

**Jumping Through the Hoops:  
How are teachers impacted by policies regarding field trips?**

**A Thesis**

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**Master of Education**

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**Carrie Yanishewski**

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## **Abstract**

This research study explored the field trip preparations of teachers including the kinds/types of risk management techniques used, teacher perceptions of field trip policies, and the impact of these policies on their program choices regarding field trips. Qualitative research methods such as a focus group, guided interviews and a researcher journal were used to collect data. The participants were 12 teachers interested in field trips and the policy changes regarding field trips. The findings indicate that teachers in this study have high expectations for the planning and preparation of students prior to taking a field trip. However, these teachers expressed concerns about issues such as risk of litigation, use of waiver forms, unwarranted reactions by school boards to incidents, the time and energy required to fill out forms, and the perception of risk. Some implications of these concerns were that less experienced teachers in the study were more intimidated by the guidelines and paperwork and were less likely to make a field trip a part of their program. Experienced teachers appeared to be demoralized by the lack of confidence school boards have in the decisions they make to plan and organize field trips to enhance the education of their students. Overall, the findings show that restrictions and policies that limit field trips from taking place are considered unreasonable when careful planning effectively eliminates actual risks to the participants.

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## Table of Contents

<b>Certificate of examination</b>	
<b>Abstract</b>	<b>ii</b>
<b>Acknowledgements</b>	<b>iii</b>
<b>Table of Contents</b>	<b>iv</b>
<b>List of Appendices</b>	<b>vii</b>

### **Chapter One Introduction**

1.1 Going on a Field Trip	1
1.2 Topic and Purpose	4
1.3 Research Questions	6
1.4 Significance of the Study	7
1.5 Limitations	7
1.6 Summary	8

### **Chapter Two Literature Review**

2.1 Introduction	10
2.2 What is the educational significance of field trips?	10
2.3 What are good practices for field trip preparation?	13
2.4 What expectations should be set out for students?	16
2.5 What is risk management?	18
2.6 What purpose does a risk management plan serve?	18
2.7 How can risk be successfully managed?	20
2.8 What are the legal principles of risk management?	22
2.9 What are risk management techniques?	24
2.10 What about insurance and waiver forms?	24
2.11 Summary	30

<b>Chapter Three</b>	<b>Research Design and Methods</b>	
3.1 Overall Design	32	
3.2 Researcher's Role	32	
3.3 Site and Population Selection	33	
3.4 Data Collection Methods	34	
3.5 Data Management Strategies	35	
3.6 Data Analysis Strategies	36	
3.7 Trustworthiness	36	
<b>Chapter Four</b>	<b>Findings</b>	
4.1 Introduction	39	
4.2 Teacher background information	39	
4.3 Emergent Themes		
4.3.1 Personal Decision-making/Choices	40	
4.3.2 Field Trip Experiences	41	
4.3.3 Need for Educational Goals/Curricular Links	44	
4.3.4 Field Trip Planning and Preparation	44	
4.3.5 Board Policy Regarding Field Trips	48	
4.3.6 Transportation Restrictions of Field Trip		
Policy	51	
4.3.7 Waiver Forms in Field Trip Policy	53	
4.3.8 Perception of Risk	55	
4.3.9 Benefits of Field Trips	63	
4.4 Summary	64	
<b>Chapter Five</b>	<b>Discussion</b>	
5.1 Introduction	68	
5.2 Discussion	68	
5.3 Implications for Practice		

5.3.1 Training to Conduct Field Trips	78
5.3.2 Consider Risk Management Plans of Teachers	78
5.3.3 Support Physical Education Programs and DPA Initiatives Requiring Field Trips	79
5.3.4 Board Policy Should Assure Teachers and Encourage Field Trips	80
5.4 Summary	81
5.5 Further Research	83
5.6 Conclusion	83
<b>References</b>	<b>85</b>

## **List of Appendices**

<b>Appendix A</b>	Participant Information Letter	91
<b>Appendix B</b>	Interview Guide for Individual Interviews with Teachers	94
<b>Appendix C</b>	Interview Protocol for Focus Group	96
<b>Appendix D</b>	Letter to School Board	98
<b>Appendix E</b>	Peace Wapiti School Board #33 Field Trip Policy	100

## CHAPTER ONE

### Introduction

#### 1.1 Going on a Field Trip

The bus travels ahead of my vehicle as we head out towards the back-country between Chetwynd and Tumbler Ridge, British Columbia. The weather forecast promises to make this February field trip comfortable for our outdoor activities. All the preparations have been made and the superintendent has wished us a “very successful outing”. As part of the leadership course and physical education, I am taking the grade 9 class to an environmental camp for three days. There is no electricity, no plug-ins for stereos, only wood for the stoves in the cabins, a cookhouse with all the amenities of a camp kitchen with propane lights and stove, a sauna, a storeroom of cross-country skis and snowshoes for our use, and bathroom facilities including flush toilets and showers. The students are anxious about going without the comforts of home but I have assured them they will love the experience.

I've been planning these trips for 9 years and I know how much the students will learn about themselves, their classmates and about leadership. The students will cook a meal for the 20 members of our group, cross-country ski on marked trails in mountain terrain below the tree line, snowshoe up a slope working as a team to ensure all the members make it, and build toboggans from cardboard, rope and tape to race. They will also play outdoor games in the snow and the trees, play cards, board games and sit in the sauna to pass the evenings, and then clean all the cabins, the cookhouse, bathrooms and sauna, washing floors, chopping wood, gathering all of our garbage including the kitchen grease to take out with us. We will stop at the indoor swimming pool in Chetwynd to add to our active fun. When we return, the students will debrief

the trip and reflect on the experiences and what they learned. I notice the girls have made a sign to say, “Hi”, to me. I wave back. This is going to be great trip! I hope I’ll be able to go again next year.

My vehicle is following the bus to provide back-up transportation in case a student or adult supervisor is injured. We also need the pickup to take back the garbage from the camp. I do not have any students in the truck with me since the bus is a safer mode of transportation for the students. So I follow behind by myself. There are three adults on the bus including the driver who cannot participate in any of the activities or leave the facility to ensure she can drive us home. I hope she has a good book to read. Our dad on the trip meets the criteria for a male supervisor for the boys’ cabin and he loves the outdoor activities.

I have prepared the students well. They all have lots of outdoor clothes and footwear. They have brought the food for the meal they will prepare. I have given them this opportunity to get to know each other. These students have been in school together for nine years and treat one another much like brothers and sisters. However, this experience puts us all in isolation and literally forces us to work together and really get to know each other. The students have been skiing and snowshoeing in the physical education class to prepare for the activities and we have been discussing relationships and interactions for months in leadership class. The students are ready for this field trip.

Will I be allowed to go next year? Hopefully I will, as long as “nothing bad happens”. What if someone gets injured on this trip? Will they sue the school board and me? I have prepared the students as best I can with adequate supervision. I am confident of the students’ abilities to handle the activities in the terrain. Have I taken all the precautions I need to in order to meet the safety guidelines of the Alberta Ministry

of Education and the Peace Wapiti School Board #33 field trip policy? I have submitted an itinerary for the entire trip and will not deviate from it and all safety guidelines have been met or exceeded. What am I worried about?

I'm worried that next year the perceived risks of this field trip will outweigh the perceived benefits by an administrator. No matter how well the students are prepared, how needed the trip is to develop the skills and attitudes that can only be accomplished on a trip such as this, no matter how "clean" my record is for success on these field trips, the opportunity could be revoked. Why? We are traveling out of province, there is only a satellite phone on site, the camp is in the mountains although below the treeline, and we are a 45-minute drive from emergency assistance in Chetwynd or Tumbler Ridge. Yes, there are many risks I have chosen to take but the actual risks are greatly limited by the setup of the camp, the training of the students and my experience with this field trip. I will have jumped through all the hoops to make this field trip a valuable educational experience yet I could still be denied permission to go.

Field trip planning in Alberta schools has become a risk management endeavour increasingly restrictive in nature. The risk of litigation is a major factor that school boards and insurance companies wish to avoid. Teachers spend considerable time and energy planning field trips to meet the policy of their school boards. A risk management plan requires a thorough understanding of the actual risks involved with the activities and the perceived risks of the participants. As the risk of litigation surrounding off-site school activities increases, the likelihood of school board approved field trips decreases. A teacher who accepts the responsibility for the education and safety of the students during a field trip must have a commitment to safety and risk management. Risk management practices and strategies reflect teachers' leadership

styles and decision-making.

The practices, attitudes, beliefs, assumptions and values of teachers are all part of the risk management strategies surrounding field trip planning. A field trip requires the teacher to lead students towards a successful experience. A teacher in the classroom, responsible for students in a school protected environment, has a different leadership role and set of responsibilities from the teacher who is taking a group of students backpacking with an overnight stay in the wilds of northern Alberta (Green, 1982, p. 5). If teachers “fail to perceive the risks in an activity, then they are less likely to take adequate precautions” and if teachers or students “have an inaccurate perception of risk, then they obviously cannot make high-quality decisions” (Guthrie, 1998, p. 1). Setting high standards of behaviour and relating high expectations to students is an important aspect of the field trip planning process. Lumpkin and Cuneen (2001) suggest that teachers instil moral reasoning as a decision-making faculty in their students. “Examination of one’s attitudes, beliefs and values is an essential first step in understanding why we act as we do” (Lumpkin & Cuneen, 2001, p. 41). This study will examine the impact on Alberta teachers of policies in Alberta school districts regarding field trips.

## **1.2 Topic and Purpose**

Teachers choose to plan a field trip to meet the educational needs of their students within the curriculum outcomes of the course. Field trips are part of the “real world experience” used to complement and support students’ classroom learning experiences and field trips are often perceived as worthwhile experiences. However, teachers are increasingly aware of the risks of taking students off school grounds,

which can lead to liability issues. A risk-benefit analysis may determine that any field trip is not worth it—not worth the hassle, the worry of misbehaviour by participants, and all the planning only to have the activity denied by the school board. “The concept of risk has moved on from probability and consequences, and from threat or danger, real or perceived, into the idea of risk as accountability, or risk as blame and liability, even without fault. “Risk is seen as a personal perception” (Frosdick & Walley, 1997, p. 35-36). Any one hazard can be properly evaluated as low, medium or even high risk. So good safety management means reducing the risks as far as is reasonably practicable (Frosdick & Walley, 1997). The concern is that school boards will no longer allow field trips even as safety and risk management practices and strategies of teachers and their students reduce the likelihood of litigation. “There is a suspicion that ability to pay is as important an issue as negligence in any pre-trial discussions about liability” (Frosdick & Walley, 1997, p. 38). Teachers may choose not to plan field trips even though these support the educational goals of their programs.

The literature surrounding field trips focuses on risk management techniques as necessary for organizers. How field trip policies have affected teachers planning of fieldtrips has not been explored in the literature. Having organized dozens of successful field trips over 20 years of teaching, I have developed several risk management and safety practices, which have reduced the risks to the participants on the trip. As safety guidelines and field trip policy have developed over time and become more restrictive in nature, I have met the conditions in order to continue taking field trips with my students.

My familiarity with the students’ beliefs, attitudes and values is thorough due to the unique aspect of having taught the students for four or more years in a rural K-12

school. Sports teams, leadership groups, outdoor pursuits, class field trips and physical education off-campus trips have been an integral part of my programs. I believe field trips are a key component to the learning experienced by students and, I suggest, are essential components of student memories of school. Field trips are significant to the education of students.

### **1.3 Research Questions**

This study explored the field trip preparations of teachers including kinds/types of risk management techniques, teacher perceptions of field trip policies, risk benefit analysis, critical reflections following the trip and the impact of field trip policies on their program choices regarding field trips.

The study was guided by the following three questions:

- 1) What are the safety and risk management practices and strategies of teachers taking field trips with students?
- 2) How do teachers perceive risk?
- 3) What is the impact on teachers of policies regarding field trips?

The research was conducted in an Alberta school board using qualitative research methodologies. Some specific areas/issues focussed on were: What considerations do teachers take into account to prepare students for field trips and what risk management techniques are used? What risks are teachers willing to take? What are teachers' perceptions of the current policies of their school board regarding field trips? How have these policies impacted their program choices regarding field trips?

## **1.4 Significance of the Study**

This study makes a major contribution to understanding the impact of field trip policy formation on teachers and on the educational choices teachers make. This study is unique because it is the first study to use qualitative methods to explore the perceptions of teachers in relation to policies regarding field trips in Canada. Teachers have been given the responsibility of student care and “are expected to employ the same amount of caution that careful or prudent parents would display in the care of their own children” (Alberta Centre for Injury Control and Research, 2000, p. 3). Teachers may not be sufficiently familiar with their students to share the same moral values, beliefs and attitudes. This study will add to the knowledge of policy impact on the practices of teachers with regards to field trips. Use of school board and safety guideline strategies of safety and risk management to reduce the risk of litigation was explored. The findings of the study address policy formation at the district and provincial level, and provide insights into risk management techniques and teacher practice regarding field trips. These findings could impact policy-making regarding field trips at the district and provincial levels.

## **1.5 Limitations**

A limitation of this study is that all the participants of the guided interviews came from the Peace Wapiti School Board #33, a region of agriculture, forestry and oilfield, characterized by farming communities and one major centre, Grande Prairie, Alberta. The perceptions of risk and the impact on teachers described in this study may not be applicable to more urban settings. Nevertheless, the findings are still relevant. Transferability is the responsibility of the reader based on the detailed description that

will be provided. Another limitation is that the “elite” focus group is “considered to be influential, well-informed people” (Marshall & Rossman, 1999, p. 113) in the Health and Physical Education Council (HPEC). These participants may have been unwilling to share some of their field trip experiences for fear of retribution or career advancement. I assured participants that everything possible was done to ensure anonymity, including the use of pseudonyms in all writing resulting from the study.

## **1.6 Summary**

Field trips and the policies that govern them have made the writer more aware of the importance of risk management and the liability issues that accidents on field trips can create. The purpose of this study is to determine whether these policies are a deterrent to teachers when deciding whether or not to take students off the school property. The significance of the study is that it will be the first to use qualitative methods to gather information from teachers using a focus group and guided interviews. The study is limited by the geographical location where the research was conducted: the experiences of rural district participants may differ from educators teaching in more urban school districts. The number of physical educators taking part in the study may also be seen as a limitation due to the physical activity focus these teachers have for their field trips.

In chapter two, I present a review of the pertinent literature and highlight aspects to situate the study and provide a framework for analysing data. The educational significance of field trips, the preparations required for planning a successful field trip beginning with good practices, and the need for adequate student preparation as a part of risk management are discussed. The purpose of a risk

management plan is examined. The legal principles and techniques of risk management lead into a discussion of insurance and waiver forms. Finally the important information found in the literature as it relates to field trip planning and risk management is presented.

