

**AMEND BOARD REPORT 07-0725-PO1**  
**STUDENT TRAVEL POLICY**

**THE CHIEF EXECUTIVE OFFICER RECOMMENDS:**

That the Board amend the Student Travel Policy.

**PURPOSE:** The objectives of this policy are to: (1) establish requirements for student travel and trips to ensure the safety and well-being of students and chaperones; and (2) establish a uniform set of procedures that govern the travel approval process.

**POLICY TEXT:**

**I. DEFINITIONS**

**Chaperone:** Chaperones are assigned to a trip by the principal to assist with the supervision of student behavior and group activities. Chaperones may include certified teachers, educational support personnel, or parents or other volunteers. Chaperones must be at least 18 years old. In order to be eligible to serve on an overnight student travel trip, all chaperones must meet the requirements in the Board's Volunteer Policy (Board Report 06-0927-PO2), as may be amended, which includes a criminal background investigation and a tuberculosis check.

**Educational trips:** Educational trips are designed (1) to provide students with knowledge and experiences to supplement their curriculum or (2) to provide enrichment experiences. Educational trips that supplement the curriculum include, but are not limited to, visiting museums and zoos and going to theater productions, business/industry tours, cultural exhibits, and nature centers. Educational trips that provide enrichment experiences include, but are not limited to, trips outside the borders of the U.S. or trips that are part of an extracurricular activity. Educational trips fall into one of the following four categories which determine the applicable trip requirements:

- Category 1 - Trips outside the borders of the U.S or its territories
- Category 2 - Trips within the U.S. that may include an overnight stay or have a total value of \$10,000 or more
- Category 3 - One-day field trips with a total value of less than \$10,000
- Category 4 - Interscholastic competitions and other similar events with a total value of less than \$10,000

**Manager:** The Manager means the ~~Area Instruction Officer~~ Chief Area Officer or designee or the department head or designee who oversees the school's activities as determined by the Officer.

**Non-educational trips:** Non-educational trips are trips that have little or no educational value. They include, but are not limited to, trips to amusement parks and/or recreational facilities.

**Officer:** The Officer means the P-12 Management Officer or designee ~~Elementary Areas and Schools Chief Officer or designee or the High School Chief Officer or designee.~~

**School Tour Supervisor:** A School Tour Supervisor is a certified teacher designated by the principal to be the lead chaperone on a Category 1 or 2 trip and the point of contact for the principal while on the trip.

**II. GENERAL REQUIREMENTS**

A. Educational Travel - Only educational travel is permitted. The Officer acts as final arbiter of whether a trip is educational or non-educational.

B. Applications for Student Travel - The principal must file a Student Travel e-Application for each travel event.

C. Permission slips and release forms – The principal must verify that there is a signed parent/guardian permission slip for each participating student and when applicable, a signed release form for each participating student and for each participating adult chaperone. The school must retain originals of each of the permission slips and/or release forms. Each form must have original signatures (i.e., no stamps and no initials).

D. Funds disbursement - No funds, including deposits, shall be disbursed by a school before the Manager approves the Student Travel e-Application.

E. Contract Review – Principals are required to follow the applicable Board Rules when entering into contracts.

F. Scheduling Restrictions - Schools may not schedule Category 1 or 2 trips during the first three weeks or the last two weeks of the school year, unless an Officer authorizes an exception prior to scheduling the trip. Further, no student is permitted to participate in a trip when that student is scheduled to take a standardized test. Trips may be scheduled during the summer.

G. Supervision – All trips must conform to the chaperone requirements for their Category.

H. Planning – In general, student trips are planned by a certified teacher or administrator for one school. However, if a trip involves students from multiple schools, it must be approved by all of the respective principals, Manager(s) and Officer(s) involved. If a trip is planned by a central office department (which may or may not be in conjunction with an outside entity) the central office department is responsible for insuring compliance with all applicable requirements in this policy and guidelines.

I. Right to Rescind - The Manager or Officer retains the right to rescind approval of trips when, in the judgment of the Manager or Officer, circumstances may jeopardize the safety of students and chaperones.

J. Student participants – Only enrolled students are eligible to participate in a student trip. Students are subject to the Student Code of Conduct while participating in a student trip. The principal may refuse to allow a student from participating in any trip, consistent with the travel guidelines, so long as the student is not denied participation solely due to a disability. A student/parent may appeal the decision to deny a student's participation to the Manager, who shall make the final determination.

