

## Educational Excursions Procedure

### RATIONALE:

Hamilton-Wentworth District School Board (HWDSB) is committed to ensuring a quality education for students which includes the opportunity to participate in educational excursions.

### TERMINOLOGY:

*At-Risk Students:* The Chairs of the Expert Panels on Students at Risk in *Building Pathways to Success: The Report of the Program Pathways for Students at Risk Work Group*, Toronto, 2003 defined At-Risk students as:

- Elementary students who are performing at level 1, or below grade expectations.
- Secondary students who would have studied at the Modified or Basic level in the previous curriculum.
- Secondary students who are performing significantly below the provincial standard, earning marks in the 50s and low 60s and who do not have the foundations to be successful in the new curriculum.
- Students who are disengaged, with very poor attendance.

*Additional Insured:* Means an individual or organization that is added to an insurance policy in addition to the main policyholder.

*Additional Named Insured:* Means an individual or organization identified as an insured on the policy added to an existing policy of insurance paid for by another entity.

*Certificate of Insurance:* A document issued by an insurance company or broker, that is used to verify the existence of insurance coverage under specific conditions granted to listed individuals.

*Educational Excursion:* An educational excursion is any approved and supervised activity or program, off school premises. The Educational Excursion Policy describes an educational excursion as “an educational learning experience for students that takes place outside their school campus, designed to enhance and enrich the overall educational experience, and linked to the curriculum and/or HWDSB strategic directions. Educational excursions provide the opportunity to explore the local community and culture, and beyond. **Educational excursions should support opportunities for students to achieve their potential.** Educational excursions represent but are not limited to live theatre, live music, art galleries, museums, historical sites, cultural events, healthy active living activities, environmental excursions and educational films and documentaries related to the Ontario Curriculum. The terms field excursion, student/school excursion and excursion are deemed to be synonymous with the term educational excursion.”

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*Health Information:* Personal Health Information is defined in the Personal Health Information Protection Act 2004 and includes, but is not limited to, information relative to the physical and mental health of the individual.

*Maladaptive Behaviour:* Behavior that can be viewed as the direct opposite of adaptive behavior, which is behaviour that enables a person to perform in their environment with greatest success and least conflict with others to meet academic, cultural, and social responsibilities. Maladaptive behaviour is a counterproductive or interfering form of behavior which harms individuals or the environment.

*Named Insured:* Means that an individual or organization is named on the insurance policy.

*Ontario Physical Activity Safety Standards in Education (OPASSE):* represent the *minimum* (minimum does not refer to minimal safety standards but to the minimum requirements for safety standards that must be followed in school-based physical activities) standard for risk management practice for school boards in Ontario for curricular and intramural/club physical activities and interschool sports. They focus the attention of teachers, intramural supervisors and coaches on safe practices in order to minimize the element of risk.

*Service Provider:* Refers to any venue providing any element of the activities included in the excursion process. Service providers may include transportation services, providers of admission to the venue, and non-board employees acting as facilitators/instructors. Tour companies providing comprehensive excursion related services would also fit this definition.

*Student Support Grants:* Student Support Grants are established and administered through the HWDSB Foundation for Student Success, in order to respond to emergency or extraordinary needs of HWDSB students. This can include excursions that include a cost.

*Teacher in Charge:* One or more teachers may be designated as the Teacher in Charge. It is required that at least one certified teacher, employed by HWDSB, be assigned to supervise each educational excursion. Non-teacher volunteer coaches must be under the supervision of a certified teacher, vice-principal or principal employed by HWDSB. The Teacher in charge may also refer to or school principal or vice-principal. The Teacher in Charge may or may not be the homeroom teacher of the students attending the excursion. The Teacher in Charge will be the teacher responsible for coordinating all aspects of the excursion including completion of the *HWDSB Planning Checklist for Educational Excursions and Athletics*. There is no additional remuneration for the Teacher in Charge.

*Volunteer:* An individual who agrees to undertake, without pay or other remuneration, a designated task that supports a student, a classroom, a school, or an HWDSB system initiative. Volunteers in the context of Educational Excursions may include supervisors, drivers, participants, or a combination thereof. The use of volunteers is governed under HWDSB's *Volunteer Policy and Procedure*.

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### PROCEDURES:

#### 1.0 Educational Excursion Planning

- 1.1 All activities off school premises that are promoted or organized, must be approved by the principal as part of the school program. Activities that are not approved shall not be in any way promoted or organized during school hours or associated whatsoever with the school or Board.
- 1.2 A superintendent must approve any excursion that:
  - Is outside of Canada.
  - Is outside of Ontario.
  - Has a duration of more than two instructional days.
  - Includes high risk activities (see *Appendix Two: Ontario Physical Activity Safety Standards in Education – High Risk Activities*) with the exception of Athletics activities or excursions that have been previously approved the superintendent responsible for Athletics (e.g., Interscholastic swimming competitions).
- 1.3 Educational excursions should be appropriate, constructive in nature and must be planned to meet student learning expectations.
- 1.4 Educational excursions must be compatible with the age and learning development of the students.
- 1.5 Schools are encouraged to create opportunities for students to experience the richness and diversity of their local community and culture.
- 1.6 Planning for educational excursions should ensure accessibility to all students, regardless of race, ancestry, place of origin, colour, ethnic origin, citizenship, creed, sex, sexual orientation, disability, gender expression, gender identity, or socio-economic status.
- 1.7 The Code of Conduct and Student Code of Conduct on School Related Vehicles, is applicable to educational excursions. On rare occasions, students may be denied participation on an educational excursion if the student has continuously demonstrated a pattern of behavior in violation of the Codes of Conduct at school or school related events, prior to the excursion. Principals should discuss their concerns and review options with the parent/guardian and discuss the rationale for their recommended decision with the Superintendent of Student Achievement prior to the excursion. Where a student is denied participation on an educational excursion, teachers must provide the student with an in- school opportunity to meet the learning expectations of the excursion.