## CHAPTER TWO

### Literature Review

#### 2.1 Introduction

A common educational opportunity for students is a field trip planned and organized by the classroom teacher in order to fulfill a curriculum outcome with a real-world experience to enhance the learning of the students. The literature provides several excellent guidelines for teachers to consider as part of their field trip planning. As the perceived risk for litigation increases, teachers and school administrators are being directed to reconsider their educational choices for all activities. More restrictive policies from school boards are required by insurance companies to reduce exposure to losses. What are the established good practices for field trip preparation? What is a risk management plan? What are the risk management techniques to consider? An exploration of litigation terminology and risk management will provide the background to the increased restrictions regarding field trips. I begin the literature review by addressing the educational significance of field trips. I then discuss the preparations required for planning a successful field trip beginning with good practices, discussion of the need for adequate student preparation as a part of risk management and the purpose of a risk management plan. The legal principles and techniques of risk management lead into a discussion of insurance and waiver forms. Finally, I conclude the chapter by summarising the important information found in the literature as it relates to field trip planning and risk management.

#### 2.2 What is the educational significance of field trips?

The importance of field trips to school programs has been seen as a valuable

educational opportunity for many years (Gass, 1992; Kielsmeier, 1988). School boards recognize that field trips, when used for teaching and learning, provide educationally sound ingredients to the instructional programs in schools.

Properly planned field trips should supplement and enrich classroom procedures by providing learning experiences in an environment outside of the classroom, arouse new interests in students, help students relate school experiences to the reality of the world outside the school and afford students the opportunity to study and explore real situations and processes in their actual environment (Capital School District Policy, 2001, p. 1).

Alberta school board policies describe the benefits of field trips as “valuable educational activities that may be used to enhance student learning and development” (Edmonton Public Schools, 2003, p. 1); “purposeful, carefully-planned field trips are valuable educational opportunities that promote student learning and development” (Red Deer Public School Board, 2003, p. 1), and:

Learning experiences gained outside the school can complement and enhance classroom instruction and can provide a supplementary means for accomplishing both general and specific curriculum objectives. The Board recognizes the educational value of well planned local, provincial, national and international excursions and to this end endorses the conducting of off-site activities involving students, teachers, parents and other volunteers making field trips into the community and natural environments, subject to the regulations and procedures of this policy (Peace River School Division, 2004, p. 1).

Field trips are recognized as an important part of the learning process for student learning beyond primary and secondary schooling. Athman and Monroe (2002)

believe that field trips provide students with cognitive and affective benefits when good planning and preparation are done with the students in Natural Resources programs. In the tourism industry, experiential learning for this field involves student preparation, field trip journaling and photography and analysis and interpretation of the learning in order to apply knowledge (Xie, 2004). In science and engineering, field trips promote active learning where transfer of concrete knowledge and the opportunity to practice new skills is enhanced by instructor preparation (Powis, 1999). Researchers have identified a number of benefits resulting from education field trips, including learning of abstract concepts (Orion, 1993); motivating students through increased curiosity and interest (Manner, 1995); long term retention of concepts improvement (Orion, 1993; Manner, 1995); teaching scientific method by example (Manner, 1995); increasing social interaction between students and between teachers and students (Smith, 1995; Manner, 1995); increased appreciation for the material studied and development of social consciousness (Manner, 1995); and learning for life is seen as practical (Powis, 1999).

A theory of learning that supports the use of field trips as an authentic learning activity is social constructivism (Lave & Wenger, 1991). From this perspective, construction of meanings occurs when more experienced mentors work with students in authentic settings. Experienced teachers can facilitate cognitive growth and learning on field trips by guiding students as they approach problems, encouraging them to think and collaborate. Field trips provide opportunities for experiences in school to be related to out-of-school experiences. Challenges that are based in real life situations that are both interesting to the students and satisfying in terms of the result of their work occur best in the field. Supporting one another in a group and tackling issues and problems

with others encourages and facilitates learning (Kim, 2001).

Learning should include practical knowledge and practice (Wenger, 2004).

Knowledge and skills need “to be presented in an authentic context, i.e., settings and applications that would normally involve that knowledge” (Lave, 1991, p. 2). Well-planned field trips are an important learning method where knowledge and skills are applied in a natural or authentic setting. Field trips include knowledge and practice that is practical. Students learn from experiencing real world situations. Hence, field trips are valued educational or learning practices.

### **2.3 What are good practices for field trip preparation?**

Field trip planning has an extensive background to guide teachers to successful experiences. Many of the guidelines involve preparing students for off-site experiences with the knowledge, skills and attitudes necessary for the students to get the most out of the field trip. The importance of critical reflection following these experiences is essential to the learning. Common sense is a vital part of safety management.

The decision to organize a field trip should be made based on its educational significance and value. Careful consideration of the needs of the students, a plan for reaching the suggested goals set out for the trip and a risk assessment needs to be completed. It is the teacher’s responsibility to eliminate all unnecessary and unacceptable risk, be able to recognize and forestall actual risks, and anticipate and alleviate unwarranted fears in participants (Guthrie, 1998, p. 7-8). Before taking students on an outing, teachers can prepare by carefully reviewing the field trip policies of the school district. Often, these documents outline the necessary steps to take in order to have a field trip approved. “Field trips designed to stimulate student interest

and inquiry and provide opportunities for social growth and development are considered appropriate extensions of the classroom" (Wild Rose School Division, 2003, p. 1). Adequate supervision, preparation of students, communication of trip plans and risks to parents, parent permission, and waiver forms with medical consent, transportation plans and activities planned for the trip with warnings of specific injuries is part of field trip planning. A considerable amount of time is consumed preparing for field trips.

Coelho (2001), Green (1982), Hanna (1991), Judd and Goldfine (2000), Krepel and DuVall (1981), Alberta Education (1992), Calgary Board of Education (1992), and Alberta Centre for Injury Control and Research (2000), have excellent guidelines for teachers to follow for safety and risk management of students in activities.

Compilations of questions teachers need to ask themselves are:

- Do I conduct classroom sessions to prepare students with background knowledge?
- Do I set minimum standards that the individual must meet? Have I informed the group and their parents of the standards?
- Have I given clear and appropriate warnings of specific injuries and all known risks associated with participation in a given activity? Is this in document form? Do these documents also include behaviour, training and performance expectations for the participants?
- Am I familiar with injuries that are common to the activities on the trip and am I knowledgeable about the first aid required for these injuries?
- Have I established criteria for testing/assessing the skills that each person,

including the adult supervisors, must have in order to participate in the activity safely?

- Do I brief the group on the entire plan, goals and objectives? Have I mentally walked through the entire outing?
- Do I know the prior experience and background of all the students in the group? Do I know the medical history and current medical problems of each member on the trip? Where is this information recorded?
- Do I know the level of physical fitness and potential limits of each? Is the group compatible for this type of outing? Do I know the mental make-up of my students? What can I expect from each during stress, discomfort, aches and pains, etc?
- Do I personally check all of the group and individual equipment? Do I exclude people with inadequate or questionable equipment from the outing?
- Are the comfort, safety and wellbeing of every individual in my group always my first priority? What are my motivations for taking the group out? Have I explained them to the group?
- Do I have an established trip plan? Does everyone know? Do I include options and alternatives?
- Do I establish emergency action plans? Has the group been briefed? Who is second and third in command? Do I have established criteria for cancelling or turning back? Have I explained these to the students and the parents?
- Have I followed the established safety guidelines and policies?

Teacher consideration of her or his answers to these questions is significant to risk

management for field trips. By answering these questions in a positive manner, a teacher can be confident he or she has met or exceeded the safety guidelines and field trip policy requirements for the school district. These will also prepare the students adequately so that they are able to get the most out of the field trip experience before, during and after it. Students, I suggest, will strive to meet the high expectations set out for them.

#### **2.4 What expectations should be set out for students?**

Real life experiences outside of the school require students to be confident to explore new surroundings and challenges. The better the students are prepared to face potential risks and understand the behaviours expected, the more likely the chances are that students are going to have a successful experience. The leadership skills practiced in school-based activities can be applied on field trips where working as a team and making good decisions to keep everyone safe can be made real. Having discussions with students about making good decisions to benefit the group are essential to a successful field trip. Reflective discussion on field trip experiences can build the self-acceptance of students and teachers one need to build belief in oneself within a community of learners. “Examination of one’s attitudes, beliefs and values is an essential first step in understanding why we act as we do” (Lumpkin & Cuneen, 2001, p. 41). These reflections can generate self-trust to take on new challenges and know the risks, which lead to healthy choices. When learning matters to the students, they believe what they are finding out is important, and take what they have been told seriously and apply it to their experiences on the field trip. Learning about oneself and how one’s decisions are reflections of one’s values and beliefs is essential to the development of

highly effective people (Covey, 1989, p. 92). Pre-trip, post-trip and ongoing communication of student expectations for learning and behaving will assist students in meeting the expectations for the field trip.

The teacher must consistently make expectations clear to students and reinforce them throughout the trip. Teacher use of the spirit of inquiry and reflexivity that meet policy guidelines provide students with rich, beneficial experiences (Cole & Knowles, 2001). When students know and understand the benefits they can expect from the trip, they will likely be better prepared to take advantage of them. Benefits to students of field trips must be considered in order to do an effective analysis of the actual risks involved. With excellent student preparation, the risks are greatly reduced and the risk of litigation is also reduced.

## **2.5 What is risk management?**

Risk management is a planning process to identify and evaluate risks and selection and implementation of a number of risk management strategies including waivers, checklists, first aid kits and field trip policy. A risk-benefit analysis of field trips is needed. As the risk of litigation surrounding off-site school activities increases, the likelihood of school board approved field trips decreases. A well thought out risk management plan involving the “deliberate process of identifying, measuring and controlling risks” is also the best way to show a court that the teacher is striving to meet the ‘reasonable standard of care’ required by law (Corbett, 2002).

The purpose of risk management is injury prevention. A risk management plan is the best defence an organization can have should it find itself in court defending a lawsuit (Corbett, 1993). There is no one single publication that can provide a teacher

with everything to consider as part of a risk management plan. Every trip is different which makes planning complex. “One-size fits all” does not apply to risk management. “Preventing injuries and avoiding liability requires more than a first aid kit, waiver or insurance policy. Nor are checklists and safety reminders a guarantee that participants will be safe from harm” (Corbett, 1993, p. 2). Field trip policies offer guidance for safer programs and management of risks while reinforcing sound educational practice (Hart & Ritson, 1993).

## **2.6 What purpose does a risk management plan serve?**

A teacher who accepts the responsibility for the education and safety of the students during a field trip must have a commitment to safety and risk management. A teacher in the classroom, responsible for students in a school protected environment, has a different leadership role and set of responsibilities from the teacher who is taking a group of students backpacking with an overnight stay in the wilds of northern Alberta (Green, 1982). The decisions made by the teacher prior to a field trip will greatly affect the experiences of the students during the trip. If teachers “fail to perceive the risks in an activity, then they are less likely to take adequate precautions”; furthermore, if teachers or students “have an inaccurate perception of risk, then they obviously cannot make high-quality decisions” (Guthrie, 1998, p.1). The likelihood of injury is more prevalent when the teacher gives inadequate or inaccurate information to the students. Risk management requires a thorough understanding of the goals and objectives of the field trip by the teacher, students and supervisors in order for a quality learning experience to take place. “We can present occasions that are rich with learning possibilities that allow us to participate with our students as the unfolding of

understandings occur, but we cannot prescribe what is learned as students learn for themselves what is important" (Davis & Sumara, 1997, p. 245). If what is learned by students is that they will never go on another field trip due to poor planning, lack of quality experiences, or lack of student preparation, the teacher has not met the standards of good risk management. Risk management involves knowing the risks and responsibilities of the teacher, students and adult participants and preparing everyone to make good decisions including those that are legal in nature.

Students need to be prepared to make good decisions while on the field trip. Discussion of the types of experiences and the types of decisions that need to be made prior to and during the field trip is important to achieving a successful learning experience. Participants in a field trip want to avoid injury, physically, emotionally and socially. Lumpkin and Cuneen (2001) suggest that youth sport coaches instil moral reasoning as a decision-making faculty in their athletes. How does a person learn to make decisions based on their moral beliefs without first examining those beliefs as a part of a community of learners? "Our job as educators and leaders is not to rely upon 'common sense,' but to teach and employ 'good sense'" (Guthrie, 1998, p. 1). All teachers may not be sufficiently familiar with their students to share the same moral values, beliefs and attitudes. The research suggests that teachers need to know their students well enough to trust the decisions their students will make while participating in a field trip experience. "Professionals must continually strive to provide the safest environment and leadership in delivering programs" (Hart & Ritson, 1993, p. vii). Student preparation to make good decisions will reduce the chances of injury on a field trip.

Corbett (1993) provides many compelling reasons why risk management is

important, besides the prevention of injuries:

1. Litigation is increasing. School boards face the possibility of a lawsuit which is expensive with costs related to time, people, image and good will. Practicing risk management now can help avoid lawsuits in the future.
2. Insurance costs are increasing. A comprehensive risk management program enables an organization to negotiate insurance terms with brokers and underwriters.
3. The shortage of volunteers has become critical. Volunteers are no longer willing to expose themselves to personal liability. (p. 1-5)

Students are changing all the time, whether in terms of numbers, ages, preferences or socio-economic background, which poses a risk to volunteers as they attempt to cope with these changes. In the United States, some states have passed “little league laws”—legislation that protects little league coaches and officials who are sued for negligence. To keep good volunteers, organizations must take the necessary steps to manage risks in their programs. Risk management is good business management to prevent injury and save money, to establish and communicate a positive image, and to meet a moral and ethical responsibility to participants (students), volunteers (teachers), and the community.

## **2.7 How can risk be managed successfully?**

For the development of a risk management plan to meet the reasonable standard of care, the law requires a process that involves all the people in the organization striving to meet the expectations of the plan. The process is basically the same for all organizations: Establish risk management goals; do an inventory of all possible risks;

identify possible measures to control these risks; evaluate risk control measures in light of the magnitude of risk, standard of care, and the resources that you have; select appropriate mix of risk control measures; put measures into effect, and; continue to monitor your risk management system (Kitchen & Corbett, 1995).

Managing risks successfully requires:

- Understanding the legal principles which identify the standard of behaviour required by law;
- Going through a step-by-step management process; and
- Obtaining commitment of management, staff and volunteers to such a process (Corbett, 1993).

The responsibility for risk management is ongoing as facilities, programs, teachers and students change. Any change in the legal standard of care may mean the risk management program might need an adjustment. Relying on insurance or waiver forms may mean overlooking other techniques, which may be more effective and less costly. Corbett (1993, p. 1) states, “A good risk management program is a “mix” of appropriate, reasonable and affordable strategies suited to an organization’s specific needs”. If a teacher is meeting the legal requirements of the standard of care, following the field trip policy of the district, abiding by the *Safety Guidelines for Physical Activity in Alberta Schools*, (Alberta Centre for Injury Control and Research, 2003), and striving to provide an educationally sound field trip experience, the teacher is following a risk management plan.

