



To: Pastors, Youth Ministry Directors, Faith Formation Directors,
Superintendent of Diocesan Schools and Parish Administrators

From: Brian Lemoi, Director, Evangelization and Lifelong Faith Formation
Chris Pastura, Superintendent of Catholic Schools and Centers
Ryan Phelan, Associate Director of Youth and Young Adult Ministry
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Re: **Catholic School/Centers, Early Childhood Centers, Faith
Formation Programs, Youth & Young Adult Ministry
Guidelines for Field Trip, Retreats, and overnight Trips & Missions**

The usage and definition of the terms **children, youth, and adults, young adults** include the following categories of individuals, who are also defined by the **Diocese of St. Petersburg Policy for the Protection of Children and Vulnerable Adults (Revised July 2017)**:

Children, youth, minor: *Generally, a person less than the age of eighteen (18) years of age. Minors and the combined term “children and youth” are used interchangeably.*

Vulnerable Adult: *A person 18 years or older whose ability to perform the normal activities of daily living or to provide for his or her own care or protection is impaired due to a mental, emotional, physical, developmental disability dysfunction, brain damage, or the infirmities of aging.*

Field Trip or Youth Ministry Trips taken within the boundaries of the Diocese.

In an effort to help maintain a high standard of safety for your staff, youth, and young adults participating in field trips, retreats and camps throughout the year, the Insurance Office, Catholic Schools and Early Childhood Centers, Evangelization and Lifelong Faith Formation, Safe Environment Office and Youth and Young Adult Ministry advise the following guidelines must be followed prior to such an event. Please remember that a field trip for students is a privilege they enjoy and not a right they are entitled to as part of their education and/or experience:

A Field trip sponsored by one of the following programs:

- Catholic early childhood center, elementary or diocesan secondary school, or
- Parish Youth and Young Adult Ministry, or
- Religious Education/Faith formation

Should clearly relate to the school’s basic curriculum, religious education/faith formation goals or Youth and Young Adult Ministry goals, depending on the program sponsoring the field trip. The responsibility for determining the appropriateness of a field trip and deciding whether or not permission is granted rests with the Principal or pastor, whichever should apply, **who should ensure that there is adequate adult supervision according to the ratios mandated by the sponsoring program and that those entrusted with the care, responsibility or supervision of children or vulnerable adults have complied with diocesan policy relative to Level II background screening and Safe-Environment Training.** If the trip’s duration includes a Sunday, the opportunity to attend Mass must be provided for students and adults.

- Before selecting the destination for a field trip, due diligence must be conducted regarding the ownership and management of the facility. This includes knowledge of the physical plant of the facility, as well as the type of activities offered, safety record, and staff ratio as it relates to the activities. Specific activities offered should be within the physical limits and ages of participants attending (e.g. horseback riding, zip lining, white water rafting, swimming, etc.) Facility leadership should not undertake activities that require training or expertise beyond the level of those teachers, volunteers and chaperones in attendance; however, they must remain with participants during any activities at all times even when certified staff of the facility is present.
- A copy of the current insurance certificate for the facility should be obtained, as it relates to both premises liability and liability for the officers, directors, employees and staff of the facility.
- If the facility has an agreement and/or waivers of liability to be signed by the Diocesan entity participating, it should be reviewed and presented to the appropriate Diocesan support office for assistance. The Insurance Office should be consulted with regard to any indemnification provisions. **Agreements should not be signed until the language and provisions in these documents have been analyzed. Unfavorable language may exist that would place the parish and the Diocese in a position of being responsible for all accidents (as defined by the contract) arising from the use of the camp and its activities.**
- Once a facility has been selected, the appropriate school and/or parish consent and permission forms should be utilized by the participants, even if the facility has its own consent forms. It is strongly recommended that both forms be signed by all participants. It should be noted that the facility forms offer consent and protection to the facility, while the parish/school/Diocese consent and permission forms are applicable to the parish and the Diocese. Please contact the offices of Catholic Schools and Centers, Evangelization and Lifelong Faith Formation and Youth and Young Adult Ministry for further assistance.
- The consent and permission form should identify the type of activities and allow parents to withhold consent for specific events. Volunteer leaders/School Staff should assure compliance.
- Volunteer and employees participating and/or supervising the event must be Safe Environment Program trained (<http://www.cmgconnect.com/>) and who have successfully completed a Level II criminal history background check (www.dospsep.org) at least one week prior to the subject trip or activity. It is a good practice to have several back up adults/chaperones that are SEP trained and background screen ready to step in at the last minute in case of an emergency. **(Last minute walk-ins cannot be processed in time).**

Contracts from potential camps should be reviewed 5 – 6 weeks before an event so that any safety and legal issues can be resolved before an outing.