K. Additional Adult Trip participants – An adult who wishes to travel on a student trip, but who is not serving as a chaperone, must be approved by the principal and meet the requirements of the Board's Volunteer policy.

L. Approval – Approval requirements and timelines are determined by the trip category and all trips must be approved prior to the date of travel and/or the disbursement of funds.

M. Guidelines - The CEO or his/her designee shall develop guidelines to establish procedures and forms necessary to implement the requirements of this policy.

N. Violations - Violations of this policy may lead to action under the Employee Discipline and Due Process Policy (Board Report 04-0728-PO1), as may be amended.

### III. SPECIFIC REQUIREMENTS

#### A. Requirements for Category 1 Trips - Trips outside the borders of the U.S. or its territories

##### 1. Approval Procedures

- a. The principal should complete and submit the Student Travel e-Application to the Manager for initial approval no less than sixty (60) calendar days prior to the date of travel.
- b. The Manager will review and, upon finding it compliant with this policy, route the Student Travel e-Application to the Officer for final approval.
- c. The Officer is responsible for granting the final approval of the Student Travel e-Application and reporting it to the Board in a monthly student travel report.

##### 2. Appeal

If the Manager does not approve the trip, the Manager shall cite the reasons in writing, and the principal may appeal the decision to the Officer.

##### 3. Travel times and duration

- a. The duration of travel for elementary school students is limited to no more than seven (7) school days.
- b. The duration of travel for high school students is limited to no more than ten (10) school days.
- c. No student is permitted to participate in a trip three (3) weeks leading up to and including system-wide testing.

##### 4. Location

- a. No travel is permitted to any place where the U.S. Department of State has issued a Travel Warning or where the region is deemed unsuitable for student travel by the Officer.
- b. No travel is permitted to any place where the Board's liability insurance is restricted.

##### 5. Principal Responsibilities

- a. During the planning period of the trip, the principal is responsible for:
  1. Designating a School Tour Supervisor;
  2. Completing and reviewing the Student Travel e-Application to verify that all requirements are met;
  3. Verifying that the tour has educational value and reviewing the School Tour Supervisor's plan for students to complete classroom assignments;
  4. Informing the Officer if the trip will include students in grades 6 or lower for approval;
  5. Requesting approval from the Officer for any home-stay arrangements to house students with host families in private homes. Home-stays may only be requested for students in grades 7 through 12 in accordance with the travel guidelines;
  6. Verifying that all student and chaperone trip participants have valid passports;
  7. Regularly reviewing information about the destination country on the U.S. Department of State website ([www.state.gov](http://www.state.gov)) to ensure that the students will not travel to any place where there is a Travel Warning. At a minimum, the review should occur: (1) at time of planning, (2) thirty (30) days prior to the trip and (3) the day prior to travel;
  8. Notifying the Manager if there is a Travel Warning and canceling or rerouting the trip;
  9. Upon Officer approval of the trip, registering the trip with U.S. Department of State ([http://travel.state.gov/travel/tips/registration/registration\\_1186.html](http://travel.state.gov/travel/tips/registration/registration_1186.html)) and recording the confirmation number in the Student Travel e-Application;
  10. Verifying that the School Tour Supervisor has the U.S. Consulate contact information for the destination countries; and
  11. Identifying and specifying emergency procedures for School Tour Supervisor.
- b. While the trip is in progress, the principal or designee must:
  1. Maintain contact with the School Tour Supervisor on a daily basis and as needed during the trip;

2. Have readily available emergency information and copies of travel documents for all students and chaperones (e.g. copies of passports, copies of visas, medical information including allergies and medications, and contact persons and numbers);
3. Have available the name and telephone number of the tour operator or travel agency;
4. Have available the address and telephone number of the nearest U.S. consulate and/or embassy in the destination countries;
5. For home-stay arrangements, have available the name, address, telephone numbers and language capabilities of all host families; and
6. In case of an emergency, notify parents/guardians of the students involved, the Manager and Officer as soon as possible.