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- 1.8 A change in locale involves risks and responsibilities beyond those encountered in the classroom. Planning must extend beyond the usual lesson preparation to include pre-excursion instruction, effective preparatory communications with parent/guardian(s), the supervision and safety of the students during the excursion, and appropriate evaluation, assessment, and/or follow-up activities.

The Teacher in Charge and the school Principal must thoroughly review and complete the *HWDSB Planning Checklist for Educational Excursions and Athletics* to ensure all risks have been anticipated and mitigated. If the Principal cannot answer affirmatively to the items on the *HWDSB Planning Checklist for Educational Excursions and Athletics*, they must consult with their superintendent for approval. Please note that the Teacher in Charge must be an employee of the HWDSB.

A copy of the completed and signed Checklist must be retained in the school office and for the current school year, plus one additional year.

Reasonable Foreseeability is assessed in claims involving negligence. Did the school board take reasonable care to avoid acts or omissions that could be reasonably foreseen to cause injury? What should have been known by someone with the school board employee's knowledge and experience? This cannot be based on hindsight, but instead must be determined at the time of the alleged wrongdoing.

- 1.9 In order to minimize the inherent element of risk of educational excursions, the Ontario Physical Activity Safety Standards in Education (OPASSE) for all sports and activities in both elementary and secondary panels are to be used. Current OPASSE must be used.

There are certain high-risk excursions and activities which the Hamilton-Wentworth District School Board will not approve. Please refer to *Appendix One: Activities Not Approved* for the listing and *Appendix Two: Ontario Physical Activity Safety Standards in Education - High Risk Activities*. Neither the Principal nor the SOSA will approve any excursion which involves these activities as such activities do not have Board approval and do not adhere to recommendations from the board's insurer.

Superintendents will rely on the safety requirements found in the OPASSE as the minimum standard and will expect that the Teacher in Charge, supervisors and principals will have reviewed and implemented the OPASSE as published. Refer to Appendix Two for a summarized listing of activities which the OPASSE has identified as either high risk or not appropriate. Please note that the superintendent will not approve excursion activities where the OPASSE define the activity as "not appropriate" for the age group or where the OPASSE define the activity as "not recommended".

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- 1.10 A pre-excursion meeting with parents/guardians must be part of the planning for all out-of-province and out-of-country excursions, and for high-risk excursions and activities.

### 2.0 Responsibilities

- 2.1 Principals/Vice-Principals: For the purpose of this section, the role of the principal may be delegated to the vice-principal.

- 2.1.1 Before approving any excursion, the principal must ensure that all planning, preparation, proposed bookings, supervision and notifications, including those of inherent risk, have been organized by the Teacher in Charge in accordance with the Board approved Educational Excursions Policy and Procedure. The *HWDSB Planning Checklist for Educational Excursions and Athletics* must be thoroughly reviewed and signed by the principal.

If the Principal cannot answer affirmatively to the items on the *HWDSB Planning Checklist for Educational Excursions and Athletics*, they must consult with their superintendent for approval.

- 2.1.2 Principals and Teachers in Charge must also refer to *Appendix One: Activities Not Approved* and *Appendix Two: Ontario Physical Activity Safety Standards in Education – High Risk Activities*.

- 2.1.3 It is expected that schools fully inform parents/guardians of the transportation, activities and supervision, as well as the cost breakdown, before seeking parent approval. Online forms are available where excursions are considered. For higher risk excursions and overnight excursions, schools will host a pre-excursion information session that also outlines the contact information, itinerary and emergency plan of the excursion. Schools are expected to remain in touch by cell phone with supervisors of a high-risk excursion.

### 2.2 Teachers:

- 2.2.1 When planning an excursion, teachers are required to follow the Board-approved Educational Excursions Policy and Procedure.

- 2.2.2 Principals and Teachers in Charge must complete the HWDSB Planning Checklist for Educational Excursions and Athletics to ensure all necessary arrangements are made. They must also refer to *Appendix One: Activities Not Approved* and *Appendix Two: Ontario Physical Activity Safety Standards in Education – High Risk Activities*.

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- 2.2.3 Planning should include accounting for all excursion costs and expenditures. The HWDSB Excursion Costing Summary is available online to assist teachers in planning the total cost and amounts to be collected from each student.
- 2.2.4 Teachers are required to inform students and volunteers of all expectations in participating in the excursion and to ensure parents/guardians are informed of all details of the excursion, including inherent risk where applicable. The Parent/Guardian Consent Form is available online to assist in communicating the risks to parents/guardians.
- 2.2.5 Because excursions provide the opportunity to extend learning, it is important that they are carefully planned to ensure that all students can participate with dignity, including those with prevalent medical conditions. The Teacher in Charge shall consult with the Principal and the parents/guardians of students who are medically fragile, at risk, or require special assistance in their daily learning program, to plan how they will participate on an educational excursion. An emergency plan needs to be in place for all students, as well as individual plans necessary for specific students.
- 2.2.6 For the duration of the excursion, the teacher will have access to student information, contact, medical and any other vital information. In advance of the excursion, the teacher and Principal will review a communication strategy should there be an emergency.
- 2.2.7 Excursions of higher risk should include constant communication between the Teacher in Charge and the school throughout the duration of the excursion.  
  
Teachers are expected to consult with the Principal should any unexpected incidents occur during the excursion.
- 2.2.8 Teachers will be models for the students and the Board and refrain from smoking and substance use (e.g., alcohol, cannabis, illegal drugs, vaping) during the excursion.

### 2.3 Students:

- 2.3.1 Students are expected to adhere to educational excursion expectations, the Code of Conduct and Student Code of Conduct on School Related Vehicles.
- 2.3.2 Students are accountable to the teacher and the principal for their actions.

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2.3.3 Students are required to be prepared for the educational excursion with the appropriate clothing, equipment and supplies.