Failing to follow these guidelines exposes the parish/school, pastor and staff to liability for claims and expenses beyond those normally associated with a field trip or retreat. Provisions regarding indemnification by a parish or school should not be taken lightly. The Diocesan Insurance Office and Legal Department are available to assist.

We appreciate your dedication and concern for the safety and well-being of the youth of our Diocese.

Guide Lines for Youth Trips & Trips Involving Overnight Stay

Many of today's activities for our youth involve activities located outside of the diocesan boundaries. These trips provide a fun way to keep kids involved with the church; however, certain risk management steps should be taken to help reduce the potential for liability exposure for the church and/or school. This document is intended to be a resource for the leadership of youth trips to help you be successful and to be able to enjoy your trip as planned.

Field Trip: Defined as any trip that is off the campus of the parish or school entity within the diocese boundaries that does not include an overnight stay.

Youth Trip: Defined as any trip that is off the campus of the parish or school that is outside of the diocese boundaries or any trip that includes an overnight stay.

Mission Trip: Is defined as any team of adult and/or minors organized by a parish or school ministry, whose sole purpose is to travel domestically or out of the country, to offer spiritual, and/or practical assistance to a parish, school or people in need at a specified location.

Approval Process

Due to the complexity in logistics and preparation for these events, it is important that initial plans/ideas go through a review process for approval by the pastor or principal, the Faith Formation or School's Office, and then the Office of Insurance & Risk Management.

Once the trip is approved, Final Information and details should be passed on to the pastor, principal, business manager and parents.

Preparing for the Trip

1. If possible, the designated leader should make an advance visit to the area to assist in foreseeing any potential risks that may be encountered during the trip. Any foreseen or unforeseen problems should be properly planned for in advance. The safety and security of all participants should be carefully assessed. Some areas to keep in mind are: Will additional security need to be provided onsite? What is the distance to the nearest medical facility? What medical services are available? Will the participants require additional vaccinations depending upon the location of the trip?
2. Create a trip binder that includes the following:
 - A copy of this guide
 - Trip checklist
 - Trip itinerary – including detailed activities.
 - Copy of all contracts for facilities, travel, and activities
 - List of all participants – including emergency contact numbers (both adult & youth listed)

- A copy of all signed participation/permission forms, including medical forms, SEP release forms
- An emergency phone list of contacts at the diocese, parish, school entity. This should be a written list in addition to numbers kept within cell phones.
- Copies of all passports of participants when applicable.
- Copies of medical cards for all participants on the trip.

The purpose of the binder is to have all pertinent information regarding the trip in one place easily accessible in case of an emergency. A duplicate copy should be left with the home base emergency contact person. That person should have access to it at all times throughout the trip. (If they are an employee it should not be left at work when off.)

3. Create a plan of action to respond to any emergency. Even the worst case scenario should be thought through to plan a response.
4. Confirm there are adequate facilities for housing all of the participants of the group in one location, including all adult chaperones.
5. Check for any U.S. Travel Alerts/Warnings if trip is planned outside of the United States by visiting <http://travel.state.gov/content/passports/english/alertswarnings.html>.
 - If traveling outside of the United States each individual can register in the US Government STEP Program.
 - What is STEP?
 - (STEP) is a free service to allow U.S. citizens and nationals traveling abroad to enroll their trip with the nearest U.S. Embassy or Consulate. Receive important information from the Embassy about safety conditions in your destination country, helping you make informed decisions about your travel plans.
 - Benefits of Enrolling in STEP
 - Receive important information from the Embassy about safety conditions in your destination country, helping you make informed decisions about your travel plans.
 - Help the U.S. Embassy contact you in an emergency, whether natural disaster, civil unrest, or family emergency.
 - Help family and friends get in touch with you in an emergency.

Note: All participants should be registered not only the group leader.