6. Supervision

a. School Tour Supervisor Responsibilities

1. Securing international cell phone;
2. Maintaining contact with the principal on a daily basis and as needed during the trip;
3. Holding all emergency information for all trip participants (passports, visas, medical information including allergies and medications, and contact persons and numbers in case of an emergency);
4. Having available the address and telephone number of the nearest U.S. consulate and/or embassy;
5. Having available the name and telephone number of the tour operator or travel agency;
6. When applicable for home-stay arrangements, having available the name, address and telephone numbers of host families; and
7. Developing and implementing a plan to ensure that student-participants' classroom assignments are met.

b. Chaperone Responsibilities

1. Chaperones must accompany students during the trip and while in transit to and from the travel destination;
2. One (1) chaperone is required for every six (6) students. A minimum of two (2) certified teacher employees is required regardless of the number of students traveling; and
3. In case of an emergency, the chaperones must contact one of the following as soon as possible in the order given and subject to availability: principal, Manager and Officer.

7. Insurance

The principal must require that each student and chaperone participant secure travel insurance to cover trip cancellation and medical coverage consistent with the travel guidelines. The Board is not responsible for any expense incurred due to the cancellation or rerouting of any trip for any reason.

**B. Requirements for Category 2 Trips - Trips within the U.S. that may include an overnight stay or trips having a total value of \$10,000 or more**

1. Approval Procedures

- a. The principal should complete and submit the Student Travel e-Application to the Manager thirty (30) calendar days prior to the trip.
- b. The Manager will review and, upon finding it compliant with this policy, route the Student Travel e-Application to the Officer for approval.
- c. The Officer is responsible for granting the final approval of the Student Travel e-Application and reporting it to the Board in a monthly student travel report.

2. Appeal

If the Manager does not approve the trip, the Manager must cite the reasons in writing, and the principal may appeal the decision to the Officer.

3. Supervision
  - a. The principal must appoint a School Tour Supervisor and identify trip chaperones in a ratio of one (1) adult to every six (6) students with a minimum of two (2) chaperones on every trip, one of whom must be a certified teacher employee.
  - b. For ROTC trips, an Officer may approve a Manager's request for an exception to the chaperone ratio requirement noted above and allow a ratio of one (1) adult to every ten (10) students with a minimum of two (2) chaperones on every trip, one of whom must be a certified teacher employee.

**C. Requirements for Category 3 Trips - One-day field trips (with a total value of less than \$10,000)**

1. Approval procedures
  - a. The principal must submit the Student Travel e-Application to the Manager for review at least five (5) workdays prior to the trip.
  - b. The Manager is responsible for reviewing the Student Travel e-Application for compliance with this policy and giving final approval. The Manager's determination is final.
  - c. Notwithstanding the foregoing, a principal may grant approval of walking tours of areas in and around the school neighborhood (i.e. visits to nearby parks) if (1) parents/guardians have provided consent on file for walking tours for the school year, and (2) the principal records his/her approval and completes a Student Travel e-Application for the walking tours.
2. Supervision
  - a. The principal must identify trip chaperones to accompany students in a ratio of one (1) adult to every ten (10) students, with a minimum of two (2) chaperones on every trip, one of whom must be a certified teacher employee.
  - b. If a trip involves one or two students, then one certified teacher or coach may chaperone with express permission from the principal and parent/guardian. If a trip involves a citywide event or activity, the principal must comply with the chaperone requirements specified for such event or activity in the travel guidelines.
  - c. The principal is responsible to verify and comply with the chaperone requirements of the facility or event being visited. If the facility or event requires a smaller chaperone ratio than this policy requires, the principal must appoint additional chaperones.

**D. Requirements for Category 4 Trips - Interscholastic competitions and other similar events with a total value of less than \$10,000**

1. Approval Procedures
  - a. Season athletic schedules and ROTC semester or annual schedules must be recorded and approved via the Student Travel e-Application.
  - b. Non-scheduled interscholastic competitions, interscholastic athletic or ROTC events and other similar events, require the principal to complete and submit the Student Travel e-Application to the Manager for approval prior to the date of the trip.
  - c. Any request for participation in a sporting event outside of the Chicago city limits must also be approved by the Director of Sports Administration or his/her designee.
  - d. Any request for participation in an event that involves an overnight stay and/or has a total value of \$10,000 or more is a Category 2 trip and shall require the principal to follow all requirements for Category 2 trips.
2. Supervision
  - a. Chaperones must accompany students in a ratio of one (1) adult to every ten (10) students with a minimum of two (2) chaperones on every trip, one of whom must be a certified, school-assigned teacher or coach.
  - b. If a trip involves one or two students, then one certified teacher or coach may chaperone with express permission from the principal and parent/guardian.