2.3.4 Students are required to follow the directions of all personnel involved with the excursion.

2.3.5 Students 18 or over are responsible for extended medical insurance for educational excursions that occur out of province or out of country.

### 2.4 Parents/Guardians:

2.4.1 Parents/guardians who give permission for their child to participate on an educational excursion are expected to be informed of the details of the excursion and to review them with their child. The Parent/Guardian Information Letter template is available online to assist schools in communicating the details of the excursion to parents.

2.4.2 When giving permission, parents/guardians are required to ensure the school's records are updated with any medical conditions of the child and to provide current emergency information and contacts.

2.4.3 Parents/guardians will consult with the teacher and the principal in order to determine the participation of a child who is medically fragile, at risk, or requires special assistance in their daily learning program.

2.4.4 Parents/guardians are asked to support the School Code of Conduct and Student Code of Conduct on School Related Vehicles by reinforcing these expectations with their child and being prepared to assist the school in returning their child from the educational excursion in the event of an emergency or a breach of the School Code of Conduct by their child prior to the completion of the excursion. Arrangements and costs incurred shall be the responsibility of the parent/guardian.

2.4.5 On the day of the educational excursion, in the event of illness, parents/guardians are asked to advise the school, in order that the excursion departure not be delayed.

### 2.5 Volunteers:

2.5.1 Volunteers must be identified by the Teacher in Charge and approved by the principal. They will have completed the volunteer screening processes outlined in HWDSB Volunteer Policy and Procedure 1.8 and demonstrated sound judgement.

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The main purpose of a volunteer is to assist with the smooth operation of the excursion. All volunteers must be known to the principal and demonstrate the following characteristics as outlined in the HWDSB Planning Checklist for Educational Excursions and Athletics:

- Maturity.
- Rapport with students.
- Communicate in common language.
- Maintain confidentiality.
- Ability to maintain vigilance and awareness of potential hazards.
- Ability to act independently and support any student in need of assistance.
- Reliable and good attendance.
- Participate independently. No dependents or pets permitted.

2.5.2 Volunteers are expected to know the details of the educational excursion and their specific duties.

2.5.3 Volunteers are expected to support the School Code of Conduct and Student Code of Conduct on School Related Vehicles and report any inappropriate student conduct to the teacher.

2.5.4 Volunteers are expected to adhere to the excursion schedule and dress appropriately for the purpose of the educational excursion.

2.5.5 Volunteers are expected to refrain from smoking and substance use (e.g., alcohol, cannabis, illegal drugs, vaping) during the excursion.

2.5.6 On the day of the educational excursion, in the event of illness, volunteers are asked to advise the school, in order that the excursion departure not be delayed.

2.5.7 Volunteers who are not employees of the Board must maintain confidentiality of any health information or other student information of which may come into their possession in their volunteer capacity.

2.6 Superintendents:

2.6.1 Superintendents are responsible for ensuring that educational excursions are planned in accordance with Board policy.

2.6.2 Before approving any excursion, the superintendent must ensure that the HWDSB Planning Checklist for Educational Excursions and Athletics has been completed,



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that the OPASSE is being followed and that all risks have been considered and mitigated.

2.6.3 Under no circumstances will superintendents give approval for any educational excursion that involves activities listed in Appendix One: Activities Not Approved and Appendix Two: Ontario Physical Activity Safety Standards in Education – High Risk Activities.

### 2.7 Insurance and Risk Services:

2.7.1 The administration of insurance matters is managed through Procurement and Risk Services which provides support to the school principal regarding risk management and the assessment of school excursion activities. Procurement and Risk Services is the liaison and resource between Board staff and the insurer, regarding liability issues. Insurance and Risk Services prepares and issues an annual list of approved carriers each fall.

2.7.2 HWDSB will establish a Risk Management Advisory Committee that will be responsible for periodically reviewing practices related to educational excursions and making suggestions to Executive Council that will reduce risk and maximize educational benefits.

### 3.0 Educational Excursion Costs

3.1 Educational excursion costs are expected to be affordable to students and approved by the principal. Costs for educational excursions, including fundraising, will be reviewed annually with input from the school council.

3.2 All students will be able to participate with dignity in an excursion regardless of cost. Planning for excursions must include provisions to ensure every student may participate.

3.3 A plan for accounting for educational excursion costs and expenditures, including a plan for use of any residual funds, should be developed as part of monitoring, and should be approved by the principal and shared with parent/guardian/caregivers. The Teacher in Charge will prepare the *HWDSB Excursion Costing Summary* and submit to the principal to review. In the event of an insurance claim, a complete account of funds is required.

3.4 Cancellation insurance must be made available through the tour provider for all overnight excursions. Any costs associated with the purchase of cancellation insurance would become part of the cost of the educational excursion which is paid for by the student/parent/guardian/caregiver. An exception to this requirement can be made for hotels

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and other travel arrangements where the provider clearly states in the contract that the booking may be cancelled at any time (up to a reasonable notice period), without penalty or loss of deposit.

- 3.5 Any occasional teacher costs incurred to accommodate for educational excursions will be charged to the school budget.

### 4.0 Application and Approval Process:

Approval is required in accordance with the type of educational excursion being planned. The Teacher in Charge must complete the *HWDSB Planning Checklist for Educational Excursions and Athletics* for approval within the timelines outlined below.

Exceptions to the timelines below will only be permitted in cases where a team/club is participating in a competition and their participation in the competition is based on a preceding event, of which the outcome was unknown in advance, to meet the prescribed timelines.