## 2.8 What are the legal principles of risk management?

The standard of care is the most critical legal principle, which the law imposes upon those who owe a duty to others. To protect students from the foreseeable risk of unreasonable harm is meeting the standard of care. “The standard of care is not contingent on the experience or ability of the teacher. Once someone is in the role of teacher, that person must live up to the standard of care of a reasonable, prudent, up-to-date teacher even if he or she is unreasonable, imprudent and out-of-date” (Carpenter, 1991, p. 9). “An individual’s specific knowledge or experience (or lack thereof) cannot be used as an excuse for his or her failure to meet this standard” (Kitchen & Corbett, 1995, p. 4). Corbett (2002) explains that “the duty to act responsibly remains constant, but the specific behaviour required to meet the standard of responsibility will change with the circumstances, such as the age and skill level of the participants, the degree of supervision of the activity, the environment in which the activity occurs, etc.” (p. 3). When a teacher fails to meet this standard they may be negligent and when a teacher is negligent he or she may also be liable (responsible).

Negligence refers to conduct while liability refers to responsibility for negligent conduct. Legally, a person is only negligent when all four of the following elements are present:

- There exists a duty of care towards a person
- This duty imposes a standard of care, and this standard has been breached
- A harm or loss is suffered by the person being cared for
- The breach of the duty of care causes, or substantially contributes to the person’s harm or loss (Centre for Sport and Law, 2005; Carpenter, 1995,

Cooze, 1989; Corbett, 2002; Hart & Ritson, 1993; Holbrook, Pugh & Gurchiek, 2003; Judd & Goldfine, 2000; Peterson & Hronek, 1992).

Determining what the standard of care is means looking to four sources in any given circumstance:

1. The written standards include government regulations, facility and equipment standards set out by regulatory agencies, policy and procedural manuals of specific sports, programs or facilities and the school or school board's own risk management plan including policies and procedures.
2. The common practices involved with teaching that are unwritten but nonetheless known, accepted and followed.
3. Court decisions made about similar fact situations or case law. Judges may use the same principles as a guide, or precedent, for future decisions where the circumstances are similar.
4. Common sense is the sum of a person's knowledge and experience—and trusting one's common sense is always a good rule of thumb (Corbett, 2002).

Determining whether or not someone's behaviour is reasonable depends on the degree of risk in a situation. Field trip policy and safety guidelines expect the standard of care that a prudent parent would provide using these four sources as a basis. Litigation determines if the standard of care has been achieved.

## **2.9 What are risk management techniques?**

The techniques used to manage risk include reducing the risks involving planning, organizing and influencing human behaviour. Risk management techniques which organizations can devote time and resources are regular maintenance for

facilities and equipment with a program for repair and replacement, strict policy and enforcement of safety equipment at all times and security measures to protect equipment (Corbett, 2002). Signage with warnings of inherent risks, expected behaviours, such as full attention during instructions, and incorporations of relevant standards and guidelines into procedures are techniques to manage risks in programs. When the source of risk is people, careful selection of volunteers working with children and support of ongoing training for teachers, (such as flatwater canoe instructor certification), help minimise risks. These techniques help people continue to meet safety guidelines and apply innovative techniques, “develop and implement codes of conduct, discipline and dispute resolution policies, and develop emergency response plans that identify key roles and responsibilities” (Corbett, 2002, p. 4).

Corbett (2002) states that avoiding risk is best accomplished with common sense. When dangerous conditions develop, postpone events. Avoid travel in poor weather conditions. Restrict younger participants and those who are novices to activities that are lower-risk. Be sure to insist upon quality equipment that meets all established safety standards. Follow the school board policies, activity rules and provisions. All of these suggestions are part of the field trip policies and safety guidelines of school boards. This study will explore and describe the risk management techniques used by teachers in practice.

## **2.10 What about insurance and waiver forms?**

Insurance companies encourage use of risk control strategies. Four ways to control risk depends, in part, on the magnitude of the risks. Smaller risks can be retained quite easily. This financial approach means absorbing the loss, self-insurance,

deductibles and contingencies. Reduction of risk involves the use of management by changing behaviour or the environment. The transfer of risk is the use of insurance, contracts, waivers and leases. When the perceived risk is severe, disengage from the activity, discontinue the program or close the facility. “Decisions about purchasing new insurance, or extending existing insurance coverage, should not be made in isolation from the other strategies which are being used” (Corbett & Findlay, 1993. p. 12). In general, there is a relationship between the seriousness of the risk and the preferred strategy. Retain and reduce strategies are used for low and moderate risks while transfer and avoid strategies are used for higher risks. Promotion of the risk management profile should be ongoing and an integral part of instruction and curriculum development (Coelho, 2001).

The Canada Safety Council (CSC) recommends parents inquire about safety precautions to be taken prior to giving permission for his or her child to participate in a field trip (<http://www.safety-council.org/info/child/schooltrips.html>). The Ontario School Board Insurance Exchange (OSBIE) represents 90% of the school boards in Ontario and advises them to ask the following questions when planning *any* school activity:

- *Risk avoidance* – Do we need to do it?
- *Risk assessment* – If we do it, is it foreseeable that someone can be injured?
- *Risk reduction* – What can we do to prevent injury?
- *Is there any educational value to this trip?* (Canada Safety Council, 2002)

The CSC president, Emile Therien, “thinks liability issues will bring many popular school activities under increased scrutiny” (Canada Safety Council, 2002, p. 1). The most controversy tends to be generated from the activities with little relationship to the curriculum and which have mainly recreation, social or entertainment objectives. “Schools should not sponsor activities with a high chance of injury unless the risks can be removed. If this is not possible, the activity must be vetoed, often to the chagrin of some students and parents” (Canada Safety Council, 2002). Insurance companies and the CSC are working to limit the type and frequency of field trips in which school children participate.

Most disconcerting are activities done during Canadian winters involving snow. The CSC states skiing and snowboarding represent over 40 percent of the injuries reported on school field trips (Canada Safety Council, 2002). Although relatively few injuries occur with snow and ice sliding, they are often serious, accounting for 25 percent of the claims payments for field trips (Canada Safety Council, 2002). Insurance companies define risk management as a “systematic approach to prevent or reduce exposure to losses” (Canada Safety Council, 2001, p. 1). “There is a suspicion that ability to pay is as important an issue as negligence in any pre-trial discussions about liability” (Frostdick & Walley, 1997, p. 4). When a school outing ends in serious injury, a lapse in risk management can usually be identified as the reason for the injury.

How insurance companies determine risk involves identifying and analyzing risks or hazards, and taking steps to remove or control risks that may cause injury. “Evaluating the risk profile of an activity is frequently based on intuition and professional experience, rather than on hard scientific or medical evidence” (Canada Safety Council, 2002). Risk is determined by the likelihood of an injury occurring. Hart

and Ritson (1993) suggest age, skill, experience and level of play will all play a role in determining the level of risk and the type and amount of safety equipment needed. Previous experience, perception of the hazard and perceived likelihood of reaching an activity goal interact to determine whether a person is willing to take a risk. Guthrie (1998) defines perceived risk as the risk perceived by the person, which may be accurate or not. A person may perceive an activity to be risky when statistically it is safe. He explains that many factors affect judgment of acceptable risk including social/psychological factors such as self-confidence, group behaviour, a need for challenge and success, fashion, better equipment and safety techniques and personality traits. Environmental/physiological factors affecting judgment are hypothermia, dehydration, hunger, fatigue, altitude, injury or heat. He also suggests that it is most important for the leader of the activity to know the actual risks to eliminate all unnecessary, unacceptable risk, recognize and forestall actual risks, anticipate and alleviate unwarranted fears and give knowledge to the participants of the risks to learn judgment. Good judgment is learning through experience, theoretical knowledge, critical thinking and reflection upon the experience. "Because there is so little accurate data on the actual risks, insurance rates are often based on perceived risks. These rates may not correspond with the actual risks" (Guthrie, 1998, p. 8). To transfer perceived risks to participants, insurance companies use waivers.

Waivers are somewhat misunderstood documents for many people. Our law says that people can voluntarily assume the physical and legal risks associated with an activity, which is the purpose of signing a waiver (Corbett, 1994). How good a waiver is can only be determined in court. The ethical dilemma of asking participants to accept an organization's negligence by not meeting the standard of care expected may be

unsettling. However, there are situations where waivers cannot be enforced.

Students on school field trips are often minors (persons under the age of 18) and “cannot sign most legal contracts, nor can their parents or guardians sign a contract on their behalf, particularly an onerous contract such as a waiver” (Corbett, 1994, p. 2). “An agreement to participate is a means of informing the participants of 1) the nature of the activity, 2) the behaviours expected of students and 3) the risks involved in the activity” (Cotton, 1992, p. 14). Corbett (1996) offers several recommendations to improve the use of waivers:

- Is this a situation requiring a signed waiver? Perhaps an informed consent agreement or an acknowledgement of risk agreement which asks them to consent to physical but not legal risks is more appropriate.
- Are the risks associated with the activity minimal, due to the nature of the activity, the extent of supervisions or the qualifications of the staff? A waiver may not be appropriate.
- Waivers must specifically state the risks, dangers, hazards which you are asking the participant to accept, including the risk of your negligence.
- Include all the parties to be covered by the waiver such as school board, central office personnel, volunteers, teachers, students, coaches, instructors, etc.
- Develop procedures and guidelines to ensure consistent administration of waivers and ensure waivers are kept in a safe place.
- A waiver is a serious contract so staff must impress upon participants

that the waiver is important. Participants should never be rushed when signing a waiver, nor should they be led to believe that the waiver is just a form which must be signed because of school board policy.

(p. 1-3)

The greatest advantage of a waiver is that it may hold up and transfer liability in the event of a finding of negligence against a school board. It is an excellent educational device, which forewarns participants of the risks they are accepting and the possible consequences. Disadvantages are the ethical reasons stated previously.

Waivers are time-consuming and inconvenient. Good waivers require careful planning and implementation, and do nothing to reduce or prevent injuries. Many organizations place too much emphasis on waivers at the expense of other risk management measures, which may be easier to implement, less costly and more effective in controlling risks and protecting the school board from liability (Corbett, 1994).

Many school boards in Alberta require waivers to be signed by parents. Facilities often use waivers for participants and/or parents to sign. The purpose may be to warn participants of the risk they may face and the potential injuries that could occur. “However, waivers have many limitations including the fact that they have no legal value when used with minors” (Corbett, 2002, p.3) meaning waivers do not provide the risk management necessary to prevent injury or litigation. A teacher who has fully prepared the students for the field trip has met the risk management required to reduce risk.

## 2.11 Summary

The literature supports field trips experiences as worthwhile for students to enhance their learning and understanding of real world situations (Coelho, 2001; Green, 1982; Hanna, 1991). Consistently, the literature provides guidelines for field trip planning that support following safety procedures and policies. The importance of careful, thoughtful planning and student preparation for off-site activities is emphasized. To reinforce learning and curriculum goals, students should reflect upon their field trip experiences and be able to apply their learning to other similar activities. Much of the suggested guidelines are part of a good risk management plan.

Risk management plans help to reduce injuries and prevent losses for insurance companies and school boards. Field trip policies are part of the risk management plan of school boards. The perception of risk by insurance companies and school boards restricts the activities teachers are permitted to do with their students. Use of waivers to transfer the risk from school boards and insurance companies should negligent behaviour occur or should the standard of care be less than acceptable is prevalent in many school jurisdictions. This ethical choice may not best serve the interests of students or educators.

Several risk management techniques exist to reduce injuries. The difference between actual risk and perceived risk has social, psychological, environmental and physiological factors for the participants. Following field trip planning (supported by the literature) ensures the teacher in charge is preparing students for the risks in order to make good decisions and develop good judgment while participating in these experiences. The literature supports field trips to provide real world experiences and outstanding learning opportunities for students to meet and enhance curriculum

expectations (Coelho, 2001; Green, 1982; Hanna, 1991). However, the literature has gaps in it regarding how field trip policy affects teachers, and how these policies impact the programs teachers offer. The impact of field trip policy on teachers is addressed in this study.

## CHAPTER THREE

### Research Design and Methods

This research was a qualitative study. Seven major topics are covered in this section: (1) overall design; (2) researcher's role; (3) site and participant selection; (4) data collection methods; (5) data management strategies; (6) data analysis strategies; and (7) trustworthiness.

#### **3.1 Overall Design**

Using a qualitative design allowed my participants to describe their experiences, beliefs, attitudes and values. According to Patton (2002), qualitative research searches for a deeper understanding of the participants lived experiences. A constructivist inquiry delved into the participants' constructed reality of the impact of policy on field trips and revealed their perceptions, explanations and beliefs (Patton, 2002).

#### **3.2 Researcher's Role**

I am currently teaching at a secondary school where I teach grades 7-12 physical education and grades 7-9 science and leadership. I have been teaching for 23 years. My interest in field trips has developed as the physical education curriculum has encouraged more variety of activity in alternate environments such as wall climbing, kayaking and biking. My leadership classes have active living opportunities in outdoor pursuits such as canoeing, backpacking & hiking and skiing. As the student council advisor, I arrange for several students from student council and leadership classes to attend a provincial leadership conference each year, for junior high and senior high

school students. These experiences have enriched my program with opportunities and learning for students that, I believe, could occur no other way. As a member of the Health and Physical Education Council of the Alberta Teachers Association (HPEC) executive for ten years and currently the past president of HPEC, I have ample opportunity to discuss the latest trends in physical education, health and sport with colleagues from around the province. As president of the Alberta Association of Student Councils and Advisors I promote student leadership and student participation in leadership activities and conferences to enhance their schools. My participation in several field trips over many years has made me very aware of the need for field trip safety and risk management. Nonetheless, I have experienced frustration as board policies have limited the experiences I am allowed to offer my students.

### **3.3 Site and Population Selection**

Since this study was motivated by my personal interest in field trips in my school board, I applied to my school board for permission to conduct the study. I received permission from the Peace Wapiti School Board (PWSB) and the superintendent of PWSB to conduct my research study in their jurisdiction and/or schools. I am also a member of the HPEC, which consists of teachers who have knowledge and experience teaching health and physical education in Alberta schools. I received permission from the table officers of HPEC to have a focus group during the Thinker's retreat, the fall meeting of the council where much of the planning for the year is completed.

Four teachers from PWSB and eight teachers from the HPEC executive were involved in the research. Once permission from the school board was granted, teachers

were informed about the study and invited to participate. An information letter describing the research and a consent form was given or mailed to all participants. Participants who volunteered signed a consent form and returned the form to me. The focus group, consisting of teachers from the HPEC executive, were asked to be interviewed following approval of the table officers of HPEC.

All participants were reassured of the confidentiality of their involvement and they could decide to withdraw from the study at any time. Pseudonyms were used in the written analysis to ensure anonymity. This is important because participants may share experiences on field trips where risks resulting in litigation may have occurred.

