s) leaving the group to accompany an injured or ill participant.

You should make sure that you have a completed emergency medical information sheet for each field trip participant and carry a copy of each with you during the trip. This document should be destroyed after the trip is over. You should also have a signed (by the parent or guardian) medical treatment authorization for each participant along with a copy of their medical insurance card. Each participant should have an ID with them during the field trip.

Before you get to your planned destination, communicate what to do if someone gets separated from the group. For example, point out employees in uniform and instruct on how to tell them you are lost or separated from your group. You could also pick a landmark for an emergency meeting place at an outdoor location.

Trip contingencies

Even with the best planning effort, things can still go wrong. You should try to foresee difficulties that could happen, and then develop your contingency plans in advance.

Examples might include:

- A participant needs to leave early because of a personal emergency
- A participant violates established rules
- Weather or transportation that could cause delays or cancellations
- You should understand any contract limitations or restrictions. Will the “unused portion” of pre-paid trip expenses be refundable?



Assemble a safety kit

It is always wise to assemble a first aid kit and to bring along important safety and health materials with you in a safety kit. Designate one of your staff to carry it (in a back pack). Contents can vary based on the needs of your participants, but some of the items you should consider carrying include:

1. Nonporous disposable gloves
2. Assorted sized/shaped adhesive bandages
3. Bandage tape and an assortment of gauze pads or gauze rolls
4. Tweezers
5. Digital thermometer (not made of glass)
6. Cold pack
7. Eye dressing
8. Bottled water
9. Sunscreen
10. Small splints
11. Soap or disposable hand wipes
12. Disposable towels (plastic wrapped)
13. Sanitizing solution
14. Tissues
15. Plastic bags for disposing of soiled materials
16. A simple first aid guide, chart or instructions
17. Any emergency medications potentially needed by participants
18. List of emergency phone numbers, parent/guardian contact information and poison control numbers
19. A functioning mobile phone or two-way radios
20. Compass, maps and/or global positioning systems
21. A pen or pencil and small notepad for taking down emergency notes or instructions
22. Safety pins, shoe laces, needle/thread (in small container), scissors
23. Extra snacks
24. Extra clothing and/or blankets if you're out in cold weather
25. Other items based on the needs of your participants

In addition, carry with you the care plans describing any special needs of those participating in the field trip. For example, if a participant has asthma, the kit should contain the care plan as well as any medications or equipment the participant may need.



Be prepared for potential medical emergencies

In the unlikely event of a medical emergency, it is best for you to be able to calmly respond with a prepared plan rather than scrambling to make decisions. It is best to be prepared.

- You should ask parents or guardians to complete a separate medical emergency form that includes information regarding each participant's health, medical insurance and parent/guardian permission for medical treatment if required.
- These medical emergency forms with parent/guardian consent for treatment should accompany you (in a binder or folder, at the ready) on any trip away from your organization. Another copy of the forms should be kept on file at your facility.
- On every field trip, there must be qualified (i.e., CPR/first aid-certified) adult(s) authorized to administer oral medication, insulin shots, inhalers, EpiPens, and the like. Be aware that over-the-counter medications (pain reliever, antacids, nose spray) also require parental consent and must be labeled by the parent, secured during the trip, and administered by an authorized adult.
- Keep emergency phone numbers, local emergency/paramedic contact information, and directions to the nearest emergency room in one place and with you at all times.
- Ask one adult to drive separately to the venue so there is a car in case of an emergency.
- Make sure staff and chaperones understand all field trip-specific emergency procedures.
- Review any known medical concerns with the staff and chaperones prior to the field trip.

Plan for safe and nutritious food/snacks

If your trip will include a meal or a snack, be sure to prepare the food safely. Perishable items are generally not a practical idea since they will require refrigeration or packing them in ice. If your destination doesn't offer drinking fountains, your participants will need to carry water to drink to prevent dehydration. The ability of your participants to carry their own backpacks or lunch sacks will depend on their ages and developmental levels. At the very least, for a short trip, a nutritious snack should be carried by the adults and distributed at the appropriate time.