The chart that follows outlines approval timelines and requirements:

<b>All Excursions within Ontario (where all items on Checklist are confirmed in agreement)</b>	<b>All Excursions outside of Ontario, high risk activities and/or include elements that are not confirmed as in agreement on the Checklist</b>
Approval Lead Time: Two weeks	Approval Lead Time: Three months within Canada Six months outside of Canada
Teacher submits to the Principal for approval	Teacher submits to the Principal for approval, who will then forward to the Superintendent for approval.
<b><i>Retain a signed copy of all applications and forms in the school office for spot-checking and insurance purposes.</i></b>	

### 4.1 Repetitive Visits and/or Spontaneous Neighbourhood Excursions

4.1.1 Where permission is required for more than one visit by the same student(s) to the same destination for similar activities, or within the neighbourhood for physical education or spontaneous activities, the Teacher in Charge is expected to complete the Multiple Excursions Schedule for approval, and upon approval to indicate:

- The destination.
- A brief description of the activities.
- Method of transportation being used.
- A schedule of the proposed dates (repetitive) of the visits.

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Parents/guardians are asked to indicate their consent on the Multiple Excursions Schedule for the activities listed and return the schedule to the school including their signature. Parents/guardians are not required to consent to all of the activities listed in order to have their child participate in the activities for which they have given consent.

### 4.2 Physical Education and Athletics

4.2.1 Where educational excursions are part of the Physical/Health Education Program, teachers are to follow requirements outlined in the OPASSE for all sports and activities in the elementary and secondary panels. The appropriate permission form for participating in physical activity and the current medical information form must also be in the school's records.

### 4.3 Extra-Curricular Activities

4.3.1 Where educational excursions are part of the Athletic Program, teachers are to follow requirements outlined in the OPASSE. For extra-curricular athletic activities sanctioned by the Board, the appropriate Student Athlete Information Package must be completed. A permission form for participating in physical activity and the current medical information must also be in the school's records.

### 4.4 Activities That Will Not be Approved

4.4.1 Any activity off school premises, or travel tour which is not approved by the principal as part of the school program, shall not be promoted or organized during school hours or in association whatsoever with the school or Board.

4.4.2 Approval will not be given for any educational excursion that involves activities listed in Appendix One: Activities Not Approved and Appendix Two: Ontario Physical Activity Safety Standards in Education – High Risk Activities

## 5.0 Supervision

5.1 Supervisors are expected to demonstrate good judgment and common sense at all times. Consideration must be given to supervising overnight excursions and how to manage the supervision of student sleeping areas.

5.2 Ratio of Supervisors to Students:

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- 5.2.1 An adequate number of supervisors must be provided to cover eventualities such as accidents, discipline problems, health concerns, and late arrivals (missed deadlines).
- 5.2.2 Alternative arrangements must be made with the parent/guardian/caregiver should it be necessary to return a student to the school/home prior to the completion of the excursion. No student shall be sent home unaccompanied by an excursion supervisor. Arrangements and costs incurred shall be the responsibility of the parent/guardian.

The following minimum adult-to-student ratios are required:

<b>Elementary</b>	<b>JK, SK</b>	<b>1:5</b>
	<b>Grades 1-3</b>	<b>1:8</b>
	<b>Grades 4-6</b>	<b>1:10</b>
	<b>Grades 7-8</b>	<b>1:13</b>
<b>Secondary</b>	<b>Grades 9-12</b>	<b>1:15</b>

If the activity involves higher inherent risk, Supervision Ratio's must be in accordance with OPASSE (the Safety Standards).

### 5.3 Supervision of Overnight Educational Excursions:

- 5.3.1 Supervisors must be provided to cover eventualities such as accidents, discipline problems, health concerns, and late arrivals (missed deadlines).
- 5.3.2 Alternative arrangements must be made with the parent/guardian should it be necessary to return a student to the school/home prior to the completion of the excursion. Arrangements and costs incurred shall be the responsibility of the parent/guardian/caregiver.

### 5.4 Qualifications of Teachers in Charge

- 5.4.1 At least one certified teacher, employed by HWDSB, must be assigned to supervise each educational excursion. Non-teacher volunteer coaches must be under the supervision of a certified teacher, vice-principal or principal employed by HWDSB. The superintendent must approve any exception in conjunction with the Principal. Volunteer supervisors and/or non-teacher volunteer coaches are to be approved by the school Principal as per the board's Volunteer Policy and Procedure.

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5.4.2 Some activities require supervisors to hold specific certification in order to supervise the activity. This is especially significant for higher inherent risk activities (e.g., camping, swimming, canoeing, rock climbing). For complete certification requirements, refer to the OPASSE.

### 6.0 Parent/Guardian Information and Consent

#### 6.1 Information and Permission

6.1.1 Parents/guardians are to be notified of all educational excursions. Once approval for the excursion is received from the principal, the teacher will complete the following educational excursion documents: Parent/Guardian Information Letter and Parent/Guardian Consent Form and forward to the parent/guardian of the student for information and consent. Templates of both are available on myHWDSB.

6.1.2 Students under the age of 18 shall not participate in an excursion without delivering a signed Parent/Guardian Consent Form or online consent (where permitted).

#### 6.2 Emergency/Health Information

6.2.1 In the Parent/Guardian Information Letter, parents/guardians are requested to update the school immediately if there are any changes to:

- Parents/guardians and home address/phone numbers.
- Emergency contact names/phone numbers.
- Medical/health concerns.

6.2.2 Teachers will obtain the Student Emergency Medical/Contact Information form from the PowerSchool student information system and bring this along on the excursion or have this information accessible on a secure electronic device.

For overnight excursions, or where the PowerSchool forms are not practical to use, it is suggested that a copy of the Student Emergency Medical/Contact Information form is sent home in the information package to parents/guardians so that they can review this information and advise the school of any changes.

6.2.3 Staff will not administer any student medications on excursions with the exception of oral prescription medication as outlined in the Administration of Oral Prescription Medication Procedure. The student must be able to self-administer any other medications. Staff may follow the Board's Supporting Students with Prevalent Medical Conditions Procedure under the Medical Health Supports Policy

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should they have reason to believe a pupil is experiencing an anaphylactic reaction without preauthorization to do so.