A purposeful random sample of one elementary, two junior high and one senior high teacher from the Peace Wapiti Regional School Board #33 involved with planning field trips in the past two years were selected to participate. Each of the four teachers was interviewed. One elementary/secondary teacher from the PWSB was asked to pilot the individual interview questions. This teacher has an extensive background taking field trips and was highly knowledgeable about field trip procedures and safety guidelines. Feedback from this participant helped me practice my interviewing skills and modify questions.

### **3.4 Data Collection Methods**

Data was collected using in-depth interviewing of four individual teachers from the Peace Wapiti Regional School Board #33 and a focus group interview of eight members of the HPEC executive (Patton, 2002). Asking the participants the similar sets of questions, I compared and contrasted their responses. One pilot interview was done to help me refine my interviewing techniques.

According to Patton (2002), “in-depth interviewing facilitates immediate feedback for clarification, uncovering participants’ perspectives, and is useful for describing complex actions and provides context information” (p. 134).

The focus group was a group of eight teachers selected as experts in the field of physical education and health. “Valuable information can be gained from these participants because of the positions they hold” on the HPEC council executive and their vast experience in this area (Marshall & Rossman, 1999, p. 113). A research journal documented my personal reflections of the study and my field trip experiences. These helped provide critical insights into my role as researcher in this study (Marshall & Rossman, 1999, p. 119).

I conducted one focus group that was one hour long and individual interviews with four teachers, two interviews with each teacher. These interviews were conducted during the months of October, November, December and January. The interviews were one hour long and were audio-taped. During the interviews, I welcomed the participants and tried to create a relaxed atmosphere by telling them that I would be asking questions about their field trips and they could refuse to answer any question posed.

### **3.5 Data Management Strategies**

All taped interviews were transcribed verbatim. I read and returned often to the transcripts to search for patterns, categories and themes. Once the transcripts were coded, they were organized into appropriate categories using Microsoft Word. All transcripts have an identifying code to show where the information originated and can be found.

I made multiple copies of each transcript and an evaluation summary of the data

and asked participants to read over for verification. I asked for all documents to be returned in a timely manner. Copies of all data are kept on paper, on disk, and on two desk computers and the laptop computer in my home. The audiotapes, hard copies of data and disks were, and continue to be, kept in a locked cabinet.

I was the only person who worked with the raw data, which included audiotaped interviews and a personal journal. The audiotapes will be destroyed at the end of the study and all written records will be destroyed five years following the thesis defence.

### **3.6 Data Analysis Strategies**

I used inductive analysis (looked at the data to find possible connections that surfaced) to determine the patterns, themes and categories emerging from the interview data. Transcripts were coded with different coloured highlighters as these patterns, themes and categories became apparent. For example some of the emergent themes and categories were transportation, waiver forms, field trip planning, perception and risk and benefits of field trips. Reflections I recorded in my researcher's journal include field trip planning, thoughts and evaluations of my own. The interview data is comparable because the same questions were asked of each participant. The focus group were asked similar questions. I organised the analysis thematically using vignettes and excerpts to support my interpretations.

### **3.7 Trustworthiness**

This study demonstrates credibility in that "the inquiry was conducted in such a manner as to ensure that the subject was accurately identified and described" (Marshall & Rossman, 1999, p. 192) because all the participants were asked similar questions and

the pilot interview allowed me to refine my questions and questioning techniques. The purpose of the research is valid due to the processes and interactions of interviewing teachers from the HPEC executive and the PWSB #33 with interest in field trip planning and policy. All participants were ensured of anonymity and confidentiality. The research is transferable, “useful to others in similar situations” (Marshall & Rossman, 1999, p. 193), due to the nature of the study—field trips occur in every school jurisdiction, policy formation affects decisions made by teachers, and teachers were asked how policy decisions affect their choices regarding field trips. , “The data will help confirm the general findings and lead to the implications” (Marshall & Rossman, 1999, p. 194), of transcripts, audiotapes, and other research and therefore meets the criteria for confirmability. The dependability of this research, “to account for changing conditions in the phenomenon chosen for study and changes in the design created by an increasingly refined understanding of the setting” (Marshall & Rossman, 1999, p. 194), is provided by the information in my research journal as my increased understanding of the information as it emerges. The research journal, follow-up interviews of the four individual teachers and transcript feedback are the triangulation strategies used which contribute to verification and validation of qualitative analysis (Patton, 2002). Use of follow-up interviews as a way of crosschecking the consistency of what teachers said about the same thing over time, is an illustration of triangulating data sources. Another example is that all participants were given their transcripts for feedback, comments and changes. The review of findings by participants is an important form of analyst triangulation (Patton, 2002).

In this chapter, I described the methods used to collect data, manage and analyze the data and site and population choices. I also addressed issues related to

ethics and trustworthiness. I also situated myself in the research as a participant because of my extensive experiences with field trips recorded in my personal journal.

In the next chapter, I describe the findings from the guided interviews and the focus group. Teacher background information and the emergent themes which came from analysis of the transcribed interviews are described.

## CHAPTER FOUR

### Findings

#### 4.1 Introduction

This chapter is meant to present the findings and make sense of the information shared by the teachers of the Peace Wapiti School Board (PWSB) #33 and the executive of the Health and Physical Education Council (HPEC) and do so in a meaningful way. I begin with an explanation of the interview participants and their backgrounds. All of the teachers interviewed are experienced with field trip planning and have organized field trips; most have organized a large number of field trips, many activity-based. They clearly expressed the concerns they have with the current policies regarding field trips and have expressed their views regarding the future of field trips for students. These teachers offered many solutions to the problems they perceived and are hopeful that policy makers will be moved to re-evaluate policies to ensure the future of field trips in their school districts.

#### 4.2 Teacher background information

The data in this study came from several sources: (a) a focus group interview with eight physical education teachers; (b) pre and post interviews with four physical education teachers from the PWSB #33. The interviews began in September with the focus group and with individual teachers over the next four months, from October through January. The focus group consisted of three males and five females from both urban and rural settings across the province of Alberta, who were all executive members of the Health and Physical Education Council of the Alberta Teachers Association. Their teaching experience ranges from two years to over twenty years.

Although most have taught in another subject area, physical education and health have comprised the majority of their teaching assignments.

The four teachers who were interviewed consisted of one male teacher and three female teachers. One has only taught high school, two have taught elementary and junior high and one has taught elementary, junior high and senior high school subjects. Their teaching experience ranges from 8 years to over 20 years. Two of these teachers are primarily physical education teachers, one has an extensive background teaching math and leadership, and one has been teaching mostly at the elementary level for the past 10 years. The range of teaching experience offers interesting considerations for these four teachers with regards to field trips. The extensive physical education background of many of the participants—of both the focus group and the individual interview participants—has provided a wealth of field trip experiences to share.

In the next section, I elaborate on the major themes that emerged from the analysis of data.

### **4.3 Emergent Themes**

#### 4.3.1 Personal Decision-making/Choices

Most of these teachers had personally chosen the type of field trip, the destination and the activities taking place at the venue. “There are some overarching principles .... which is nice because if you put together a good plan and it’s well thought out then you can get approval which is kind of warranted” (Larry, focus group). Only the one elementary teacher felt that field trips were something she had to do and her choice to participate was thrust upon her, whether by the expectations resulting from the history of the school itself or by the administration of the school.

I don't see why I should be made, forced to go on field trips. That is what I feel; I feel I'm being forced to go on these field trips. The day trips—I don't mind so much—but definitely the week-long trips. (Rosie, interview)

The experience a teacher has with field trips appears to affect his or her perceptions of field trip policy.

#### 4.3.2 Field Trip Experiences

The “good old days” were discussed when the trust parents had for teacher decisions with regards to the well being of their child was virtually boundless. Teachers told of being in vehicles without seatbelts, traveling to destinations unknown with an “idea” of camping and enjoying the wilderness. In hindsight, they were surprised at how lax field trip policy was and how lucky they were to have not been injured or have a student seriously hurt.

And I would throw kids into the back of a camper and the owner of the camper throws you the credit card and they pay for the gas and off you go. I can remember driving down the highway going, “Yeah, I really only have one kid in here with a seatbelt. My first year (of teaching), I took 21 kids, 21 girls, camping to a lake with one other person as a supervisor. Really not a lot of structure. These kids had just never had a big lake experience. I couldn’t get them to go to the mountains, jurisdiction wouldn’t let me take them to the mountains, so we camped. We would never be able to get away with that now, even five years later, we wouldn’t (Joe, focus group).

Teacher memories of trips taken during their school years and during their careers suggest the need for field trip policy and the need for professional collaboration to

allow field trips to occur.

Transporting children is a key discussion point throughout the data. One teacher's experience with poor driving conditions which sent her vehicle sliding into the ditch was the beginning of her concerns taking students on field trips (Rick, focus group). Another teacher talked about traveling in the back of a panel van on a bottle drive for her volleyball team (Moonbeam, focus group). Her concerns did not take place on the trip as a student but as an adult looking back with hindsight. The thought of an accident with all the glass bottles and no one wearing seatbelts was unsettling to hear. The more experienced teachers recalled how much fun it was to take kids out on outdoor camping trips, sometimes as the only adult, canoeing, hiking and swimming without any concerns. The teachers with less than 10 years experience have had board policy guidelines to follow with regards to their field trip preparations and appreciate the organization these guidelines provide. They have fewer field trip experiences but have more concerns about taking field trips. "I personally have avoided field trips. I haven't been around for five years, but because I know the hoops I have to jump through, the paperwork I have to do, I have avoided some" (Billy, focus group).

Choice of field trip and the activity taking place on the field trip very much depend on the comfort level of the teacher, his or her personal experience doing the activity and the perception of risk associated with the activity.

Comfort level and past experiences play a part. Having had an accident you're a little more leery. As far as comfort, maybe rock climbing isn't my passion then I might have more difficulty going that route. So I think those are factors as well. (Rick, focus group)

The teachers of younger age groups and the less experienced teachers were much less

likely to pursue any activity on a field trip that they had not done themselves. The idea of planning for a trip that would include outdoor pursuits was considered a daunting task due to the perceived demands of planning and preparation that they were not interested in doing. If the teacher was not comfortable with camping with students, students would not be camping as part of their program. If cross-country skiing on a varied terrain beyond the school-yard was outside the comfort zone of the teacher, the students would remain skiing on the school grounds. The comfort level of the teacher with field trips may determine the types of activities engaged in as well as the length of trip taken.

I've only gone on one major field trip and that was taking my grade 5/6 class to Edmonton for six days. This was not my choice. I was told I had to do this. If it had been my choice I would not have done it. I don't like to take that kind of responsibility especially with 10 and 11 year olds. (Rosie, interview)

More experienced teachers had much more variety in the type of field trips they planned and the frequency of them.

I have done field trips, extended field trips over a weekend, to the Legislative buildings, trips to Edmonton with classes. I just did a fitness one where we went to the Leisure Centre for half a day, an afternoon. I've done lots of those. I've done trips hiking in the mountains. I've done trips skiing. Lots of them. (Jorja, interview)

I'm still relatively in the beginning of my career and taken 3000-4000 [sic] trips in the past ten years counting every weekend. Fifty-two weeks in a year. I probably take 40 weekend trips a year and that doesn't count the phys ed trips during the week. I do a lot of traveling with students; I'm very experienced with

that. (Jerry, interview)

#### 4.3.3 Need for Educational Goals/Curricular Links

All the teachers emphasized field trips had to be related to educational goals that met curricular links in their programs. “If I could put it into my curriculum and come up with a reason to do it and plan it out and prepare it for it and purposely carry through with it, then it’s worth it” (Jorja, interview). “I think that field trips are a very important part of the curriculum, basically, because they offer kids the life skill type activities” (Sofia, interview). “Our field trips have to be linked to curriculum so we can go on a camping trip. The actual activity you want to go to has to be submitted to our ethics expert or our principal and they have to say you have made the appropriate curricular links” (Moonbeam, focus group). “When we have to prove what we are doing educationally, those are very sound, that’s a great trip to go on” (Moonbeam, focus group). This data supports the need for field trips as part of the programs for students. If a field trip is educationally motivated, well planned and prepared for, the learning for students is one of immersion where they are involved in real life situations and experiencing it in a real world setting.

#### 4.3.4 Field Trip Planning and Preparation

One area that every teacher emphasized was the need for planning for any field trip. The success of the trip depended on the approach to planning and communication of these plans to administration, parents and students. “My own field trips that I plan are successful. They are pre-taught for, they are organized, there’s pre-teaching, there’s post-teaching, there’s goals and objectives for why we’re going and what we’re doing

and it's very successful" (Jorja, interview). For many teachers, starting with a budget to make sure the trip is affordable or knowing what fundraising would be involved is the first step once a destination has been chosen. "I always start with a budget. I know that's not risk management but you have to make sure you can afford it" (Jerry, interview). Use of the Internet, personal experience and colleagues with experience traveling to the destination were resources used to assist with planning. The next step is a parent meeting to discuss the trip and make any changes.

I always try to involve parents from the beginning. Then they know what we are trying to do and where we're going to be and why we're going to be there doing that. That's one of the things I do. I always try to make sure the students know why we're going to be there and doing that. We do permission notes. There's pre-teaching and post-teaching done. There's expectations delivered to the students and the parents. There's consequences talked about, if you choose to not follow the rules, this is what becomes of you. I think it's common sense stuff. (Jerry, interview)

Several teachers talked of the preparation of students for the activities they would be participating in. The senior high teachers usually did all the preparation teaching but junior high and elementary teachers counted on trained professionals to lead the students through activities at the venue. "If it's an activity thing, we make sure we go by the activity safety guidelines. In terms of skiing, we make sure all students are required to take a lesson" (Sofia, interview).

The one whole day was dedicated to a summit: wall climbing plus an obstacle course. That was, again, first class. The instructor that was doing the summit was very well qualified to make sure that students wouldn't be harmed in any

way. I was very impressed with that. The staff was very accommodating.

(Jorja, interview)

The behaviour expectations made by teachers for students were another area of preparation that was emphasized. If students know what they are expected to do and how they are expected to behave, they are more likely to meet those expectations during the trip. When parents are informed of the student expectations for learning and behaviour on a trip, they may be more supportive and assist in emphasising the expectations with their child prior to a field trip. Likewise, when parents are acting as supervisors on a field trip, they must know what the expectations are for the students.

You have to have made sure that where you are taking kids, it's safe. You have to make sure that parents know, they obviously have to be made aware of what's going on. You have to have transportation that is safe for them. You have to have organization. You have to have it laid out. There has to be an itinerary, this is going to be happening and it's taking place in a logical progression. Kids are given proper instruction if they're expected to be doing an activity that is outside of their comfort zone. (Sofia, interview)

The constant demands of supervision require teachers to be diligent in "filling the time" for students to keep them busy and on-task as much as possible. The itinerary for any trip must be thorough so that the need for spontaneity is diminished. The perception that "nothing will happen" is no longer a valid reason for doing an unplanned event. Planning is a priority for teachers, especially for field trips.