6. Other considerations to take into account are:
 - Only qualified leaders should drive in the host country.
 - A curfew should be established during the course of the stay.
 - Participants should be in contact with locals only with a leader present.
 - Cell phone/communications should be arranged and tested for emergencies.

- Participants and leaders should be aware of the geography and environment they are working in.
 - These trips should not be led by leaders who have no experience supervising minors within the 14 - 17 age range. Leaders should be at least 21 years of age.
 - Local organizations should be contacted to help provide set up information.
 - If the trip is to a non-English speaking location, arrange to have someone that speaks the language travel with you to translate or hire a translator that can be on-site with you at the location.
7. A waiver of all claims against the Diocese and/or the parish for injury, accident, illness, or death occurring during or by reason of the activity should be obtained from the parents/guardians of each participant under the age of 18.

All individuals 18 and older also need to complete a waiver of all claims which includes a medical release portion.

- Parental Consent for Parish Field Trip
 - Parish Parental/Guardian Consent Form & Liability
 - Medical Release
 - Promotional Media Release
8. All adult chaperones must comply with the Diocesan Safe Environment Program Policies and Protocol. They must have a letter of certification from the SEP that each adult chaperone has a current FBI/FDLE level 2 background check and current SEP training certificate on file with the Diocesan SEP Office. Please see the following attached documents.
- Diocese of St. Petersburg Policy for the Protection of Children and Vulnerable Adults
 - Diocese of St. Petersburg Adult Chaperone Application Form (Request by diocesan group for verification of Safe Environment Program Training & Background Screening of Adult Chaperones.
 - SEP training and background screening request forms requesting verification from outside organizations, i.e. Covecrest, Steubenville, etc. must be processed by the Safe Environment Program Office. Pastors or other staff members are not authorized to verify SEP training or background screening statuses to outside organizations.
9. Determine if any additional insurance coverage will need to be obtained. If this trip will take place outside of the United States, all participants should check with their healthcare provider to ensure their coverage will follow them. If coverage would not apply, arrangements should be made to acquire adequate health insurance coverage for the trip. **Travel insurance should be obtained by each individual.**
10. Two common reasons parents decide to take legal action if their child is injured are a lack of communication and the element of surprise.

Arrange a meeting with all participants and parents/legal guardians (if participant is a minor) to fully explain all details of the trip clearly and specifically as well as answer any questions they may have.

All participants and the parents of minors need to be informed in writing with all details regarding the trip. Distribute an information packet that includes but is not limited to the following:

- Detailed itinerary of the trip to include
 - Cost (if any) including travel insurance
 - Departure and arrival dates and times
 - Trip location and contact information where to be reached in case of emergency. There should be a point of contact during the trip and a designated person at the home parish/school who will be designated as an emergency contact. The home contact designee will have a copy of the trip binder on hand.
 - Names of chaperones including contact phone number
 - Mode of transportation (i.e. airplane, bus, etc.)
 - Accommodations
 - Local dress code if applicable.
 - Parent/legal guardian responsibility
 - Written behavior standards should be distributed to each participant requiring signatures to indicate they have read and understand what is expected of them. In the case of a minor participant, this should be signed by both the minor participant and the parent.
 - It should be mandatory that at least one parent/guardian attend this meeting with the participant.
11. Chaperones should be given a copy of the Chaperone Guidelines. (attached)
12. Participants should be reminded to bring along any prescription medications or other health items regularly used such as allergy medications or contact solutions.

See additional information regarding Medications below.

During the Trip

1. Proper supervision must be provided at all times. What is considered “proper” could vary according to the age of participants and the type of activity. The greater the ratio of supervision there is the better.

Following are the recommended chaperone to child ratios:

- For children in the pre-kindergarten level to the third grade level, the recommendation will be one adult per every 5 children. (As a rule of thumb, the younger the children, the greater the number of adult chaperones required.)
 - For children from grade four to grade eight, the recommendation will be one adult per every 8 children.
 - For youth from grade nine to grade twelve, the recommendation will be one adult for every 10 minor participants.
2. Participants should be divided into smaller groups with a designated adult leader. A binder with medical release forms and emergency contact names/numbers for each individual should be carried by the designated group leader at all times in case an injury occurs.