### 6.3 Informed Consent Information

6.3.1 For all educational excursions, the Parent/Guardian Consent Form must be completed by the Teacher in Charge and principal and forwarded to the parent/guardian for completion and returned to the school.

## 7.0 Transportation

### 7.1 Busing

7.1.2 Bus carriers should be selected from the list of pre-approved carriers for HWDSB, in accordance with the Board Transportation Policy. Approved carriers can be obtained through the Purchasing Services Department or in myHWDSB.

Where more than one bus will be used to transport participants, the following conditions will apply:

- a) The Teacher in Charge of each bus will have a list of the students assigned to the bus on the approved Transportation by Approved Carrier form.
- b) The school office will be provided with a copy of each bus list.
- c) Students must travel on the bus and in the seat to which they have been assigned.

### 7.2 Tour Companies

7.2.1 Tour companies who arrange their own carriers for educational excursions are required to provide the following:

- a) Proof of general liability insurance for no less than two million dollars per occurrence.
- b) Proof of fleet auto insurance in the amount not less than eight million covering passenger and road hazard.
- c) Proof of an in-date Commercial Vehicle Operating Licence.

### 7.3 Volunteer Drivers using Private Vehicles or another Licensed Automobile

7.3.1 Volunteer drivers are any persons authorized by the Principal, who have agreed to transport students while driving their own or another licensed automobile that meets the requirements of the Board outlined on the Educational Excursion Volunteer Driver Form. Volunteer drivers must hold a minimum of a valid Ontario

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Class G License. The driver/owner must complete the Educational Excursion Volunteer Driver Form and submit it to the teacher for principal approval.

Please note that volunteer drivers are not covered under the Boards Fleet Automobile Insurance. In the event of an incident, volunteer drivers are required to contact their own insurance provider to seek coverage.

Volunteer drivers may be used exclusively for the transport of students or may be used in a capacity of both a driver and a volunteer supervisor.

### 7.4 Volunteer Drivers (Educational Staff) using Rental Vehicles

7.4.1 Where vehicles are being rented by educational staff for Board-sponsored educational excursions, the full insurance coverage offered by the rental company is to be purchased (Public Liability, Collision and Comprehension). The driver must provide proof of a license required to operate the specific vehicle rented.

### 7.5 Student Volunteer Drivers using Private Vehicles (not recommended)

7.5.1 If the volunteer driver is a registered student in the school, is 18 years of age, holds a valid Ontario Class G License and the Board required insurance amount, the driver must complete the Educational Excursion: Volunteer Driver form and submit it to the teacher for principal approval.

For the purposes of this section, it is not acceptable for a driver to have a G1, G2 or M class license.

Please note that volunteer drivers are not covered under the Boards Fleet Automobile Insurance. In the event of an incident, Volunteer Drivers are required to contact their own insurance provider to seek coverage.

### 7.6 Student Driver using Private Vehicle to Drive Self (not recommended)

7.6.1 Student drivers using a private vehicle to drive themselves must hold a valid Ontario Class G or G2 License. Student Drivers using private vehicles to drive themselves must be identified on the Identification for Transportation by Private Vehicle Form and on the Information to Parent/Guardian and Permission for Educational Excursion forms.

For the purposes of this section, it is not acceptable for a driver to have a G1 or M class license.

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Please note that volunteer drivers are not covered under the Boards Fleet Automobile Insurance. In the event of an incident, Volunteer Drivers are required to contact their own insurance provider to seek coverage.

### 7.7 Student Identification for Transport

#### 7.7.1 Approved Carrier: Complete *Student Identification for Transportation by Approved Carrier*.

- a) The list must remain with the supervisor in charge of each student group and in the possession of the teacher in charge of the excursion.
- b) A duplicate list is to be kept in the school office in the event that parent notification becomes necessary.
- c) Students must travel on the bus to which they have been assigned.

#### 7.7.2 Private Vehicle: Complete Student Identification for Transportation by Private Vehicle.

- a) The list must remain with the supervisor in charge of each student group and in the possession of the teacher in charge of the excursion.
- b) A duplicate list is to be kept in the school office in the event that parent notification becomes necessary.
- c) Students must travel on the bus to which they have been assigned.

#### 7.7.3 At the conclusion of the educational excursion, the lists shall be collected and disposed of by school staff in accordance with confidential information procedures.

### 7.8 Transportation of Excursion Related Equipment and Supplies

#### 7.8.1 The transportation of excursion related equipment and supplies shall be done in accordance with the safety requirements of the approved carrier.

#### 7.8.2 The Teacher in Charge will be responsible for tracking all board-owned equipment and supplies and for ensuring all items are returned to the school upon completion of the excursion.

### 8.0 Requirements of Program Service Providers

#### 8.1 When purchasing services for specific programs from facilities, the requestor is to acquire proof of general liability insurance for no less than two million dollars. Please refer Appendix Four – Certificates of Insurance for guidance on when a Certificate of Insurance must be obtained.



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- 8.2 Program Service providers must have certified instructors for higher risk activities that include (canoeing, skiing, rock climbing, etc.). Refer to the OPASSE for specific requirements for instructors. Where applicable, proof of the Technical Standards & Safety Authority (TSSA) license and certification is required to be provided by the owner/operator.

### 9.0 Risk Management

- 9.1 Managing risk may assist in minimizing injuries, ensuring a safe learning environment and reducing the liability exposure of the Board. Planning for educational excursions must include an emergency action plan, access to a first aid kit and cancellation insurance if applicable.
- 9.2 The Board, its employees and approved volunteers who have been assigned duties by the principal, are insured for liability in the event of a lawsuit alleging negligence while performing such duties for the Board.
- 9.3 There is Inherent Risk in any activity of excursion as accidents can occur and cause injury at any time. However, some educational activity programs, such as water sports, involve increased elements of risk. The chances of an accident occurring can be reduced by carefully following instructions at all times while engaged in this type of activity. When an educational excursion involves an activity that could increase the potential of injury, parent/guardian/caregivers and students need to be aware of and fully understand the risks involved in these activities. Part of the approval and permission process includes a Parent/Guardian Consent Form, outlining the inherent risk and the right of the parent/guardian to refuse their child's participation prior to the parent granting permission.