Final check

Assemble paperwork (into a single binder) you will be taking:

- Signed permission forms
- Signed participant emergency medical information and insurance form
- Signed informed consent forms
- Parent/guardian emergency contact information for the day of the trip
- Extra money in case of an emergency
- Emergency contacts for each site
- Itinerary
- List of all participants, staff and volunteer chaperones
- List of any participants that must take medications during the trip

For those not going on the field trip, make alternative arrangements. Ideally, everyone will attend the trip because it is part of the planned day. However, some will not be able to attend, for various reasons. Make sure that you provide these individuals with fun, supervised activities to engage them and provide them with a similar experience or make alternative arrangements.

During the field trip

Have an accurate roster of participants

A precise list of participants who have signed in on the day of the field trip is vital. You should use this list to perform repeated exact headcounts throughout the field trip day. Count the participants as they leave your facility, once they are in the vehicle(s), as they exit the vehicle(s), and when they get to the field trip location. The roster should allow for a parent or designated contact to sign out a child during the trip if necessary.

Be certain to count all day. In watching out for the participants, you, your staff and chaperones will likely spend most of the day counting heads and making sure everyone is accounted for. Obviously, one of the worst things that can happen on a field trip is losing a participant. So you should have everyone count accurately and often. Even though chaperones will help in this task, do it yourself too, for your own peace of mind. Keeping track of each and every participant is the number one priority of field trip day.

Make sure you know exactly how many you are responsible for and do headcounts regularly. If anyone is missing, act immediately.

Identification

Create a way to easily identify your group at a glance. Hand out name tags to everyone. Some organizations use colored T-shirts, but they can become costly. Another way is to use "field trip badges". These brightly colored stickers with your organization's name on them identify your field group participants as being part of your group. Readily visible identification of the participants in your group is especially helpful where there are many groups of young children present. Additionally bring photo identification cards with each participant. If they do not have photo identification cards, you can easily make one with a digital snapshot bearing the needed identification information. Should any of your participants have special needs, consider providing each with a card that they carry with them with vital information along with describing their needs and what to do.

Use appropriate vehicle restraints

Since motor vehicle crashes are the leading cause of death and injury for all children you must use appropriate vehicle and child safety restraints. These child restraints, or car seats and booster seats, significantly reduce the risk of injury and reduce the risk of death in comparison to children in seat belts alone.

All vehicle occupants need to be properly restrained by seat belts or child safety seats to prevent injury in case of a sudden stop, swerve or crash. Seat belts and car seats contact the strongest parts of the body, spread crash forces over a wide area, help slow down the body and protect the brain and spinal cord.

If your trip requires traveling in cars or vans, each participating child must travel in a car safety seat or booster that is appropriate for their age and weight. These seats vary greatly from rear to forward facing child seats, booster seats, to the vehicle's safety belts. Detailed information can be found at either <http://nhtsa.gov> or at <https://www.safercar.gov/parents/CarSeats>





Maintain basic hygiene during the field trip

You should maintain basic hygiene during the field trip. Practice handwashing prior to eating, even when you are away from your site. It may be necessary to carry hand wipes to accomplish this, if there is no access to clean running water on your trip.

Pair up participants in a “buddy system”

There is a reason this age-old system is still around - it works. Pair up your participants so they have a partner to be in contact with. Talk about what to do if they can't find your partner. Make sure each pair of “buddies” are placed with an assigned chaperone.

You should establish a meeting time (or several during the day) and place to do a headcount and help keep everyone on schedule.

Facilitate personal safety

Unfortunately, with any field trip, there is an increased danger—however rare—of the unthinkable: that a participant could get abducted, assaulted, robbed, injured, or lost. That doesn't mean you should stop going on field trips. It does mean that you need to take some additional precautions. Remember that people get excited on field trips. They may wander away to explore something on their own; they may get distracted; they may even do something risky or without thinking.