3. If the trip is located outside the U.S., participants should dress appropriately and according to the customs and dress standards of the country in which you are visiting.
4. be aware of the conditions of local tap water. Boiled or bottled water as well as bottled or canned beverages are safest. Select foods carefully and avoid raw foods that can't be peeled or boiled.
5. Since these trips usually involve some types of repair or construction, the safety of the work-site should be determined. It is important to be aware of your surroundings at all times. There are certain job/duties that would be considered unacceptable for particular age groups. Attached is a list of acceptable and unacceptable work activities according to age.
 - Depending upon the type of job or equipment used, Personal Protective Equipment (PPE) may be needed for the task. All PPE should be provided by the group leader.
 - Participants should dress appropriately for the work they are doing and according to the customs and dress standards of the country in which they are working. Shoes must be worn at all times. Long pants should be worn for any construction type activity.
 - A well-stocked first aid kit should be present at the work site. Supplies should be replenished as needed.
 - Rest breaks should be given to participants as needed. Meals should be provided as well as an adequate amount of fluids to ensure proper hydration.

Transportation

Commercial carrier or contracted transportation is the most desirable method to be used and whenever possible, this mode of transportation should be provided. The use of private passenger vehicles is discouraged and should be avoided if at all possible. If commercial carriers are used (i.e. commercial airlines, trains, or buses), no further information is required. However, if transportation is contracted, signed contracts should be executed with an appropriate hold harmless agreement protecting the parish/school and the (Arch) Diocese. Also, contracted carriers should provide proof of insurance with minimum limits of liability of \$2,000,000 CSL (Combined Single Limit). Contracts and agreements to be executed on a trip should be reviewed before departure by Diocesan Counsel and/or the Insurance Office.

DO NOT ALLOW 11-15 PASSENGER VANS TO BE USED FOR TRANSPORTATION.

If a vehicle will be leased, rented, or borrowed to transport participants, appropriate insurance should be obtained. Bodily injury, property damage and collision coverage should be purchased through the rental company or your local agent.

If a private passenger vehicle must be used, then the following information must be supplied and this information must be certified by the driver in question.

1. The driver must be 21 years of age or older.

2. The driver must have a valid, non-probationary driver's license and no physical disability that could in any way impair his/her ability to drive the vehicle safely.
3. The vehicle must have a valid and current registration and license plates.
4. The vehicle must be insured for bodily injury, and property damage. Proof of current coverage must be provided.

The attached Driver Information Sheet for each driver must be obtained prior to the trip. Each driver and/or chaperon should be given a copy of the approved itinerary including the route to be followed and a summary of responsibilities.

With the exception of commercial or contracted transportation, the daily maximum miles driven should not exceed 500 miles per vehicle. Also, the maximum number of consecutive miles driven should not exceed 250 miles per driver without at least a 30 minute break.

Medications

Self-medication by children is not recommended while on any church/school sponsored activity. It is recommended that one of the chaperones on the trip be in charge and custody of all medications (prescription and over-the-counter) for all children on the trip. This responsibility is detail-oriented and extremely important. While these procedures were designed for schools, we recommend you apply these steps and controls to your trip. Parents need to provide a complete list of medications taken by their child. This should include the prescription number (if applicable), quantity received, drug strength, expiration date and dosage schedule. For over-the-counter medications, they should provide the name of medication, quantity received, drug strength (e.g. 250 mg), expiration date, and dosage. A log should be kept for dispensing the medication including the date; time and signature as the medication(s) are administered, starting with the number of pills received

Note: *We do not recommend you administer shots of any kind.* Children needing this type of medication (e.g. insulin) are fully trained in this process and you are only to observe their administration of the shot to be sure the medication has been delivered.

If you have a child who is allergic to bee stings or suffer from peanut or other food allergies, we recommend you have an epinephrine stick on hand at all times on the trip. Be sure that all chaperones have been trained on how to use this device and are comfortable with its use. In the case of a severe allergic reaction, seconds are very important to successful treatment.

Trip Forms Needed – Included

Trip Checklist – To aid you in your planning

Types of Mission Work Allowed by Age Groups

Incident Report Form - This form should be filled out completely as soon as possible after any accident/injury occurs. It is best to complete this form while all of the details, including conditions and witnesses are still fresh in your minds. See attached. The accident/injury should be called into Catholic Mutual Group as soon as possible 800-228-6108. If you are not able to take a picture of the incident form and send it to your home base emergency contact for them to report.