Due to the inherent risk in some activities, certain excursions and activities are not permitted. All activities which involve a higher level of inherent risk are to be presented to the superintendent for approval.

- 9.4 Student Accident Insurance: HWDSB does NOT provide any accidental death, disability, dismemberment or medical expenses insurance on behalf of students participating in educational excursions. If parents/guardians do not have private insurance coverage, Student Accident Insurance coverage may be purchased, at no cost to the Board, by parents/guardians each September. Coverage is available through Reliable Life at 1-800-463-KIDS (5437) or online at [www.insuremykids.com](http://www.insuremykids.com).
- 9.5 Extended Medical Insurance: It is the parent/guardian's responsibility to ensure that their child is covered by insurance appropriate to the educational excursion. It is mandatory for all participants in educational excursions out-of-province or out-of-country to have out-of-province extended medical insurance coverage.

## Educational Excursions Procedure

Note: OHIP no longer covers all medical costs incurred outside of Ontario. It is the parent/guardian and student's responsibility to provide comprehensive medical insurance coverage. Written proof of coverage is to be provided to the school principal at least one week prior to the excursion in order to participate in an educational excursion outside of the province or country.

- 9.6 Foreign Exchange Student: Medical coverage is not available through Provincial plans to foreign visitors. As a condition of attending any HWDSB school, Foreign Exchange students must secure their own private medical plans and extent of coverage. The Board makes available the opportunity for any student in full- time attendance to purchase student accident insurance.

In the event of a lawsuit, if an injury occurred, the Board is insured for liability. The responsibility of the Board to the student remains the same whether or not the student has a medical plan.

- 9.7 Accident Forms: Should any accident occur on the excursion, the Teacher in Charge ensures all accident forms are completed and filed upon return to the school.

### **10.0 Ongoing Monitoring and Review**

- 10.1 Risk Management Advisory Committee: A Risk Management Advisory Committee will be responsible for periodically reviewing practices related to educational excursions and making suggestions to Executive Council that will reduce risk and maximize educational benefits.

- 10.2 Records Retention: All educational excursion documents referred to above including:

- HWDSB Planning Checklist for Educational Excursions and Athletics
- Parent/Guardian Information Letter
- Parent/Guardian Consent Form
- HWDSB Multiple Excursion Schedule
- HWDSB Excursion Costing Summary

These documents must be retained in the school's records for the current year, plus one additional year. In addition, all correspondence, plans, schedules, busing/transportation information, etc. related to arrangements made must also be retained.

- 10.3 Ongoing Monitoring and Review: The superintendent responsible for the school will perform periodic spot checks of the school's educational excursion records to ensure that required documents are being retained and that evidence of sign-off is retained.

## Educational Excursions Procedure

- 10.4 Compliance with Procedure: It is the expectation of the HWDSB that all board employees and volunteers comply with this procedure. Any violations of this procedure may result in disciplinary action.

## ACTIVITIES NOT APPROVED

The following elements related to excursions are not permitted:

- Passenger Van with 9+ passengers and volunteer driver (except where van is driven by staff with appropriate license to operate)
- Private (non-commercial) aircraft
- Travel to areas experiencing war or political unrest
- Government of Canada Travel Advisories: “Avoid all travel” and “Avoid non-essential travel”.
- Parent volunteer placed in charge of activity (except where permitted under Volunteer Policy and Directive)
- Volunteer unknown to Principal and/or organizer

HWDSB students are not permitted to take part in the following activities for curricular, athletic, fundraising or other school-based activity purposes:

- Bouncy Castles/Any Other Inflatables
- Bubble Soccer
- Bungee Jumping
- Caving – Remote/Spelunking
- Cliff Rappelling
- Diving – Springboard/Tower
- Dunk Tanks
- Fireworks
- Firing Ranges
- Go-Carting
- Hang Gliding
- Horseback Riding/Animal Riding
- Hot Air Balloon Rides
- Kayaking – Sea or White Water
- Martial Arts – with Weapons
- Paint Ball
- Para-Sailing
- Parachuting
- Sailing
- Scuba Diving/Snorkelling
- Skateboarding
- Skydiving
- Swimming - Hotel Pools
- Swimming - Residential Pools
- Tobogganing/Snow Tubing
- Waterskiing/Jetskiing/Water Tubing
- Wave Pools (exception when waves are deactivated)
- Whitewater Activities – canoeing, rafting, tubing (permitted if in calm-water)
- Zip Lining at a non-TSSA regulated facility
- Zorbing

## Ontario Physical Activity Safety Standards in Education – High Risk Activities

Caution is given to the following activities as per the Ontario Physical Activity Safety Standards for Education.