Ideally, the field trip takes place as planned without any incidents or safety concerns. Everyone arrives back home safe and sound, tired but happy. Students and parents know that the itinerary was followed and the teacher knows the trip met the

learning outcomes and expectations for her students. The trip achieved its educational purposes.

The final part of the field trip process, an important part of the planning, is asking for reflections of students, teachers and parents on the trip. This is the highlight for many teachers when what has been learned is shared as a group. Often these debriefings are seen as team-building opportunities that can only occur on field trips where shared experiences create memories for a lifetime.

What sums it all up for me is I had a great opportunity to take 47 kids to the Chickasha Mountains. I was just a supervisor on the trip. There were sections where we actually had to rope kids so that they could walk across and hang onto the rope. It was a pretty arduous trip. The instructors had gone for eleven years and had gotten every kid to the peak. On this particular trip there were kids who were obese. One kid didn't even have his shoelaces done up I think because it would have been too hard for him to bend over to tie them. I watched this group of grade nine students absolutely nurtured to get to the top. They would take all the necessary breaks, a very safe trip. Gerry had all those things in place. It was such a fabulous trip. The kids would come back and go, "Let me grab your pack. Do you need some water? Can I give you some food?" And one by one, they pulled all those kids to the peak. When we came down from that mountain, another beautiful thing Gerry does is he debriefs the trip. "What was the highlight for you in the last three days? Who helped you get to the top because no one gets to the top without help? Everybody tells their story about who helped them. We get to Joe Jock of the group, he's so cool and beautiful, everybody loves him. "The reason I made it to the top today is because of

Tyler.” Tyler is this obese kid who is at this point (sic) prostrated on the ground, on his back, with his pack still on. This kid pulls himself up onto his elbow. “I made it today because of Tyler. Nobody knows what he has to go through on a daily basis. And what he had to go through today to get to the peak was enormous. When it was hard for me I would look at Tyler and thought if he can make it, I can.” And every kid stood up and gave that kid a standing ovation. That can’t be replicated in a classroom. (Joe, focus group)

#### 4.3.5 Board Policy Regarding Field Trips

Board policies regarding field trips were seen as necessary by every teacher in order for a successful trip to be planned. They were seen as helpful to “rookie” teachers planning their first trips and contained helpful reminders for more experienced teachers to follow. “For someone who’s doing it for the first time I think those sheets are really good to make sure that they’re covering all the safety aspects of the activity, making sure that you go through everything your very first time doing field trips” (Molly, focus group).

Policy is the only thing to ensure system practice. If I go to a school and ... every teacher can do whatever they want on field trips, I know some of those kids are at risk. That’s why Moonbeam signs off every trip to ensure the practice is consistent for everybody in that school. Everyone is going to be safe. I think teachers do it for the safety of their kids and safety for themselves because of the comfort level. If I’m going rock climbing and I’ve never gone rock climbing I want to make sure there’s policy in place. I think it’s to get consistent practice and policy is the only thing that really does change practice.

We didn't wear seatbelts for 50% of the population until it was a legislated policy. We didn't fill out consent forms until it was policy and that's the one document that says you did some homework. Policy drives practice and best practice. It's all about practice. (Joe, focus group)

Teachers throughout the province were aware of school board changes to their field trip policies over the past five to ten years to restrict the types of activities and the destinations of school groups, the mode of transportation and the types of forms required for field trips and off-site activities. For many of the teachers interviewed concerns were expressed about field trip policy and how it has developed. Liability concerns for a teacher when he or she takes students on a field trip were limiting the desire to undertake them. Teachers felt that they could lose their teaching position should a student or parent choose to sue, no matter how a lawsuit ended. These teachers' perceptions were that insurance companies have insisted on these restrictions from boards as a condition to continue providing insurance. The teachers did not think that board policies were unreasonable so long as they reflected the needs of educators and safety for the students.

Types of activities that have been restricted that were allowed in previous years include downhill skiing, hunter education, laser tag, swimming in a hotel pool, canoeing on local waterways, hiking on mountain trails, cross-country skiing in the mountains and camping in the mountains (Susie, focus group; Larry, focus group; Moonbeam, focus group; Sofia, interview; Jerry, interview; Jorja, interview). As an example, the restriction of guns and no longer allowing hunter education to take place was discussed in the focus group. As a result, the loss of laser tag as a field trip option for activity occurred. Having loaded weapons that could cause immediate injury and

death was seen as a reasonable restriction even though no mishaps had taken place over the many years of the hunter education program. Applying the same restriction to a laser tag game was seen as excessive due to the safe environment and protective gear of the participants (Susie, focus group; Moonbeam, focus group; Joe, focus group). Another example was the need for lifeguards at hotel pools. Having a lifeguard was seen as unreasonable when adult supervision was an expectation and the depth of hotel pools was limited (Jorja, interview; Jerry, interview; Sofia, interview). Students miss out on an opportunity for activity as a result. Teachers want to be able to provide students with as many opportunities to be active as possible so that they will be able to make activity choices for themselves throughout their lifetimes.

The perceptions of teachers in this study are that some restrictions are unreasonable. If a teacher can demonstrate the necessary planning to ensure the least amount of risk of injury to participants has been taken, school boards should be willing to grant these teachers permission to take the field trips they would like to do with their students.

I think restrictions, in my district things have been knee-jerk and things have been happening very safely and rifle arm activities are a good example. We've got schools that have been doing this for years. They take them to one of the safest organizations in this province, where the RCMP are trained. And all of sudden rifle arm activities are a high risk activity and all the things you want them to learn is there and they just say no to all that kind of stuff. Even laser tag was a no for a while. Like, give me strength, right? Those kinds of things I found restrictive from our district. (Moonbeam, focus group)

#### 4.3.6 Transportation Restrictions of Field Trip Policy

Transportation of students involved several concerns. Field trip policies were causing teachers to rethink going on field trips due to the cost of using buses. They saw the use of a school bus for a group of 12 students as unnecessary and expensive when a couple of minivans could safely transport the students to their destination. The expense of using a bus and the inconvenience of arranging for travel for day trips, especially with half-full buses, have restricted programming and limited student exposure to activities because of budget issues. Restricting teachers from driving students by insisting on a class 4 license, (professional driver), but allowing parents to drive with a class 5 license (basic driver's license) was also perceived as unreasonable. Placing obstacles in the way such as the school board insisting on the use of buses for students upon arrival at a destination by airplane was an unrealistic expectation for one teacher. Finding a qualified driver to meet school board requirements in an unfamiliar city was viewed as unreasonable. His perception of the risks associated with travelling in the city increased by having his group of students split up into four taxis to travel from the airport to the hotel, then to the sporting complex, back to the hotel, and so on (Jerry, interview). He could not be in all four vehicles at one time but a class 4 driver was driving each vehicle so school board policy was adhered to.

The other transportation issue brought forward was the restriction of 15-passenger vans by many districts. The cost and inconvenience of transporting students by bus was voiced by teachers from across the province. "We have schools in our district that take, literally, 10 kids on a school bus because they will not take them any other way. They don't have school vans or what have you, so they're taking the bus which is very expensive" (Moonbeam, focus group).

We have to take a look at where those decisions are coming from because it may not necessarily be school jurisdictions. It's the insurers who have found not just from what's happened here but most of this stuff has happened in the States. They have found that 15 passenger vans have been determined to be unsafe so we've got insurers saying you know this is unsafe yet you make the decision to use them. (Joe, focus group)

Transportation arrangements including use of vans and private vehicles in order to transport students and equipment would help provide a varied program.

We have the opportunity to do more of the aerobic type activities, the archery range in Bezanson. If we had a van at our disposal, to get there quick and get back quick, we could do that kind of stuff, it would be cheaper .... Right now we're doing two days of gymnastics at the Gymnastics Centre because I don't want to do more than two days because of the bussing. Had we had a van at our disposal where it's cheaper transportation, I would do five or six days of it. It's costing us \$50-\$60 bucks a day just to use the facility. If there was no transportation cost on top of that, we could afford to do a third day or fourth day. With golf, we do one day because it's so difficult to arrange the transportation, having a truck follow you with the golf clubs. (Jerry, interview)

Schools cannot continue to fund the requirements of the transportation policy of many school boards. Program choices are affected by costs. The number of games or tournaments a team attends, the distance of the destination, the number of times an activity can be done in a PE program are all restricted by transportation policies requiring professional drivers and school buses to transport students.

#### 4.3.7 Waiver Forms in Field Trip Policy

Perhaps the issue of greatest concern was the use of waiver forms and other forms required by school boards in preparation for a trip. Although teachers were well aware of the need for policy in order to insure appropriate planning and organization, the need to fill out these forms or submit this information for local destinations or to even leave the school grounds was seen as excessive and unnecessary.

We have rock climbing, curling, archery, golfing, a whole bunch of different activities and the paper work we have right now is kind of frustrating because it takes so much time. But we're trying to compile an off-site form to make it one form to fill out for an activity then only have to change it slightly from year to year. (Susie, focus group)

The frustration of knowing that a jurisdiction located in the same part of the province had a different policy regarding field trips was also voiced.

Still, that's good to know because I think what you've said in there is relative to your jurisdiction. But the forms you would fill out would change from jurisdiction to jurisdiction. There's a huge swing all across the province, 66 school jurisdictions across the province, 66 different policies. In Calgary they've swung way out and are starting to swing back. There is now a generalized field trip form for the field trips that are just crossing the street, field trips that are just part of the phys ed program. Are these field trips where you have to get all the forms filled out and signed or just part of the instructional package? What Calgary looked at for a while was that if you were just crossing the street then it was a field trip. So you have to fill out a form. Then they started to see it was just part of the instructional package so now it doesn't have

to be considered a field trip so that's a big jump. (Joe, focus group)

The need for a simplified field trip form and process is seen as necessary for all school districts.

We had a huge sheet to fill out for everything like going on a walk. If you left the school grounds for walking you had to have a medical release, you had to have your permission slips signed for every single time. But now they can do sort of a blanket one for walking, or in community things like curling, things that are part of our program. (Susie, focus group)

The issue of restrictions regarding field trip destinations was raised less frequently. Some jurisdictions restrict travel by the age or grade of the students (Moonbeam, focus group), while others restrict travel out of the country (Jerry, interview). Some schools have developed their own policy restricting the length of a field trip by not allowing any overnight trips (Jorja, interview; Sofia, interview). Over the time period of the interviews, board policy in the Peace Wapiti School Board #33 had not changed but individual groups had made requests for travel into the United States which were approved. (Jerry, interview) The teachers saw this as a positive development.

The use of waiver forms created some anxiety for the teachers. Their perception was that having to list the possible injuries that could occur doing a particular activity would have to include death. Even though they knew they would not take students on a field trip where they could die, nor would an administrator or school board knowingly approve of such a trip, it was still a possibility. This was a very uncomfortable position for the teachers, asking parents to sign a permission form where death could be listed as a possible injury (Rosie, interview; Sofia, interview).

I wouldn't want to cause fear in people. ....Parents shouldn't be made to feel that something bad is going to happen to their kid because there's a lot of guilt associated with that. What if something did happen? Well, I shouldn't have sent them. I read about that and I knew that could happen, you know. I think communication is great but there has to be a happy middle ground. And I don't think a person should have to jump through a thousand hoops, you know, to take little kids across the street or to go on field trip anywhere. If it's something educationally part of the program, if it's something that they're going to learn from. If there's reasonable risk, I mean, there's, everything in life has risks so if it's a reasonable risk.... I think that it shouldn't be made so difficult for people to go. (Sofia, interview)

#### 4.3.8 Perception of Risk

The perception of risk versus the actual risk for activity was a large issue. Eight of the twelve teachers interviewed in this study felt that if they had "jumped through all the hoops" of the school board with regards to paper work and preparation, the actual risk of the activity would be reasonable for students to take. Teachers have difficulty with policy changes restricting an activity that does not seem reasonable based on their experience with that activity. If teachers are able to provide students with the necessary skills, knowledge and attitudes to prepare them for a safe experience doing an activity, have past experience with students doing a similar field trip and the teacher has a proven record of safety with children, it is seen as unreasonable to suggest an activity is unsafe and can no longer be considered as part of a field trip (Jorja, interview; Jerry, interview; Sofia, interview).

When the question was raised as to who determines what is high risk, medium risk and low risk, teachers knew that they were not asked to do these assessments (Joe, focus group; Moonbeam, focus group). “It is done by insurance companies who don’t teach, who don’t understand the progression of learning” (Joe, focus group).

I think part of that would be to insure that teachers would not have to face that faulty reasoning On our board, people who are not teachers are making these decisions or people who have not been or ever been in these situations are making these decisions. I think teachers should have more input on field trip policy making at the board level. (Moonbeam, focus group)

Teachers are confident the decisions made to plan a field trip will ensure the safety of all participants. They determine the risk and minimize it based on their professional knowledge and experiences.

I think it’s almost safer on field trips in the sense we go through all these things because we have to, which I think is important. I think we do more when we are off location. With 38 kids on a trip you have a certain number of supervisors. In a gym it’s you and that’s the reality. I’ve got one class with five special needs kids: one is a cerebral palsy little girl, another guy that bolts. The other day, he bolted and what do I do? He’s in grade 7 and it was the first time it happened. I thought, “Whoa, okay, so what do I do with you 24?”. (Moonbeam, focus group)

Risk assessment of field trips is inconsistent with the teaching conditions teachers face on a daily basis, especially teaching physical education.

It is agreed that there is risk in everything. A person could get hurt walking down the hallway of the school if they tripped and fell. Accidents do happen.

When you talk about risk I think about triple classes in the gym. There are risks everywhere you go. They could bang their head on the wall and then you would have to deal with a head injury right there. I've never seen a kid get hurt on a trail or mountain climbing. It's not that there isn't risk, it's just what we value.

(Susie, focus group)

The perception of how risky an activity is varies from school board to school board. Eight of the teachers interviewed perceived that the insurance company insuring the school board drives these decisions. All of the teachers interviewed believed how an insurance company perceives risk is often out of touch with what occurs on field trips.

Teachers perceive that there is risk in anything that is done. In fact, several commented on the common occurrence of injuries in the course of a school year in the gymnasium as opposed to the irregular occurrence of injury on field trips. Although teachers emphasize safety and have procedures in place to prevent injury, accidents do happen, everywhere.

Consistency amongst policy makers regarding field trip policy would provide fairness. An understanding of how policy is decided upon with regards to field trips would be valuable to teachers. Eleven of the twelve teachers interviewed viewed policy makers as reactive rather than reasonable with regards to their decisions regarding field trips. The term "knee-jerk" was used often to describe the response of their school board to certain situations they had encountered (Larry, focus group; Moonbeam, focus group; Rosie, interview; Jorja, interview).

