



## ADMINISTRATIVE PROCEDURE

---

---

**TITLE: Field Trips and Excursions - Substantiation**

**ADMINISTRATIVE PROCEDURE # 4301**

**RELATED TO POLICY # N/A**

---

---

This procedure provides guidelines for the legitimate and appropriate travel coordination of academic field trips and other excursion travel with students. All field trips and excursions must comply with all Business and Travel Expense requirements as outlined in BP/AP 7400.

### A. Definitions

1. **Trip Leader:** the UCC employee in charge of the field trip or excursion activity. The Trip Leader coordinates travel, including but not limited to: authorization, participant contact, form submissions, and financial planning. In addition, the Trip Leader takes on additional responsibility to ensure appropriate transportation, accommodations, and meals for students. All Trip Leaders agree to adhere to all applicable UCC Board Policies and Administrative Procedures.
2. **Field Trip:** a group activity in conjunction with a course, which includes students and employee(s).
3. **Excursion:** a group activity or co-curricular activity unrelated to a course, which includes students and employee(s).
4. **Athletic-Sponsored Events:** a group activity specifically related to an official College-sponsored sport. Are included in the "Excursion" definition above.
5. **Volunteers:** External persons volunteering to chaperone and assist Trip Leaders on field trips or excursions. See **Section J** for requirements and details.

### B. Procedures to Obtain UCC Travel Authorization for Any Field Trip or Excursion

#### 1. Preliminary Approval

- a. all field trips and excursions require preliminary approval from the appropriate supervisor: Assistant Vice President of Academic Services, Assistant Vice President of Student Services, or Director of Athletics. Out of state travel also requires presidential approval.
  - 1) a memo or email must be submitted to the appropriate supervisor and contain a brief written summary of the nature of the field trip or excursion,

destination, number of students, and any specific details that may make the field trip or excursion unusual.

## 2. Travel Authorization

- a. Completed Field Trip and Student Travel Authorization Packet must be submitted to the Business Office with all supporting documentation, details, and itinerary as detailed on the Field Trip/Excursion Checklist.
- b. Multiple field trips or excursions may be submitted with a single travel form for related trips, including season travel for athletic teams.
- c. All original documents must be on file in the Business Services Office with a copy housed in the Trip Leader's supervisor's office.
- d. Budget Manager will confirm budgetary and insurance approvals are met.

## 3. Briefing Packet

Prior to departing on the field trips or excursions, the Trip Leader must prepare a briefing packet for their supervisor that includes:

- a. A copy of the approved Travel Authorization Packet and all supporting documents
- b. list of the names of all students participating on the field trip or excursion
- c. Student liability waivers and medical forms
- d. Staff, Volunteer liability waivers and medical forms
- e. a complete detailed itinerary including all telephone numbers, hotels, names of transportation providers.
- f. all orientation materials and agenda
- g. *If applicable*: For overnight field trips or excursions, a list of vehicles make, and license plate provided to Campus Security for vehicles remaining on campus.

## C. Time Frames

The Field Trip and Student Travel Authorization Packet generally must be filed with the Business Services Office with a minimum of:

1. Ten Business Days (2 weeks) prior to departure of One-Day field trips or excursions
2. Thirty Calendar Days (1 month) prior to departure of Multi-Day In-State field trips or excursions
3. Three Calendar Months (90 days) prior to departure of Multi-Day Out-of-State field trips or excursions
4. Six Calendar Months (180 days) prior to departure of international field trips or excursions

**D. International Travel – Special Considerations** International travel with student groups requires significant planning and extra attention to safety and security precautions.

1. The College reserves the right to refuse approval for any international group trip for any reason.
2. Approval for travel to any country or location that poses a significant threat to U.S. Citizens will be declined (See <https://travel.state.gov/content/travel/en/traveladvisories/traveladvisories.html/>).
3. Preliminary Approval must be granted before any significant planning or itinerary is designed.

**E. Domestic and International Overnight Travel** Where field trips or excursions require overnight accommodations, certain additional requirements apply:

1. For every 15 students, at least one Trip Leader is required.
2. In no case may any field trip or excursion Trip Leader or Volunteer share a room with students.
3. Only persons approved for the field trip may travel in college provided transportation.
  - a. Exceptions to #3, domestic partners, spouses, parents or guardians may be allowed depending upon the length and purpose of the field trip or excursion; such exceptions must be specifically approved in writing by the Vice President of Academic Services, Vice President of Student Services, or the Director of Athletics.

**F. Orientation Materials** The Trip Leader shall provide each participant with orientation materials at least two weeks prior to departure. The level of detail provided relies upon the type of travel. Both verbal and written communication are essential.

1. Orientation Materials must include:
  - a. Field trip or excursion destination and purpose
  - b. Cost of trip for students – college covered finance and additional student costs
  - c. Travel itinerary: location, dates, route, rest and meal stops
  - d. Lodging information
  - e. Transportation information
  - f. Appropriate clothing or gear
  - g. The established rules and protocols specific to the field trip: any learning outcomes, assignments, any immunization requirements, etc.
  - h. Any known unique hazards

- i. A summary of activities and physical requirements students will encounter
  - j. Any known or unusual circumstances that would require advance preparation or equipment
2. Course syllabi which includes aforementioned orientation information may be substituted for orientation packet.
  3. Group Athletic Team orientations are held once at the beginning of each season.
  4. All field trip or excursion participants shall know how to contact the college from the activity site/destination, find and use the first aid kit, have access to a personal cell phone or other phone, and what to do if separated from the group.