Not Appropriate for Elementary	Elementary High Risk I (Instructor Training Required)	Elementary High Risk II (Constant Visual Supervision Required)
Baseball Climbing (Ascending Lines) <i>Grade 4-8 only</i> Climbing (Challenge Course – High Elements) <i>Grade 4-8 only</i> Climbing (Ice Climbing) Climbing (Outdoor Rock Climbing) <i>Grade 6-8 only</i> Combatives (Mixed Martial Arts) Cricket (Official Game) Diving Fencing Football (Tackle) Gymnastics (Above Ground Trampoline) Lacrosse (Box) Mixed Martial Arts Outdoor Education (Backpacking/Hiking - Backcountry) Outdoor Education (Camping - Backcountry) Outdoor Education (Canoe Tripping) <i>Grade 7-8 Only</i> Outdoor Education (Canoeing Moving Water) Outdoor Education (Canoeing) <i>Grade 4-8 Only</i> Outdoor Education (Flat Water Kayaking) <i>Grade 7-8 Only</i> Outdoor Education (Flat Water Stand Up Paddleboard) Outdoor Education (Paddle Rafting) <i>Grade 6-8 only</i> Outdoor Education (White Water Activities)	Archery Climbing (Aerial Parks) Climbing (Ascending Lines) <i>Grade 4-8</i> Climbing (Bouldering/Traverse Climbing Wall) Climbing (Challenge Courses – Low Elements) Climbing (Challenge Courses – High Elements) <i>Grade 4-8</i> Climbing (Climbing Wall & Related Activities) Climbing (Outdoor Rock Climbing) <i>Grade 6-8</i> Climbing (Zipline/Tyrolean Traverse) Dragon Boat Gymnastics (Bars, Rings, Beam, Floor, Vaults) Gymnastics (Bench & Box Activities) Gymnastics (Box Horse/Utility Box) Gymnastics (Climber) Gymnastics (Climbing Ropes) Gymnastics (In-Ground Trampoline) Gymnastics (Mat Work) Gymnastics (Mini-Trampoline) Gymnastics (Pyramid Building) Hockey (Ice – Lead-Up Games) Hockey (Ice) Horseback Riding Outdoor Education (Canoe Tripping) <i>Grade 7-8</i> Outdoor Education (Canoeing) <i>Grade 4-8</i> Outdoor Education (Flat Water Kayaking) <i>Grade 7-8</i> Outdoor Education (Paddle Rafting) <i>Grade 6-8</i> Outdoor Education (Swimming) Pilates Rowing <i>Grade 6-8</i> Self Defense Skateboarding Skating (Inline) Skating (Quad Roller) Skating (Speed Skating) Swimming	Blanket Toss Dodgeball Goalball Inuit Games Kindergarten/Primary Games (Playground Structures) Lacrosse (Field) Outdoor Education (Camping) Parachute Sepak Takraw Table Tennis Track and Field (Track Events) Track and Field (Triple Jump/Long Jump) Volleyball Volleyball (Beach)

<p>Outdoor Education (Winter Camping)  Ringette (Ice)  Rowing <i>Grade 6-8 only</i>  Rugby (Tackle)  Sailing  Scuba Diving  Snorkeling  Softball (Fast Pitch)  Track and Field (Discus)  Track and Field (Hurdles) <i>Grade 7-8 only</i>  Track and Field (Javelin)  Track and Field (Modified Javelin Activities) <i>Grade 4-8 only</i>  Track and Field (Pole Vault)  Triathlon  Weight Training  Windsurfing</p>	<p>Synchronized Swimming  Track and Field (Hurdles) <i>Grade 7-8</i>  Track and Field (Modified Javelin Activities) <i>Grade 4-8</i>  Track and Field (Shot Put)  Tug of War  Water Polo  Wrestling  Yoga</p>	
<p><b>Not Appropriate for Secondary</b></p>	<p><b>Secondary High Risk I (Instructor Training Required)</b></p>	<p><b>Secondary High Risk II (Constant Visual Supervision Required)</b></p>
<p>Baseball  Climbing (Ice Climbing)  Football (Tackle)  Mixed Martial Arts  Outdoor Education (White Water Activities)  Rugby (Tackle)  Softball (Fast Pitch)  Track and Field (Pole Vault)</p>	<p>Archery  Climbing (Aerial Parks)  Climbing (Ascending Lines)  Climbing (Bouldering/Traverse Climbing Wall)  Climbing (Challenge Courses - High Elements)  Climbing (Challenge Courses - Low Elements)  Climbing (Climbing Wall &amp; Related Activities)  Climbing (Outdoor Rock Climbing)  Climbing (Zipline/Tyrolean Traverse)  Combatives (Mixed Martial Arts)  Diving  Dragon Boat  Fencing  Gymnastics (Above Ground Trampoline)  Gymnastics (Bars, Rings, Beam, Floor, Vaults)  Gymnastics (Bench &amp; Box Activities)  Gymnastics (Box Horse/Utility Box)  Gymnastics (Climber)  Gymnastics (Climbing Ropes)  Gymnastics (In-Ground Trampoline)  Gymnastics (Mat Work)  Gymnastics (Mini-Trampoline)  Gymnastics (Pyramid Building)  Hockey (Ice- Lead-Up Games or Mini Games)</p>	<p>Blanket Toss  Dodgeball  Goalball  Outdoor Education (Camping)  Outdoor Education (Camping – Backcountry)  Outdoor Education (Winter Camping)  Track and Field (Field Events)  Track and Field (Triple Jump/Long Jump)</p>

	Hockey (Ice Hockey Games) Horseback Riding Outdoor Education (Canoe Tripping) Outdoor Education (Canoeing Moving Water) Outdoor Education (Canoeing) Outdoor Education (Flat Water Kayaking) Outdoor Education (Flat Water Stand Up Paddleboard) Outdoor Education (Paddle Rafting) Outdoor Education (Swimming) Pilates Rowing Sailing Scuba Diving Self Defense Skateboarding Skating (Inline) Skating (Quad Roller) Skating (Speed Skating) Snorkeling Swimming Synchronized Swimming Track and Field (Discus) Track and Field (High Jump) Track and Field (Hurdles) Track and Field (Javelin) Track and Field (Shot Put) Triathlon Tug of War Ultimate Disc Water Polo Weight Training Windsurfing Wrestling Yoga	
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Note 1 – High risk activities may be undertaken provided that **ALL** OPHEA safety considerations (Equipment/ Clothing/ Facilities/ Special Rules & Instructions/ Supervision) have been adequately addressed. If there are any safety considerations which cannot be met, the Principal should discuss the activity with their Superintendent of Student Achievement.

Note 2 – Ice Hockey is permitted **only** as part of curriculum for Hockey Skills Canada programming, and for extra-curricular.