Teachers are very giving people, and contribute their time and their experience to work with their students. Organizing field trips requires substantial time commitments to prepare students, make arrangements, inform parents and

administration of details, and ensure safety guidelines have been addressed. All of this work is done away from their own family, during their own time. Teachers volunteer many days and nights away from their own families, without compensation other than the satisfaction of giving students a great learning experience. The morale of teachers is affected by the field trip policies in their districts and the genuine fear of losing their job if an accident should occur while on a field trip. When asked how field trip policy changes affected them personally and professionally, “I guess basically there’s a fear. There’s fear. There are more liability issues. People are getting sued. I guess you’re more frightened to take kids places if you know that” (Sofia, interview). “It’s been frustrating. It’s very difficult trying to arrange things” (Jerry, interview). “I can deal with the rules and so forth, but I think that it’s progressively getting more stringent. It makes me believe that we are leaning towards not going at all” (Sofia, interview). “I’ve noticed over the years, they’re just getting, everyone is paying such close attention to every little, tiny, tiny detail that it’s just getting to the point where people are not going to bother because it’s too much hassle” (Sofia, interview). These teachers did not like school boards to react to situations without thinking about how those decisions will impact everything else.

I think sometimes the policy makers within our school board are reactive and they are not necessarily reacting to things that have happened in our board. But they’re reactive rather than rationally thinking about what situations are. (Jorja, interview)

Instead they wanted school boards to realize risks are a part of every day living and often the occurrence of an accident causes an over-reaction by the board.

I just wish it could be tempered with some realism. Sometimes we expect more

of a school than any other organization. These are kids, they're going to get into things sometimes and get hurt sometimes and that's part of being a kid. Let's go back to the skiing because that's a great example. You provide those opportunities and that kid is ten times safer on that trip than if they go with a bunch of friends or even with their parents. At the same time, we can't plan for every little thing, a tree jumps out on a slope, it happens. Just to realize that happens and not to do that knee jerk stuff. (Larry, focus group)

When a teacher has a plan, wishes to go somewhere to enhance the learning of students, the likelihood of the school board making allowances for the risk assessment done by the teacher seems remote.

You do a risk assessment, you come up with a way of solving that risk so asking permission is fine but the answer is always, "No. No. No." Instead of me saying what the problem is and the people on the board working with you to come up with a solution to that problem it's just more hurdles. (Jerry, interview)

"My concerns about field trips are that eventually we'll have none. We'll be so red-taped that nobody will find them worthwhile except for kids and they don't have a lot of power" (Jorja, interview). An experienced teacher who has taken several successful, safe field trips over a number of years is concerned when his/her professional request is denied after he/she has demonstrated a clear risk assessment following school board policy.

Two teachers, one with less than five years experience in the profession and one with less experience with field trips, were less concerned about the restrictions of field trip policy. They were happy to use a school bus and would not consider taking students on a field trip doing an activity that the school board has deemed to be unsafe.

In fact, four teachers, three with less than ten years experience, would like the school board to outline exactly what activities would be appropriate for students at various grade levels and name the destinations that each grade should consider as possible field trip destinations (Rosie, interview; Susie, focus group; Billy, focus group; Molly, focus group). These teachers are concerned with potential negligence should an accident occur. They are not comfortable with the thought of being sued and losing their jobs. Even though they adequately prepare and organize their field trips, these teachers are very concerned that something will go wrong, no matter how well planned the field trip is and they will be held responsible (Rosie, interview). For these teachers, the risk is not worth it. The thought of having to plan a field trip outside their area of comfort is unnerving. They are well aware of the benefits of field trips but they are less willing to take the risk of leaving the school to take field trips.

They, [the school board] they have to deal with all the legal issues, all the liability issues.... They have to deal with anything that's going to be a lawsuit or negative publicity or anything like that. In some ways, sometimes, it's easier to make more rules and regulations and make it so difficult, make it so hard to go that ... for some people, many people are going to find it not worthwhile.

They [teachers] are just not going to bother doing it, .... I think they [the school board] just don't want to deal with those liabilities and they don't get, they don't have the beauty of seeing first hand, the benefits field trips can offer kids.

(Sofia, interview)

Along with the concerns for experienced teachers in the profession, these teachers are concerned about the future of field trips as new teachers enter the profession. If experienced teachers are becoming leery of taking field trips due to the

risk of litigation and the ever-increasing paperwork, it seems less likely that new and less experienced teachers will plan field trips as part of their program or for extracurricular voluntary involvement.

This is what worries me, for people who are just starting out now they are afraid to take a field trip because they are afraid to be with a group of kids and have an accident and take all of that onto themselves. You know, those kids, those rookies, those novice teachers with the field trip policies we have and the administrators saying, “No, no, no.” I don’t know that our kids in our schools are going to get the benefits of those field trips because everybody is not going to be like me and say, “No, we have to do that for those kids.” That’s what worries me. (Jorja, interview)

The experienced teachers believe that there is help available for teachers when deciding to plan a field trip. Having knowledge of the safety guidelines is important for all teachers and a “great go-to document” (Moonbeam, focus group).

With the influx of all those new teachers coming in, it is imperative that they know where this information is. When you get a turnover in a jurisdiction like that that’s when people start doing this or start doing that, well you had better find out what you can and cannot do in your district. You had better have the PD for those people in that district so they understand where their supports are. (Moonbeam, focus group)

Professional development to support planning for field trips is seen as an important in-service for teachers. Some of the messages teachers are receiving are not supportive of field trips.

Some of the PD that’s out there can be pretty scary when you start talking about

risk analysis and assessment. A buddy of mine went to one at our teachers' convention and came out of there saying, "Why in the heck would I do anything? I could get sued for this and this and this!" (Larry, focus group)

Why are these teachers concerned when field trips are not legislated as part of the education of a child? The teachers in this study know field trips are valuable experiences for students. They know this from the reflections of their students following the trips. "They look forward to them" (Moonbeam, focus group). Students often want to know when they can go again (Rosie, interview). "And we're doing it all for the kids, it's something we have a passion for, obviously, but, at the same time, when you come back you know those moments that we had to live with those kids, that's why we do what we do! We all have made the sacrifices but it is worth it" (Moonbeam, focus group). Benefits of field trips for students and teachers extend beyond the school.

As adults, students often come back to these teachers with their memories from their school days. After the teacher has finished teaching a student, whether to the next level of secondary school, college or as men and women, the memories of field trips are close to the surface.

We had a former student of ours die, and a teacher from our school went to his funeral. His older siblings were there and she had brought yearbooks and stuff and they were going through them. They were talking about all the things that had happened on the trip, on the ski trip. That's what field trips are all about, building memories. The kids, that's something they take with them and they cherish the rest of their lives. (Sofia, interview)

In school, students might not remember some of the facts taught to them in the

classroom, but, I suggest, they will always remember the field trips they went on and share their happy memories.

#### 4.3.9 Benefits of Field Trips

The participants of this study cited many benefits of field trips. On field trips, students may

- spend time with their classmates,
- learn how to use the room key,
- share a room,
- sleep with a “snorer”,,
- manage their meal money or their meal portions,
- take responsibility for their own behaviour
- monitor the behaviour of others at times,
- travel on an airplane,
- ride in a taxi,
- meet new people from different ethnic groups,
- learn to be pleasant in a group
- and be responsible, away from mom and dad (Sofia, interview; Jerry, interview; Jorja, interview)

Students are given opportunities to try new things that could become lifelong endeavours. The championship curling team or the small, wiry boy excelling at wall-climbing, going to the dump or experiencing foreign cuisine are examples of how taking students out of the school can be very fulfilling experiences (Moonbeam, focus

group; Larry, focus group; Joe, focus group).

Students receive these kinds of experiences through field trips. I just want to say let's keep doing field trips and let's keep kids learning outside of our classroom because there are lots of places they can learn and benefit from in their education rather than being in our school building or on our school grounds.

Having a campfire and sleeping under the stars may not sound like they're learning anything, but, man, do they ever come back with a wealth of knowledge of what that is and that's good for kids. (Jorja, interview)

There are many benefits of field trips as cited by these teachers. Many of the positive experiences of a field trip for a student can only be experienced outside of school. These teachers believe when a trip is well planned, the benefits to students are excellent.

#### **4.4 Summary**

The findings from this study indicate that teachers have high expectations for the planning and preparation of students prior to taking a field trip. The policy guidelines of school boards regarding risk management techniques are considered to be excellent for all teachers to refer to when considering a field trip. Teachers expect parents to be informed of all field trip activities, itineraries are followed, safety guidelines are followed for activities, educational goals and curriculum are carefully tied to the field trip, and students are well prepared to learn from and enjoy the activities on the field trip. Following the trip, reflection by students is also important. Provision of planning guidelines by the school board is considered to be necessary. Restrictions and policies that limit field trips from taking place are considered

unreasonable when careful planning effectively eliminates actual risks to the participants.

Teacher perceptions of unreasonable restrictions regarding field trips focussed on transportation issues. Requirements for licensing, use of school buses for transporting students and restrictions on the types of vehicles that can be used were especially limiting to field trip planning. When funds have to be raised or taken out of a limited budget to pay for transportation with a bus, the number of field trips and the distance that schools can afford to travel are limited.

Waiver forms are a requirement for every field trip, requiring parents to sign their agreement to the possible risks that their child could face during the field trip. Teachers believe that waiver forms do not limit risk to students. Waiver forms list the possible injuries that a participant could face without consideration of the training and preparation the students have received in preparation for the trip. Subsequently, parents are asked to sign the rights of their children away should an accident occur. This is morally wrong and unnecessary. School boards should be developing good relationships with their parents not trying to escape responsibility should an accident occur.

School board policy regarding field trips did not create confidence among teachers planning them. Teachers felt that decisions to approve or disapprove a field trip were inconsistent. Depending on the situation, one school board may allow activities that another school board in the same part of the province will not allow. Restrictions occur based on one-time incidents, some which had not even transpired with students from the school board. Teachers in this study believe that when accidents do occur, careful examination of the incident is required to prevent a further mishap. In

this way, everyone involved can learn what to do another time to ensure a more successful trip. Cancellation of all future activities of similar type should not be the result.

Having to deal with the inconsistency of decision making by the school boards has made teachers in this study discouraged and disheartened. Morale among teachers is slipping, according to the participants, experienced teachers who have a passion for their subject area and organize several field trips a year for their programs are reconsidering their decisions. There seem to be too many factors limiting field trips, making them more and more difficult to occur. Teachers interviewed take time away from their own families, plan for substitutes in their absence, use their own time and, often, their own resources to enrich the learning and educational opportunities of their students. According to twelve of the participants in this study, school board policies regarding field trips are becoming so restrictive that even the most dedicated field trip planners are becoming leery.

Teachers who participated in the study also expressed concerns about losing their jobs should an accident occur. School boards are very clear that liability is a huge concern that they would like to have eliminated. Experienced teachers do not feel any security for their positions at their schools when planning a field trip and less experienced teachers are afraid to even consider taking on a new field trip. It was believed that planning for safety and risk management on a field trip would greatly limit the likelihood of an accident occurring, but should an accident occur, teachers believe the school board will not consider this planning with regards to the teacher's future employment. If teachers are insecure, the likelihood of field trips continuing for students is more remote.

The participants in this inquiry believe that field trips benefit students and they believe that students and parents appreciate the effort and time taken to plan an excellent field trip. Spending time with peers in a new setting, whether applying established skills in a real life situation or experiencing a new activity that can only be done away from the school, is beneficial. Students learn many things incidentally, like managing a room key or getting through an airport terminal to catch a flight, which will benefit them in their adult life. The memories made from field trips are for a lifetime. The best education often occurs on field trips and teachers would like to be able to continue to offer field trips to their students. Currently, school board policies discourage teachers in this inquiry from taking field trips.

## CHAPTER FIVE

### Discussion

#### 5.1 Introduction

This study explored the impact on teachers of restrictive field trip policies. A focus group consisting of eight teachers from the executive of the Health and Physical Education Council of the Alberta Teacher's Association and four teachers from the Peace Wapiti School Board participated in the study. In this final chapter, I discuss the findings in relation to (a) my personal perspective as a teacher taking field trips, (b) the impact of field trip policy on teachers, and (c) the literature. I conclude by highlighting some of the implications of the findings for practice and policy.

#### 5.2 Discussion

Throughout this study, my belief that teachers were being impacted by field trip policies was confirmed by casual discussions with colleagues, parents, friends and students. I heard about the paperwork needed to walk a few blocks with a class; the lack of spontaneity for lessons like a walk to the local natural area to observe the wonders of nature that no amount of planning could prepare for; the disappointment for students as activities they had prepared for were suddenly disallowed due to perceived risk by administrators, and the lack of awareness of parents of the restrictions teachers face in providing field trips for students. “The kids decided to drop the cultural exchange and drop out of the program...I will not be doing any more of the organization or planning for this group. The parents will have to work out the travel plans. I’m done” (Yanishewski journal, December 10, 2004). My own experiences throughout this school year document some of my own “trials” and frustrations with organizing field

trips.

At my school, we were unable to take our grade 9 three-day canoe trip down the Peace River as we required recertification and were unable to find an instructor. Fortunately, a new employee at the local provincial park could certify others and eight adults now have the necessary credentials to continue our annual canoe trip. Two teachers and six community volunteers believed this trip was important and spent one weekend of their time so that the students at my school can continue to build memories and experiences for a lifetime. The students expect that the teachers will take them on this field trip. Camping outdoors for two nights, eating outdoors, no showers or toilets, canoeing for three days, rain or shine, is “required” learning as far as these students are concerned. The high school outdoor education class completed a three-day canoe trip on the Peace River in the fall of 2005. Our school is the only school taking such a trip in our school district due to our local school administration support. It is feared that new policy will be coming which will disallow our involvement in canoe trips. This move will likely not be seen as fair or just by several teachers, students or parents.

A friend of mine talked about her son’s recent trip to San Francisco with his band. She met him in Edmonton at the airport and this boy talked non-stop for four hours on the way home. This boy who rarely strikes up a conversation of any length was excited and happy to share his memories and skills learned on this field trip. My friend was thrilled and hoped every student would have an opportunity to go on a field trip like this one. I fear that her hopes will not be realized.

As the results of this study show, teachers are being negatively impacted by field trip policies, which they think are restrictive, time-consuming or unreasonable. Many teachers were “turned off” the idea of having field trips at all. In the staff meeting

held on November 7, 2005, at my school, teachers were informed of new policy guidelines and waiver forms that will be adopted by the school district this year. The reaction of the teachers at this meeting, mirrors the responses of teachers from the focus group that have already experienced more restrictive policies regarding field trips: The amount of paper work and the concerns about the possibility of litigation are going to keep these teachers from taking field trips with their classes.

The field trip experiences the teachers discussed in the interviews were primarily activity-based, tied to physical education or sport teams. Volleyball teams, basketball teams, outdoor education trips, bowling, wall climbing, golf, and even horseshoes were given as examples of the activities done as part of field trips. Some had experience with taking students to leadership conferences. A few teachers had taken students on field trips to experience educational destinations like the provincial legislature, Fort Edmonton, museums and wildlife parks.