### **G. Transportation of Students in General**

1. As a general matter, affiliated UCC community members and volunteers may not transport students in personal vehicles and college insurance will not cover any property damage, injury, or other claims arising from the unauthorized transportation of students in personal vehicles.
2. Any use of College vehicles must follow Administrative Procedure 6530 "[Use of College Vehicles](#)"
3. All drivers must have a valid driver's license and obey all traffic laws in each state in which travel occurs.

### **H. Suitability of Field Trip Activities**

1. If a field trip or excursion requires activity that might be unusually challenging for some students, students need to know that ahead of time and have the opportunity to opt out or be provided an alternative activity. In no case will students be forced to participate in an activity that poses a danger that they feel they cannot negotiate.
2. Similarly, students with disabilities must always be permitted to participate in field trips and excursions which must be designed in ways that reasonably accommodate their needs.

### **I. Code of Conduct**

1. While traveling and attending conferences and other activities, students, Trip Leader(s), and volunteers shall at all times adhere to the standards of conduct applicable to conduct on campus, including but not limited to college policies on alcohol and drug use, harassment, and sexual misconduct.
2. Any violations of UCC Board Policy or Administrative Procedure must be reported immediately by phone or online reporting forms with additional follow up upon return to campus.

### **J. Volunteers**

1. Domestic partners, spouses, parents, or guardians may volunteer to assist Trip Leaders. Volunteers who have not worked, or participated in a volunteer capacity,

within the past twelve (12) months are required to have background checks conducted. Refer to Human Resources for processing.

2. Volunteers must also provide waivers of liability, medical forms, and agree to abide by all College Board Policies and Administrative Procedures, including driving rules and nonuse of personal vehicles for student transportation.
3. Volunteers must not share rooms with students during overnight field trips or excursions. See E.3.a. for exceptions.

#### **K. Emergency and Reporting**

1. The Trip Leader shall carry the emergency telephone contact list for Umpqua Community College.
2. Should an emergency arise in the course of a field trip or excursion, the Trip Leader is responsible for contacting 911 (if applicable) then the appropriate campus persons on the emergency contact list as soon as possible.
  - a. The Trip Leader should describe the emergency and discuss plans to address the problem.
  - b. The Trip Leader will also document the incident then submit a report immediately upon return to campus. Examples of incidents could include: motor vehicle accident, assault, sexual assault, injury or medical incident, allergic reaction, etc.
3. If the field trip or excursion is three (3) days or longer, the appropriate supervisor may require the Trip Leader to provide a mid-trip report.

#### **L. Cancellation**

1. The Vice President of Academic Services, Dean of Instruction, Vice President of Student Services, Athletic Director, President or designee has the right to:
  - a. cancel a field trip or excursion any time prior to departure or require immediate return for any reason;
  - b. send personnel to the location for assistance;
  - c. contact local authorities in the location of the group;
  - d. or otherwise take action to protect the safety and interests of students, UCC-affiliated community members, volunteers, and Umpqua Community College.
2. Field trip or excursion cancellations include but are not limited to: lack of designated field trip or excursion funding; risk level; failure to follow policy or procedure; low enrollment; or student(s) to Trip Leader ratio. One-day field trips are exempt from low enrollment and student to trip leader ratio cancellations.

## **M. Finance**

1. The Trip Leader is required to meet with the Vice President of Academic Services, Dean of Instruction, the Vice President of Student Services, or Athletic Director and Business Services Office to discuss funding for costs associated with the field trip or excursion.
2. If the field trip or excursion involves collecting money from students, the Vice President of Academic Services, Dean of Instruction, Vice President of Student Services, or designee will assist the Trip Leader in establishing the process for collecting the funds through Financial Aid (if registered for the course) or Student Accounts or the Business Services Office (if student pays individually).
3. The Trip Leader is required to provide an itemized cost sheet to students, staff, and volunteers at orientation.
4. The Trip Leader will coordinate travel arrangements with the purchasing manager, submitting any updated costs to the Business Office.
5. The Trip Leader will coordinate any Travel Advance Request with the Business Services Office prior to departure.
6. The Trip Leader will submit the Travel Expense Voucher, and all receipts to the supervisor within 7 business days post-return. The supervisor will forward to the Business Office.

## **N. Athletic Trips**

The Athletic Department conforms with the requirements as outlined in this administrative procedure, however, due to unforeseen variables of athletic team travel, such as injuries, playoff schedules, rain delay/rescheduling, etc., the Athletic Department may have variations in budget approval and reconciliation practices and take additional internal steps for the safety and security of athletes.

### **RESPONSIBILITY:**

The Chief Academic Officer is responsible for implementing and updating this procedure.

---

**NEXT REVIEW DATE: 2030-2031**

**DATE OF ADOPTION: 10/15/2019 by CC**

**DATE(S) OF REVISION: 4/5/2023 by CC**

**DATE(S) OF PRIOR REVIEW:**