## LIST OF ELECTRONIC RESOURCES

### **OSBIE – Ontario School Boards’ Insurance Exchange**

1a) Organization Website

<http://osbie.on.ca>

1b) OSBIE Field Trip Risk Management Guidelines

<http://osbie.on.ca/pdf/Field-Trip-Risk-Management-Guidelines.pdf>

1c) School Board/ Snow Resort Safety Guidelines for Out-of-School Trips for Winter Sports Education Programs

<http://osbie.on.ca/pdf/English-Ski-Package.pdf>

### **OPHEA – Ontario Physical Activity Safety Standards for Education:**

<https://ophea.net/ontario-physical-activity-safety-standards-education-opasse>

### **Suggested Apps**

- First Aid by the Canadian Red Cross



## INSURANCE REQUIREMENTS

### What is a Certificate of Insurance?

A Certificate of Insurance (COI) provides HWDSB access to another party's insurance policy. It is not a contract between HWDSB and the excursion venue or vendor. Being added to a COI gives HWDSB specific rights depending on how they are added. For example, the insurer for a venue or vendor may have to pay costs in a legal matter. Most insurance policies are renewed each year, so COI's must be renewed as well.

### Benefits of Being Added to an Insurance Policy through a Certificate of Insurance

- Provides safety and protection of HWDSB employees.
- Protects and provides coverage to HWDSB using another organization's insurance policy.
- Reduces HWDSB loss history when it comes to any claims.
- Reduces HWDSB's insurance premiums.

Staff planning an excursion should be cautious as many entities mislabel Certificates of Insurance. COIs should be reviewed carefully to ensure their intended purpose is fulfilled. This is critically important when there is a contractual requirement. If you have questions or concerns, reach out for any assistance at [risk@hwdsb.on.ca](mailto:risk@hwdsb.on.ca).

The need for a Certificate of Insurance is based in contract. All contracts must be reviewed by Procurement and Risk Services.

Certificates of Insurance are the last step in the process; the critical step is to review any applicable terms and conditions to create a legally binding contract.

Please note that most insurance companies will only provide a Certificate of Insurance for an event or some other limited basis. In many cases, each planned excursion requires its own COI. There may be some cases where an existing COI for the same year can be used for another excursion. Risk Services is in the process of creating a Preferred Vendor list for activities and excursions.

Please consult Risk Services if you have any questions or concerns at [risk@hwdsb.on.ca](mailto:risk@hwdsb.on.ca)

Any vendor or organization that requests to be added to HWDSB's insurance policy must be approved by Risk Services. Principals and Vice Principals will notify Risk Services within five (5) business days of any request. If the request is approved, Risk Services will send the COI to be included in the excursion package.

### Steps for Schools:



**EMERGENCY PLANNING**

It is appropriate to consider what may happen in case of an emergency prior to an excursion. Below are some items for consideration to plan in advance.

<b>Element of Emergency Plan</b>	<b>Teacher Notes</b>
<b>Alternative transportation arrangements</b>	
<b>Delays due to inclement weather</b>	
<b>Telephone/communication chain when necessary to advise parents of arrivals, departures and deviations from itineraries</b>	
<b>Pre-approved alternative accommodations</b>	
<b>Budgetary contingencies and access to emergency funds</b>	
<b>First Aid training</b>	
<b>Availability of emergency supplies</b>	
<b>Availability of emergency telephone</b>	
<b>Transportation of prescription medicine belonging to students</b>	

<p>Contact information of School Principal outside of school hours for overnight excursions</p>	
<p><b>Element of Emergency Plan</b></p>	<p><b>Teacher Notes</b></p>
<p>Emergency evacuation plans/meeting place established for overnight excursions</p>	
<p>Supervisors aware of the nearest hospital/emergency department</p>	
<p>Supervisors aware of how to access emergency services (911)</p>	
<p>Reaching supervisors/students during times group may be doing segregated activities</p>	
<p>Other</p>	
<p>Emergency Telephone  Numbers: School  Principal Cell  Transportation  Provider Tour  Company  Accommodations  Other</p>	

## Third Party Media Consent

HWDSB has a [media consent form](#) for all students that is completed annually. It covers all activities within the school, is optional and consent can be withdrawn at any time. You can read more in the [Privacy section of myHWDSB](#).

Third party media consents can only be considered if:

- It is a separate form.
- It must clearly describe what the parents/guardians are consenting to and include the following:
  - A list of what will be shared with consent and the format. e.g., is the third-party asking to share student names, images or creative works? Is the consent for the third-party to take photos or videos during the activity/excursion or is it a consent to display student creative work in a specified venue for a specific period of time?
  - The location where the student information, photos, etc. will be shared, e.g., in publications, on third-party website, on social media.
  - Contact person that parents can reach out to if they have any questions or concerns.
- It must be optional and participation in the activity or excursion can't be contingent on parents/guardians consenting to photography, videos and/or sharing their child's personal information. Parents should never be pressured into giving consent.
- Parents/guardians and students should have the option to withdraw their consent if they decide they no longer want the student's information, images, etc., shared after they've signed the consent form. The media consent should advise of this right and who to contact.
- It must be clear in the media consent that once information is shared publicly, it could be copied, altered, saved or shared further without the knowledge of HWDSB or the organization requesting consent. This also means that if a parent/guardian or student withdraws their consent, although it can be removed from the third parties' platforms, any information already shared publicly may have already been shared or copied elsewhere.
- It cannot be for promotional or marketing purposes. If this is the intent of the consent, we could ask the organization if they can instead achieve this with clip art or non-identifying images (e.g., photos of things versus people), to reduce the impact on our students' digital footprints.
- There should always be a time limit for how long a third-party organization can use and re-use the information consented to. One year is reasonable.

### Student Online Accounts with Third Party Service Providers or Venues

Some venues are requesting that students create online accounts to access information. This is not acceptable due to the associated privacy and security risks. If there is content that the venue feels is pertinent to access as part of the experience, the teacher might, if they wish, create an account using their board email address. The teacher can share the content with students if it meets board standards and is educational versus marketing content.