



**Manhattan Beach Unified School District**  
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## **FIELD TRIP PROCEDURES**

MBUSD appreciates the contributions of parents and parent organizations to support the education of our students. In order to facilitate clear communication and smooth planning for field trips, we request that the following steps be followed:

1. Ensure that the field trip has been approved by an administrator. The site administration must approve all field trips. Overnight field trips, field trips to locations out of the country or out of state, or field trips where the amount payable to any single vendor will exceed \$25,000 must also be approved by the Board of Trustees. Field trip requests must be submitted at least one month in advance of the date of the field trip and before any funds are paid or committed. This is done through the completion of a Field Trip Request Form and, if necessary, an Overnight Field Trip Request Form.
2. Request quotations for transportation, admission tickets, and any other anticipated costs through the school site administrator or office manager. It should be possible to make arrangements for almost everything in advance and to pay for things through the OPR (Outside Purchase Requisition)/Purchase Order process. Once an initial quote is received, an OPR should be completed and sent to the Business Office, preferably at the same time as the Field Trip Request Form is submitted. Please include documentation of price quotes as well as deposit due dates, etc. This should be done as far in advance as possible and well before payment is due so that a Purchase Order can be prepared to expedite timely payment. If a vendor will not accept payment via purchase order, with prior approval payment may be made directly and a reimbursement request submitted to the Business Office. Reimbursement requests must be accompanied by itemized receipts and are to be submitted within 3-5 days of payment.
3. Once a field trip has been approved, finalize arrangements for all logistical details (fees, transportation, meals, substitutes, etc.) and send any updated quotes or invoices to the Business Office.
4. Hold an orientation meeting and distribute forms and paperwork as appropriate.
5. Send permission slips to parents of all participating students. If desired, a letter may be sent to parents requesting donations of funds to offset transportation fees, admission fees, and other costs associated with the trip. Checks should be payable to the Manhattan Beach Unified School District, with the school site, field trip, and student name listed on the memo line.
6. Document funds collected using a Donation Collection Form and submit funds to the Business Office. It is preferable to do this via hand delivery to ensure that deposits do not get lost. The Business Office will provide confirmation of receipt once funds have been deposited; information about NSF checks or other issues will also be provided as soon as it is available.
7. After the field trip, ensure that all invoices and reimbursement requests have been submitted to the Business Office.
8. Once all payments have been processed, the Business Office will provide a report listing funds deposited and payments made. If there are excess costs, the PTA will be invoiced. If there are excess funds, these will be held in the PTA account at the District Office and identified as a scholarship fund to be credited to future field trips (these credits will be applied before billing the PTA for future field trip expenses).

Thank you for your assistance in providing our students with a rich educational experience. Questions regarding this procedure may be directed to the Business Office. Please contact Linda Huber at x5944, and she will connect you with the person who is best able to answer your specific question.

### Timeline/Checklist

When	What	Who	Done
8 Weeks Prior to Trip	Begin gathering preliminary information (price quotes, etc.) to complete the Field Trip Approval Request Form	Field Trip Coordinator	
4-6 Weeks Prior to Trip	Submit Field Trip Approval Form	Site Administrator signs form and submits to Business Office	
4-6 Weeks Prior to Trip	If Field Trip is overnight or out of state/out of country, submit Overnight Field Trip Request Form	Site Administrator signs form and submits to Educational Services	
4-6 Weeks Prior to Trip	Submit OPR's w/ preliminary price quotes and/or reimbursement amount estimates to the Business Office (it is fine if these are approximate numbers; they will be used to generate PO's but can be adjusted later). Be sure to note deposit due dates.	Site Administrator co-signs form (along with PTA/Exec Dir Ed Svc/ budget authorization source) and submits to Business Office	
ASAP after request form is rec'd, if needed	Board approval requested for trips out of state, overnight, or over \$25,000 – this must be done <u>prior</u> to the commitment or payment of funds	Asst Supt for Administrative Services and/or Executive Director of Educational Services	
ASAP after submission of request form	District/Board approval granted	Asst Supt for Administrative Services and/or Exec Dir of Ed Services will notify Site Administrator	
ASAP after approval is granted	Hold orientation meeting and distribute and collect, as appropriate: <ul style="list-style-type: none"> <li>• Permission Slip for School Sponsored Activity</li> <li>• Donation request letter</li> <li>• Student Field Trip Code of Conduct</li> <li>• Chaperone Guidelines and Signature Form</li> <li>• Chaperone Volunteer Hold Harmless Form</li> <li>• Volunteer Driver Agreement</li> <li>• Statement of Insurance on Private Vehicles</li> <li>• Board Policy &amp; Administrative Regulation 6153</li> </ul>	Field Trip Coordinator	
As funds are received	Account for donations using Donation Collection Form and submit form and donations to the Business Office	Field Trip Coordinator/Site Administrator	
ASAP as info is received	Provide information of NSF checks or other issues with payments or deposits	Business Office to provide to Site Administrator	
2 weeks prior to Field Trip	Ensure that all logistical arrangements (transportation, admission, meals, lodging, forms, paperwork, etc.) have been finalized and that nothing further is needed.	Field Trip Coordinator	
2 weeks prior to Field Trip	Provide a preliminary statement of income and expense	Business Office to provide to Site Administrator	
1 week prior to Field Trip	Send any reminders needed to parents, chaperones, school staff	Field Trip Coordinator	
Day of Field Trip	Use Check-Off List to ensure that, before leaving campus, the group has: <ul style="list-style-type: none"> <li>• A permission slip for every student</li> <li>• Medical Emergency Instructions for each student</li> <li>• First aid kits, medications, other first aid needs</li> <li>• A list of chaperones, contact information, and completed forms for each (leave a copy of names and phone numbers with the school office)</li> <li>• Local emergency telephone numbers for destination location (hospital, police, fire, highway patrol, etc.)</li> </ul>	Field Trip Coordinator	
Within 3-5 Days of Payment	Submit any reimbursement request forms, along with itemized receipts	Field Trip Coordinator submits to Site Administrator for signature, and then to Business Office	
1-2 Weeks after Field Trip	Ensure that all final invoices have been submitted to the Business Office	Field Trip Coordinator	
3-6 weeks after Field Trip	Final statement of income and expense prepared, along with invoice for excess costs/credit slip for future field trip costs	Business Office to provide to Site Administrator	