#### **IV. COSTS AND FEES**

- A. Parental Notice - A written description of all costs of the trip must be provided in advance to students and parents.
- B. Fee waiver - Schools shall adhere to the Policy Regarding Waiver of School Fees (Board Report 94-1026-PO2), as may be amended, and provide a waiver of trip fees for Category 3 trips, if applicable.
- C. Compliance with School Internal Accounts Manual - Schools must comply with the "School Internal Accounts Manual" for collecting, maintaining, and disbursing funds related to student trips.
- D. Discretionary funds – Discretionary funds such as State Chapter 1 funds may be used for student trips when permitted under the State Chapter 1 Expenditure Guidelines (Board Report 96-0124-PO3), as may be amended.

#### **V. STUDENTS WITH DISABILITIES**

Students with disabilities shall not be denied participation in a student trip solely based on their disability. These students may require additional staff and/or accommodations which shall be provided in accordance with the student's Individualized Education Program or Section 504 Plan at no additional cost to the student or parent/guardian. The principal must make special note of additional chaperones necessary for students with disabilities on the Student Travel e-Application.

#### **VI. TRANSPORTATION**

The following transportation requirements apply to student trips authorized under this policy:

- A. Licensed Carrier - When the total number of students is ten (10) or more, schools must use a school bus or licensed carrier appearing on the Department of Risk Management's Approved Field Trip Vendor list, or CTA or RTA vehicles, or other public common carrier (Greyhound, Amtrak, etc.), or U.S. Military.
- B. Private Vehicles Use - Use of private vehicles for student trips is strongly discouraged. However, when use of a private vehicle is the only feasible method of travel, such vehicles may be used only if the total number of passengers per vehicle (including the driver) is ten (10) or fewer and the following requirements are met:
  - 1. The private vehicle must be a motor vehicle designed to carry no more than ten (10) passengers (including the driver), with functioning seatbelts for each person;
  - 2. No more passengers (including the driver) may be transported in the private vehicle than the vehicle was designed to carry; and
  - 3. Any person requesting to transport students in a private vehicle must receive prior written approval from the principal and the parents or legal guardians of the students being transported. No employee may transport any student without written consent from the principal and parent/legal guardian of the student.
  - 4. The principal shall ensure that the driver holds a valid driver's license and liability insurance of \$300,000 for a vehicle manufactured to transport up to six (6) passengers or \$500,000 for a vehicle manufactured to transport more than six (6) passengers.
  - 5. The principal must retain a photocopy of the driver's license and insurance documentation.
- C. Passenger Vans - No fifteen (15) passenger vans shall be used to transport students or staff.

#### **VII. WATER ACTIVITIES**

- A. The trip must comply with the Board's policy on Aquatic Activity Safety (Board Report 04-0324-PO2), as may be amended.

- B. Non-applicability - This restriction does not apply to interscholastic swimming and diving competitions, nor to trips specifically arranged for swimming instruction taught by Red Cross-certified or comparably-certified personnel as part of the physical education curriculum.
- C. Under no circumstances are students allowed to use sailboats, rowboats, canoes or other recreational boats; this prohibition does not apply to student transport on U.S. Coast Guard approved commercial boat charters.

**LEGAL REFERENCES:** 105 ILCS 5/29-3.1; 105 ILCS 5/34-18; 105 ILCS 5/10-20.13

**Approved for Consideration:**



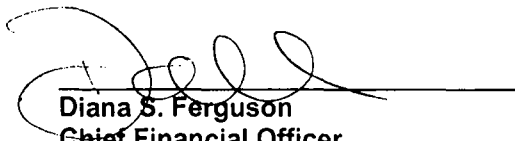
**Barbara Eason-Watkins**  
Chief Education Officer

**Respectfully Submitted:**



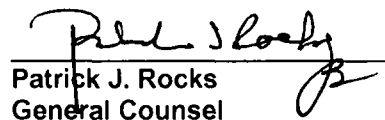
**Ron Huberman**  
Chief Executive Officer

**Noted:**



**Diana S. Ferguson**  
Chief Financial Officer

**Approved as to Legal Form** 



**Patrick J. Rocks**  
General Counsel