Parental Consent for Parish Field Trip – Spanish included

Parish Parental Guardian Consent Form & Liability – Spanish Included.

Entity Medical Release – Spanish Included

Promotional Media Release

Code of Conduct for Adults work with Youth – Behavior Standards

<http://dosp.org/safe-environment/code-of-conduct-for-adults-working-with-youth/>

Volunteer Driver Forms

Safe Environment Forms

Diocese of St. Petersburg Adult Chaperone Verification Form – Verification of SEP training and background screening status of chaperones processed by the SEP Office and signed by the Bishop.

- ❖ **NOTE:** SEP training and background screening request forms requesting verification from outside organizations, i.e. Cove crest, Steubenville, etc. must be processed by the Safe Environment Program Office. Pastors or other staff members are not authorized to verify SEP training or background screening statuses to outside organizations.

Please contact the Safe Environment Program Office at 727-344-1611, ext. 5377 or via email at mjc@dosp.org for assistance.

Field Trip – Youth Trip – Mission Trip Check List

1. Initial trip planning:
 - a. Destination _____
 - b. Transportation _____
 - c. Accommodations _____
 - d. Estimated Cost _____
 - e. Itinerary including activities _____
 - f. Insurance needs _____
2. Initial trip planning submitted to the following for approval.
 - a. Principal/Pastor _____
 - b. Diocesan Youth Ministry Office _____
 - c. Catholic Schools & Centers Office _____
 - d. Insurance & Risk Management Office _____
3. Create a trip Binder
 - A copy of this guide
 - Trip checklist
 - Trip itinerary – including detailed activities.
 - Copy of all contracts for facilities, travel, and activities
 - List of all participants – including emergency contact numbers (both adult & youth listed)
 - A copy of all signed participation/permission forms, including medical forms, SEP release forms
 - An emergency phone list of contacts at the diocese, parish, school entity. This should be a written list in addition to numbers kept within cell phones.
 - Copies of all passports of participants when applicable.
 - Copies of medical cards for all participants on the trip.
4. Schedule planning meeting with core team to outline and plan trip.
 - a. View Safe Passage video with core team
5. Schedule initial participant meeting. Additional meetings should be held throughout the planning & fundraising process. In the early stages of the planning meetings the following should be reviewed as tentative plans. At the final participant meeting final information should be distributed.
 - ❖ Detailed itinerary of the trip to include
 - Cost (if any) including travel insurance
 - Departure and arrival dates and times
 - Trip location and contact information where to be reached in case of emergency. There should be a point of contact during the trip and a designated person at the home parish/school who will be designated as an emergency contact. The home contact designee will have a copy of the trip binder on hand.
 - Names of chaperones including contact phone number
 - Mode of transportation (i.e. airplane, bus, etc.)
 - Accommodations
 - Local dress code if applicable.

- Parent/legal guardian responsibility
 - ❖ Written behavior standards should be distributed to each participant requiring signatures to indicate they have read and understand what is expected of them. In the case of a minor participant, this should be signed by both the minor participant and the parent.
 - ❖ It should be mandatory that at least one parent/guardian attend this meeting with the participant
6. Fundraising
 - a. Activities
 - b. Locations
 - c. Goals for group/individual participants
 - d. Insurance needs
 - e. Participant waivers as needed.
 7. Selection of Chaperones/Adults.
 - a. Background checks completed _____
 - b. SEP Training completed _____
 - c. Background & SEP verification forms _____

Note: This step should be started immediately; backups should be included from the start of the planning.
 8. Transportation
 - a. Contracted Carriers
 - Certificate of Insurance needed. _____
 - Contracts reviewed _____
 - b. Volunteer Drivers
 - Volunteer Drive _____
 - Driver Record Check _____
 9. Medications
 - a. Create a Medication spread sheet of who has meds and dosage quantities and times.
 - b. Appoint a chaperone on the trip that will be responsible for medications. This needs to be detailed oriented person
 10. Trip Binders
 - a. Trip Leader
 - b. Home Base Contact – duplicate of all paperwork in the trip leader binder.
 - c. Group Leader binders – information pertaining to individuals within their group, itinerary, participant list.
 11. Send final itinerary and participant list to the Youth Ministry Office at the Diocese