Although these teachers have taken field trips with their students, the data revealed that there are several factors affecting the type of field trip, the destination, and the activities taking place at the venue. Personal decisions and choices were part of the planning of any field trip, part of the risk management. Consideration of the education significance of the trip and the curriculum goals achieved, planning for students needs, providing necessary knowledge and skills to ensure a safe excursion, setting out behaviour expectations for everyone on the trip, and planning a time for reflection following the field trip were important to the success of the trip for many of the teachers interviewed. Besides the organization and planning done by the teacher, the impact of school board policy was significant.

Field trip policy brought forward many issues for teachers. Although the need

for policy was seen as necessary to ensure certain safety expectations were being met, several concerns were expressed:

- restrictions on the type of transportation,
- restrictions on activities that were seen as unreasonable,
- use of waiver forms,
- restrictions on destinations,
- the financial costs of meeting these policies,
- the expenditures of time and energy to plan field trips that will be worthwhile for students, and,
- the perception of risk versus actual risk, whether by the school board, the insurance companies, the administration, the parents or the teacher may vary significantly.

Teachers wanted to be trusted to have done adequate risk assessment and prepared students for the challenges they might face on their field trip, instead of being denied the opportunity to explore the world and provide an educational opportunity to be remembered and cherished for a lifetime. The many benefits of field trips and the importance of them as part of a child's education, was expressed repeatedly and many wished school boards would allow and encourage more field trips for their students. Teachers were concerned that the very future of field trips was at risk as a result of the restrictions placed on teachers and perceptions of risk involved with regards to taking students on field trips. The decision whether to plan a trip at all has become the point to ponder.

The major themes that emerged from the data analysis were also supported by

similar findings in the literature. Teachers believed field trip policy was necessary for risk management planning to reduce actual risk, which is also reported by Hart and Ritson (1993), Corbett (2002) and Coelho (2001). Management of risk is necessary for reduction of risks for teachers, students and school boards. Taking students on a safe and enjoyable field trip requires an educational benefit to students as well as good planning. Field trip policy should provide teachers with the guidelines to assist in the risk management planning.

For many years it was not uncommon for a teacher to use his or her own personal vehicle, usually purchased with the most seatbelts and storage available, to transport students on sports trips and as part of a class trip to an activity away from the school. The teacher would have the necessary insurance liability and maintain an acceptable driving record. The school board would only allow use of private vehicles with a parent driving or a teacher with a class 4 licence. In September 2005, the Peace Wapiti School Board reversed the need for a teacher to have a class 4 licence allowing teachers to drive students in their own private vehicle. Schools would use large passenger vans to transport teams to their games during the week and to tournaments within the district and beyond. Schools and school boards functioned well with these arrangements. The Peace Wapiti School Board #33 (PWSB) has disallowed use of these large passenger vans, encouraged purchase of 18-passenger buses, requiring a class 2 (S) license, the same requirement of bus drivers for the school division. The other option is to use a school bus, which requires a bus driver and the expense of \$1.50/km. traveled. For many schools in the PWSB, travel to the closest school is an expense of over \$150, for some schools the cost is closer to \$400. This was considered an unreasonable expense for schools, students and teachers.

Bus drivers need to be paid for their work and time. Teams and schools must fundraise to pay for this extra safety feature. Teachers are well aware of the increased safety that results from use of these vehicles but they are also aware of the huge costs of using these vehicles, which often restricts the types of field trip, the frequency of field trips and the distance needed to travel to do the field trip. Policies that restrict the use of private vehicles by teachers do not enhance programs, in fact they diminish the quality of the programs by restricting the number of opportunities for students to participate in activities and the kinds of experiences offered to students. Teachers in this inquiry want to offer students the best quality experiences possible to enhance the students' education.

School boards usually support the need for field trips to enhance education (Capital School District, 2000; Wild Rose School Division, 2003) and teachers believe the educational value of field trips to students is significant (Gass, 1992; Kielsmeier, 1988). For years, schools and teachers have planned and organized field trips to take students out of their schools to experience learning and develop a variety of skills to enhance the learning of students. Field trips provide students with the opportunities to apply their knowledge, skills and attitudes to real world situation.

Hart and Ritson (1993) and Lumpkin and Cuneen (2001) encourage student preparation as an important part of the planning process. The teachers interviewed for this study believed student preparation was the most important risk management strategy they had. If students know what to expect and how to act, they will be prepared to make good decisions in those situations. However, less experienced teachers may not feel they know the students well enough to trust student decisions on a field trip. Teacher preparation to make field trips safe and enjoyable for everyone needs to be

addressed by school boards. The perception of risk by teachers comes from lack of confidence and lack of experience. In-service sessions for teachers on planning and conducting field trips would be beneficial for less experienced teachers who then might feel comfortable enough to encourage field trips.

The perception of risk and insurance company requirements are seen to be the driving force of field trip policy (Guthrie, 1998) and the evaluation of risk is not based on actual risks or the preparedness of teachers and students to face any risks they may encounter on a field trip (Canada Safety Council, 2002). Yet, school boards and teachers believe that student preparedness is key to risk management, which the literature supports. Teachers believe the insurance companies drive field trip policy and they feel field trip policy restrictions are often unreasonable based on the actual risks field trips present. Consideration for the risk management planning done by teachers in preparation for field trips is not considered by the insurance company; only the perception of the risks involved is considered, not the planning to manage the actual risks. At the November staff meeting, the administration delivered the latest waiver form template required by the school board to be filled out by parents. Along with this six-page document, teachers will become responsible for filling out several other forms to meet the policy guidelines required by insurance companies for field trips. It was made clear to me at that meeting that getting approval to take a field trip was going to become a very tiresome task for teachers.

The teachers in this study expressed concerns about liability and losing their jobs should an accident occur. School boards impress on teachers the liability issues without considering how their decisions impact teachers and the programs they offer their students. Teachers in this study with less experience had less confidence in taking

students out of the school and were less likely to do field trips. As our current teachers reach retirement age, young people taking over these positions, as this inquiry indicates, are not willing to take the time and energy required to plan a field trip, including the paperwork. As well, administrators are less willing to risk the possibility of litigation should an accident occur. It is believed by the teachers in this study, young teaching professionals and teachers near retirement are not willing to risk losing their jobs due to a field trip accident, which is what they perceive will happen.

The serious tone of waivers requiring parent signature for low and moderate risk activities is seen as excessive and morally questionable (Coelho, 2001; Corbett, 1994). As the serious tone and length of the waivers has now increased, teachers and parents will likely become more hesitant to plan and organize a field trip for their students. Teacher morale is affected by the frustration and fears these policies imply.

Ultimately, how restrictive field trip policies impact teachers affects students. Restrictions on the types of activities teachers may involve students in affects programs. Transportation restrictions involve huge costs to the school and the students and require teacher time for fundraising to offset those expenses. Students will lose out on the educational benefits of significant learning experiences that develop knowledge and skills promoting life-long learning. As well, students will not have memories generated from school-based field trips organized by caring professional teachers.

The CBC television network aired a program on December 18, 2005, at noon MDT on *Country Canada*, about elementary students hunting musk ox in the Northwest Territories. It presented all of the organization necessary to undertake such a field trip, showed the hunt, the typical day at camp, and the skills the students were learning. The program ended with the teacher doubting the future of the field trip due to restrictions

being made to the types of activities done on the trip. The teacher felt that the longevity of this field trip was likely not very much longer. The students were thrilled to have learned so much, experienced real life, with all its cut, bruises, burns and hardships. The students said it was “so much better than school”.

Field trip policies are necessary for consistency and safety for students. Field trips are valuable educational experiences that cannot be duplicated in a classroom setting. Several solutions were offered by teachers to improve the negative impact of restrictive field trip policies.

- Allow use of 15-passenger school vans and private vehicles to transport students to sporting events and small group field trips.
- Avoid “knee-jerk” policy making based on one incidence and do not apply restrictive policy to an activity because of the poor planning or unavoidable circumstances of one field trip.
- Allow teachers to present their risk management strategies to better assess the actual risk of an activity based on the teacher’s experience, knowledge and preparation of students.
- Teachers need to know that their good intentions and hard work in organizing a field trip will not be held against them should an accident occur. Having assurance from the school board that their job is not in jeopardy if something should happen on a field trip is important.
- Having a checklist for teachers that they could fill out and know they had covered “all the bases” would be helpful for some educators.
- Having administrators review field trip policy at the beginning of the

school year to remind teachers of the guidelines was seen as a positive step to be taken.

- Compile one off-site form to fill out for an activity so only minor changes to the form would have to be made from year to year.
- Give teachers time to plan, to fill out the forms, do the paperwork, make the phone calls and arrangements so that field trips risk assessments can be minimal.

Field trips are an important part of a child's education. The policies governing field trips should encourage teachers to take the time and energy to plan them and carry them out. The waiver forms suggest that accidents are going to occur and that death is a possibility. Teachers are not interested in facing the consequences of an unfortunate event occurring. What can be done about this?

Waiver forms could be less emphasized by school boards and instead more effort should be put into training teachers on field trip planning and the benefits and components of a successful field trip (Centre for Sport and Law, 2005; Kitchen & Corbett, 1995; Carpenter, 1995). Waiver forms are not legally binding (Corbett, 1994) and are seen as a deterrent to doing field trips by some parents and teachers. The forms do not involve any risk management strategies that a successfully planned activity would have in place. The risk management strategies are the student preparations, the meetings with parents and the students, the carefully planned itinerary and meeting the safety guidelines provided by the school board.

### **5.3 Implications for Practice**

#### **5.3.1 Training to Conduct Field Trips**

Providing field trip training to teachers, especially those new to the profession would help these young professionals overcome their concerns. Encouraging experienced teachers to act as mentors for younger, less experienced teachers in field trip planning is another way to promote field trips. Training would help build organizational skills, provide teachers with experience in field trip planning and emphasize the educational benefits of field trips. Targeting teachers in training to conduct field trips is part of the solution. If the quality of a program is based on the initiative, experience and confidence of a teacher, which the literature and research results indicate, then provide the professional development needed to enhance programs for students.

The passion a teacher has for an activity is shared with his or her students. The teacher mentors the students to have the best experience possible, hopeful that the students will venture forward into similar experiences and activities in their adult lives. It's like planting a seed, nurturing it in its beginning stages, knowing you will not likely see the fruition, but always hopeful that what is being done will be worthwhile. The educators in this study have the greatest concerns about policy that restricts the choices a teacher can offer. The teachers in this inquiry with the most experience with field trips have the gravest concerns about the future of field trips for students in schools.

#### **5.3.2 Consider Risk Management Plans of Teachers**

Teachers in the study with a more extensive background in planning field trips are less enthusiastic about planning activities as school boards place more restrictions

on the types of activities and the destinations allowed by school boards. The likelihood of these teachers continuing to offer enhancement to their programs with field trips is reduced as more restrictions and requirements are placed on field trips. These teachers know how to plan a successful trip and have taken several over their teaching careers. Their own decisions and those of the school board to limit the field trip experiences of students sadden them. What can school boards do to address this? Allow teachers to discuss with them the perceived risk concerns of the board so that the teacher has an opportunity to show how these concerns have been addressed. Subsequently, better risk management might occur and satisfy the requirements for the safety of everyone taking the field trip. Good communication will be a key to solving this problem.

### 5.3.3 Support Physical Education Programs Requiring Field Trips

The program most affected by restrictive field trip policy is physical education. I believe that students cannot be motivated to be active for a lifetime if they think that activity can only take place in a school setting. For most people, attending school ends after grade 12 is completed. Experiencing activity in the community and the local area is important to know the possibilities for life following high school. Making healthy, active choices takes time to learn and requires practice in real life situations outside of the school setting. Field trip policy should not deter these choices from the education of students.

Do school boards want to promote the raising of a generation of non-risk takers? Should teachers, parents and students be fearful when they leave the school grounds during a school-sponsored field trip? How will these people respond to change if they have never taken any risks? What kind of citizens will be populating our communities

if they are sheltered from the rest of the world? Not only do I believe that the school boards in Alberta are supportive of real-life experiences for its students, I am confident that steps will be taken to address the many concerns raised in this document. If we want students to learn to be healthy citizens, physically, socially, intellectually, and emotionally, we should do more to support field trips as part of schooling.

#### **5.3.4 Board Policy Should Assure Teachers and Encourage Field Trips**

Participants in this study believe that field trip policy is necessary to provide the guidelines for the safety of all involved on a field trip. Going back to “the good old days” of loading up a vehicle with kids for a spontaneous trip across town is not where these teachers want to be. Proper planning and preparation, communication with administration and parents and teacher confidence and competence to undertake a field trip with any activities planned must be in place. The safety of everyone involved is the priority. However, these teachers feel that school boards are too quick to react in a negative manner to any accident that may occur, which negatively impacts students and teachers with restrictions. They indicate that if they are meeting risk management guidelines, know the risks and have prepared for them, school boards should not be so quick to say, “No!” It is demoralizing. Board reaction has frightened some teachers into not taking field trips. No teacher wants to face litigation but the perception remains that the risk of being sued must be avoided at all costs. The benefits and education acquired on a field trip are being overlooked. Field trips are in danger of being disallowed by school boards as a result and teachers do not want to see this happen. School boards must start making changes to their field trip policies, such as examining field trip proposals for risk management to determine approval, making reasonable transportation

requirements or financially supporting the policies for transportation, determining the cause of an accident, establishing guidelines to reduce the likelihood of a reoccurrence, allowing field trip activities to continue, and showing support for their teachers with training and professional development support to encourage teachers to further the education of their students.

#### **5.4 Summary**

Restrictive field trip policy has impacted teachers, professionally and personally. School board policy governing field trips has generated fear, frustration and apathy for teachers towards organizing field trips for students. The literature clearly demonstrates the benefits of field trips for educational purposes (Manner, 1995; Orion, 1993; Smith, 1995) and the need for field trip policy to ensure consistent, well-organized, educational experiences for students while on field trips (Canada Safety Council, 2002). The findings of this study support the literature. Policy regarding field trips is considered necessary by teachers to guide them through a process to plan a successful field trip.

As policy has become more restrictive, requiring more paperwork and the development of more restrictions regarding the activities and destinations of field trips, teachers in this study communicated feelings of frustration and defeat. They are “throwing up their hands” to surrender to school boards because it seems apparent that school boards do not want teachers in this study to take field trips. The number of bureaucratic obstacles has become a deterrent. School boards will face fewer instances of liability as fewer field trips are taken. If teachers are not planning for field trips to enhance the learning and experiences of their students, the benefits derived from these

opportunities will be lost.

The participants in this study believe field trips are important to the learning of students. Experiences beyond the classroom in the real world away from parents allow students to learn lessons that cannot take place in any other way. Teachers believe field trips should be the choice of the teacher so long as the safety guidelines, planning and risk management has been satisfactorily met. Teachers in this study do not want to put themselves or their students at risk. By identifying, measuring and controlling risks to meet the reasonable standard of care required by law, injury prevention is likely. Policy should not impede the preparations when the actual risks have been minimized by analysis and adequate participant preparations.