You can reduce this risk by establishing rules, policies, and procedures before the trip:

- Your participants must be supervised by an adult at all times (keeping in mind that if the adult can't see them, they are not supervising them).
- Enforce your buddy system that prohibits any participant from going anywhere alone.
- Depending on age levels, adults may accompany participants to the restroom. (At a rest stop with stalls, it makes sense to station a same-sex adult inside the restroom and another adult outside the restroom until everyone has used it.)
- Take attendance when your group boards their

transportation, disembarks, and at other intervals throughout the day.

- Be sure participants know what to do if they get separated from the group.
- In the case of higher risk excursions (like camping, hiking, boating, or other outdoor expeditions), participants should have whistles and/or cell phones.

Dangerous behavior

Preventing behavioral issues is so much easier than dealing with behavioral issues. Here are some steps you can take to help ward off some problems before they occur.

- Provide sufficient supervision depending on the maturity and developmental level of your participants. In general, for school age participants, a higher ratio of adults to children will usually be required than with high school age participants. At a minimum, follow applicable supervision ratio regulations but it may be helpful for you to go beyond minimum requirements as an added measure. If you know you have participants who are behaviorally challenging, consider adding more chaperones.
- Before the trip, communicate behavioral expectations to staff, parents/guardians, and chaperones. Make it clear that any rules that apply at your facility automatically apply on the field trip (i.e., no roughhousing, horseplay, fighting, property damage, or dangerous behavior). Also explain that, on a field trip, participants may be expected to adhere to heightened restrictions and expectations. For example, participants may not wander away from the group, they have to stick with an assigned “buddy,” and they're expected to follow any additional rules that have been established during the trip and at the venue. Many organizations ask participants and parents to enter into a “behavioral contract” that outlines specific expectations for the field trip.
- Enforce the rules. Be prepared to take organizationally-sanctioned action when a participant violates the contract (i.e., breaks rules, is overtly defiant, or does anything dangerous, illegal, or destructive).



After the field trip

Post-field trip activities

Just as quality pre-planning is essential to the success of a field trip, planning for appropriate follow-up activities will facilitate learning and multiplies the value of hands-on experiences outside of your organization. Consider:

- Providing time to share general observations and reactions to field trip experiences
- Create a bulletin board displaying materials developed or collected while on the field trip.
- Develop a “museum” that replicates and extends displays observed on the field trip. For example, if the field trip involved an art museum, develop an art museum containing participants’ artwork.
- Write thank-you notes after the field trip. Depending on the maturity and developmental levels of your participants, you may want to lead them the day after your field trip in formally thanking the people who hosted your group. This serves as an etiquette lesson for your participants, and helps form your organization’s good reputation at the field trip destination. In future years, this goodwill could translate into prime perks for your organization.
- It is also important, with your staff, to document any injuries, illnesses, behavior or other activity that occurred during the trip. This would include the name(s) of the participant, staff member, volunteer and any witness(es).

Do a debriefing with your staff, chaperones and participants

- Do a “debriefing” when you return to your facility – if you have a few extra minutes after the field trip and before the end of the day, briefly review with the

participants what they saw and learned that day. This gives them a chance to decompress, unwind and review what they experienced. The next day you may want to do a more active and in-depth review of the field trip, the field trip material, extending the learning further and connecting it to what you’ve been discussing with the participants.

- Complete a “Field Trip Journal” regarding the field trip. This will provide a good reference for future field trips.
 - What was of unique educational value in this field trip?
 - Did the participants meet the objectives/expectations?
 - Was there adequate time?
 - Was there adequate staff and adult supervision?
 - What might be done differently to make this an even better experience in the future?
 - What special points should be emphasized next time?
 - What special problems should be addressed in the future?
 - What would improve a visit to this site in the future?
- Record any other thoughts you might have about this trip - high points, tips to remember, great contacts - for your field-trip file. This way, you’ll have information to use another year and to share with other field trip leaders.

When you consider all the things that could possibly go wrong on a field trip, you may be wondering whether they’re worth it. They are. Field trips can enrich your organization’s offerings, enhance learning, and energize participants to stretch and grow. And with careful planning, adequate staffing, and good communication, your field trip can be safe and successful from beginning to end.

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