Field trips should be based on educational goals with links to curricular outcomes. Good planning and organization, communication with parents, clear student and supervisor expectations, an accepted itinerary and attention to the needs of the students will most likely ensure a successful field trip. Some of the best learning comes from the reflections students have following field trips, when they can share what was important to them and how the trip may have impacted their lives. Many educators are aware that field trips are what memories are made of for students and for teachers.

These teachers felt that some school boards seem to have lost sight of the importance of field trips for schools, programs and students. The restrictive policies regarding transportation of students, restrictions on destinations and types of activities, and use of waiver forms has made planning for a field trip an often exhausting ordeal for teachers. Fundraising to pay for buses, having adequate physical activity for students to fill an itinerary, and insistence on parental acceptance of waiver forms have detracted from the experience. It just may not be worth all the time and energy to meet

policy. Too much time is spent on paperwork, which could be better spent preparing students for a wonderful learning experience.

Students may not be receiving the kinds of educational experiences that last a lifetime, that involve real-life learning. The memories of school for students, that influence their views of schooling, of some teachers, of their willingness to do for others, are shaped by their educational experiences. As policies become more restrictive, teachers are less likely to take the time and energy to plan a field trip.

## **5.5 Further Research**

This study has explored the field trip experiences of a group of teachers in a particular school board setting. There is need for further research to explore teachers' field trip experiences and the impact of field trip policy in other jurisdictions and settings. Such findings will provide valuable information to field trip policymakers about general and specific issues experienced in the field and will raise awareness of the issues impacting teachers' field trip implementation.

Topics for further study could also include the impact on school administrators and board members of restrictive policies regarding field trips; the impact on students when field trips are limited or restricted; piloting and evaluating professional development opportunities for teachers to learn how to effectively plan a field trip, and; impact of field trip participation on school spirit and school/teacher morale.

## **5.6 Conclusion**

Field trips provide educational opportunities in real world settings. Teachers want to include field trips in their programs but field trip policies can impose unreasonable

expectations, restrict travel or the types of activities on field trips, and use of waiver forms. Teachers are exhausted from the paperwork and some have chosen not to include field trips for their students. The benefits students receive from their experiences away from school with their peers learning about the real world in a safe and planned situation are lost if teachers are discouraged from taking field trips.

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## Appendix A

### Participant Information Letter

Date

Dear \_\_\_\_\_.

I am writing to ask for your voluntary participation in a research study of the impact on teachers of recent policy changes regarding field trips. I am completing this study to fulfil a requirement for the degree Master's of Education in Leadership in Learning from the University of Prince Edward Island.

As a physical educator, I have chosen this research topic because of my personal interest in field trips and the various field trip policies that have come about as a result of the increased risk of litigation. The research results will add to knowledge about the effect policy formation has on decisions teachers make regarding field trip planning and whether teachers' field trip experiences meet the requirements of a risk benefit analysis. Knowing how teachers are impacted by restrictive policies may have significance for policy formation and teacher practice.

The criteria for selection of individual interviews is to be a teacher of elementary, junior high or senior high school in the PWSB with an interest in field trips. The focus group criterion for selection is to be a member of the Health and Physical Education Council executive. If you agree to take part in the study, you will be asked to participate in one of two activities: a focus group of ten or fewer members of the HPEC executive or two one-hour interviews, alone or by telephone. The focus group will take place following meetings at the Thinker's retreat of the HPEC executive in Kananaskis, Alberta. The individual interviews will take place in a mutually agreeable location to be arranged or at a mutually agreeable time by telephone. The times will be arranged at your convenience. The focus group interviews will take place September 17 – 19, 2004, and the individual interviews will be held during the period of October 1, 2004 – December 12, 2004.

Rather than very formal interviews, I am hoping to have more of a conversation with you. I have a number of pre-set questions to guide the interview process, but there will be opportunity for you to raise new topics and give more explanation on any subject that may come up. I will be asking questions about field trip experiences, both successful and those that you learned a lot about risk management from, the extent to which the field trip policy in your school district has restricted the type field trips planned or the success of your program, risk management practices developed, and the extent of student preparation for field trips. I will audiotape the focus group interview and individual interviews with your permission. After transcribing them word for word the hard copy transcript will be returned to you so that you may check what was said and make any changes, or clear up errors or oversights on my part. When I return the transcript of individual interviews to participants, I shall also arrange for a second interview to review it and to also ask new questions that have arisen from our earlier conversation. Once the interviews and transcriptions are complete, I will analyze the

data.

Your participation in this study is **voluntary**. You are free to refuse to participate, to withdraw at any time, or to refuse to answer certain questions, without giving a reason and without any adverse consequence. If you do choose to withdraw, I will ask that any information gathered up until that time be used for my final report. If you do not permit me to use the information, it will be destroyed immediately.

In order to protect your identity in the study I will be assigning a pseudonym to the tape of each participant. I will be the only person with access to the file matching the pseudonyms with the actual participants. While I **cannot guarantee** that people will not be able to recognize that you are referred to in the study, I will be making every effort to maintain the confidentiality of our interviews. I will use pseudonyms; I will choose private interview sites or conduct telephone interviews; and I will be sensitive to use of data as direct quotation or description, which may reveal the identity of the participants when it is combined with other data from all the interviews. In a focus group setting it is not possible to guarantee confidentiality either. I will remind participants at the beginning to share only to the extent that they feel they would disclose views and experiences in everyday encounters.

At the conclusion of the study, all audio tapes will be destroyed. Written records will be kept in a locked cabinet in my home for five years, after which time they will be destroyed. The results of the study will be presented to an examining committee of the Faculty of Education at the University of Prince Edward Island. The study will be published at a later time and will be available in the UPEI library. I will provide you with a brief summary of the findings upon request. I would be pleased to consider presenting the research at a meeting or workshop related to your work.

If you have any questions or concerns about the study, you may contact me at 780 351 2126, or by email at [carrieyanishewski@pwsb33.ab.ca](mailto:carrieyanishewski@pwsb33.ab.ca) or you can call my faculty advisor Dr. Kamini Jaipal at 902 566 0365. You may also contact the U.P.E.I. Research Ethics Board at 902 566 0637 or by email at [lmacphee@upei.ca](mailto:lmacphee@upei.ca) if you have any questions about the study.

Should you agree to participate in this study, please complete the attached consent form.

Sincerely,

(Signature of Researcher):

Carrie Yanishewski

**Consent Form****A Study of the Impact on Teachers of Recent Policy Changes Regarding Field Trips**

I have read and understood the material in the information letter. I understand my participation is completely voluntary. I have the freedom to withdraw at any time. I have the freedom not to answer any question. I understand that the information will be confidential within the limits of the law. I understand I can keep a copy of the signed and dated consent form. I understand that I can contact the UPEI Research Ethics Board at (902) 566-0637, or by e-mail at [Imacphee@upei.ca](mailto:Imacphee@upei.ca) if I have any concerns about the ethical conduct of this study.

\_\_\_\_\_ I agree to participate in the study.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Name (printed): \_\_\_\_\_

Contact Information:

\_\_\_\_\_ I would like a copy of this signed consent form for my records.

## Appendix B

### Interview Guide for Individual Interviews with Teachers

#### *Impact on teachers of recent policy changes regarding field trips*

##### Introduction

Thank you for agreeing to take part in this research.

*The purpose of this interview is to explore your perceptions of the impact on your program choices regarding field trips due to field trip policies of your school district. What we'll be doing is having a conversation about the kinds/types of risk management techniques used, teacher perceptions of field trip policies, risk benefit analysis, critical reflexion following the trip and the impact on your program choices regarding field trips. I am interested in collecting your thoughts, feelings, perceptions and knowledge of field trips and the policies that govern them. There is no right or wrong response. As I have outlined in the consent form, I will do everything I can to keep this interview content confidential.*

1. Tell me about your experiences with students, parents, administrators and other teachers on field trips.
2. What types of field trips have you been involved with? What risk management techniques were involved in planning the trip?
3. Over the past decade how have field trip policies in your district changed? How have these changes affected you professionally? Personally?
4. Do you feel restricted in any way in the type of activity or field trip you organize?
5. What are your perceptions of the policy makers? Why do you think these policies have been made?
6. How do these policies affect your program?
7. Have the field trip policies in your district restricted your choice of activity on a field trip? How does this make you feel? Do you think the policies are reasonable or unreasonable? How does this make you feel about field trips?
8. What have your reflections been regarding field trips once you have returned? What are your students' reflections?
9. When you analyze the risk versus benefit of a field trip, what risks are worth taking? Which ones are not? What do you perceive to be the benefits of taking field trips?

10. If you could change anything about field trip policy what would it be?
11. This covers the things I wanted to ask. Is there anything else you'd like to add?

## Appendix C

### Interview Protocol for Focus Group

#### *Impact on teachers of recent policy changes regarding field trips*

##### Introduction

Thank you for agreeing to take part in this research.

*The purpose of this interview is to explore your perceptions of the impact on your program choices regarding field trips due to field trip policies of your school district. What we'll be doing is having a conversation about the kinds/types of risk management techniques used, teacher perceptions of field trip policies, risk benefit analysis, critical reflexion following the trip and the impact on your program choices regarding field trips. I am interested in collecting your thoughts, feelings, perceptions and knowledge of field trips and the policies that govern them. There is no right or wrong response. As I have outlined in the consent form, I will do everything I can to keep this interview content confidential.*

1. Tell me about one memorable field trip you were involved in planning, organizing and supervising.
2. Why do you include field trips in your program? What purpose or curriculum outcomes do they accomplish?
3. Besides suggested safety guidelines what other risks need to be prepared for prior to taking a field trip? What risk management techniques are involved in planning a trip?
4. What have been your reflections of field trips upon return? What are the reflections of your students?
5. Over the past decade, how have the field trip policies in your district changed? How have these changes affected you professionally? Personally?
6. Do you feel restricted in any way in the type of activity or field trip you organize? Have you ever been denied permission to take a field trip? Why?
7. Why do you think these policies have been made? Have these policies affected your program choices or outcomes?
8. In your experience, do the benefits of field trips outweigh the risks, the time, energy and paperwork involved in organizing them?

9. If you could change anything about field trip policy in your district, what would you like to see changed? Why?
10. This covers the things I wanted to ask. Is there anything else you'd like to add?

**Appendix D**  
**Letter to School Board**

Date

Dear \_\_\_\_\_.

I am writing to ask for your permission to conduct a research study involving the teachers in your school district. I am completing this study to fulfil a requirement for the degree Master's of Education in Leadership in Learning from the University of Prince Edward Island.

My research study explores the impact on teachers of recent policy changes regarding field trips. As a physical educator, I have chosen this research topic because of my personal interest in field trips and the various field trip policies that have come about as a result of the increased risk of litigation. The research results will add to knowledge about the effect policy formation has on decisions teachers make regarding field trip planning and whether teachers' field trip experiences meet the requirements of a risk benefit analysis. Knowing how teachers are impacted by restrictive policies may have significance for policy formation and teacher practice.

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Teacher participation in this study is **voluntary**. Teachers are free to refuse to participate, to withdraw at any time, or to refuse to answer certain questions, without giving a reason and without any adverse consequence. If they do choose to withdraw, I will ask that any information gathered up until that time be used for my final report. If they do not permit me to use the information, it will be destroyed immediately.

In order to protect participant identity in the study I will be assigning a pseudonym to the tape of each participant. I will be the only person with access to the file matching the pseudonyms with the actual participants. While I **cannot guarantee** that people will not be able to recognize that you are referred to in the study, I will be making every effort to maintain the confidentiality of the interviews. I will use pseudonyms; I will choose private interview sites or conduct telephone interviews; and I will be sensitive to use of data as direct quotation or description, which may reveal the identity of the participants when it is combined with other data from all the interviews. In a focus group setting it is not possible to guarantee confidentiality either. I will remind participants at the beginning to share only to the extent that they feel they would disclose views and experiences in everyday encounters.

At the conclusion of the study, all audiotapes will be destroyed. Information collected in this study will be kept in a locked cabinet in my home for five years, after which time it will be destroyed. The results of the study will be presented to an examining committee of the Faculty of Education at the University of Prince Edward Island. The study will be published at a later time and will be available in the UPEI library. I will provide you with a brief summary of the findings upon request. I would be pleased to consider presenting the research at a meeting or workshop related to your work.

Teachers agreeing to participate in this study, will complete the attached consent form. If you have any questions or concerns about the study, you may contact me at 780 351 2126, or by email at [carrieyanishewski@pwsb33.ab.ca](mailto:carrieyanishewski@pwsb33.ab.ca) or you can call my faculty advisor Dr. Kamini Jaipal at 902 566 0365. You may also contact the U.P.E.I. Research Ethics Board at 902 566 0637 or by email at [lmacphee@upei.ca](mailto:lmacphee@upei.ca) if you have any questions about the study. I would appreciate a written response to this request at your earliest convenience.

Sincerely,

(Signature of Researcher):

Carrie Yanishewski

**PEACE WAPITI SCHOOL BOARD NO. 33****Policy HICA - Field Trips & Excursions****Adoption Date: November 28, 1996 Motion #357-96****Review Date: February 8, 2001 Motion # 20-01****Next Review: February 2004****Reviewer: Superintendents****Exhibits:****Cross Reference:****Legal Reference:****POLICY**

The Board believes that student travel away from the normal location of instruction contributes substantially to the achievement of the Board's educational goals.

In planning the proposed field trip, the Board expects the teacher to consider the educational value to be derived, community attitudes toward the proposed trip, and the safety and welfare of all students.

**PROCEDURE**

1. All requests for field trips shall be in writing and submitted to the principal.
2. Written approval will be provided by the Principal.
3. Parental consent forms, including the names of drivers of privately owned vehicles (if applicable), will be completed for field trips past a 80 km radius from the school or for field trips that extend outside the regular school day. One time blanket approval for scheduled sports events and unscheduled walking field trips in the neighborhood of the school will suffice.
4. Drivers must be 18 years of age or over and their vehicles must have liability insurance coverage of at least \$1,000,000 (one million dollars).
5. Exceptions to this policy due to special circumstances require the prior approval of the Superintendent of Schools.

**GUIDELINE**

1. The Board expects that:
  - a) field trips will arise out of the regular school program;
  - b) field trips be planned to minimize loss of regular instruction time;
  - c) all field trips receive prior written approval of the principal;
  - d) all field trips be conducted in accordance with school and Board regulations;
  - e) parents be informed of all field trips; and
  - f) Board policy and regulations pertaining to student conduct apply on international trips.
2. Supervision shall be provided as follows:
  - a) one teacher shall be appointed as the designated supervisor in charge of curricular trip.
  - b) sports trips should have a teacher as the designated supervisor, but a responsible adult approved by the principal could be appointed if teachers are unavailable.
  - c) one teacher for his/her class on day field trips within the community and a 1 to 15 ratio of supervisors to students on trips outside the community