

Department of Reporting and Regulatory Accountability  
MONTGOMERY COUNTY PUBLIC SCHOOLS  
Rockville, Maryland

March 12, 2008

MEMORANDUM

To: Board of Education Policy Committee

From: Christina Yuknis, Policy Evaluation Specialist

Subject: Executive Summary of the Evaluation of Policy IPD, *Travel Study Programs, Field Trips, and Student Organization Trips*

**Background**

At the request of the Board of Education Policy Committee, the Department of Reporting and Regulatory Accountability (DRRA) reviewed and evaluated the implementation of Board of Education Policy IPD, *Travel Study Programs, Field Trips, and Student Organization Trips*, to determine if the Board's desired outcomes have been achieved. In collaboration with the Office of School Performance (OSP), DRRA evaluated school-sponsored trips taken during the 2006–2007 school year for alignment with Policy IPD and its accompanying Montgomery County Public Schools Regulation IPD-RA, *Travel Study Programs, Field Trips, and Student Organization Trips*.

The processes identified in Policy IPD and Regulation IPD-RA are specifically designed to meet the desired outcome, “To have carefully designed travel study programs, field trips, and student organization trips that are directly related to the instructional program or provide extended enrichment opportunities related to a school-sponsored organization” (Policy IPD, Section D). The review determined that the desired outcome is being achieved.

**Methodology**

The data collection had three components—document analysis, survey, and focus groups. These items were used to triangulate the final results of this evaluation.

**Conclusions**

The majority of schools are providing financial options and not denying students participation based on their ability to pay; however, there are some minor inconsistencies in the implementation of this criterion that need to be addressed. The primary concern is that staff members need to provide financial options for all field trips, even though field trips cannot require student participation. This has been shared with the chief school performance officer.

Concerns about financial constraints recurred in each stage of this evaluation. The Policy Evaluation Advisory Committee expressed concerns about inequities in opportunities. Several members of the advisory committee shared that less affluent schools do not have the same opportunities to plan school-sponsored trips as more affluent schools. The survey respondents were troubled by the cost of transportation, as well as the inequities in opportunities for certain groups of students. Focus group participants shared similar concerns regarding the lack of financial resources for field trips and equity, similar to those of the survey respondents and the advisory committee.

The term “field trips” was confusing throughout the evaluation in that it is used and understood in one way by parents, teachers, and students, but defined differently in the regulation. Suggestions for improvement have been shared with the chief school performance officer.

### **Recommendations**

To promote more consistent and effective implementation of Policy IPD, MCPS could—

- Provide training for teachers who would like to plan school-sponsored trips that will address specific requirements in the policy and regulation.
- Conduct periodic reviews of approved and non-approved school-sponsored trips to ensure consistency of policy implementation.

### **Successful Practices**

The following successful practices that were identified as part of this evaluation will be shared with principals by OSP:

- Including a blank on the permission slips that allows parents to seek financial assistance. This prevents children from looking “different.” They can turn in a permission slip like their peers, and the teacher can discreetly work out the finances with the child’s parents.
- Stating on permission slips what the alternative educational activity will be for children not attending a field trip. Parents become informed consumers.
- Planning overnight trips early in the school year and informing parents well in advance. This allows parents to plan their schedules and finances.



**Policy Evaluation Report:**  
**Implementation of Board of Education Policy IPD,**  
*Travel Study Programs, Field Trips, and*  
*Student Organization Trips*

**Department of Reporting and Regulatory Accountability**

**March 2008**

**Christina Yuknis**



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This report details the evaluation methodology used, explains the results, provides examples of successful practices, and suggests opportunities for improvement.

## **Definitions**

The following definitions were derived from Policy IPD, Regulation IPD-RA, and conversations with OSP staff:

- *Carefully designed trips* include the following components:
  - They minimally disrupt the learning environment.
  - They are directly related to the instructional program or provide extended enrichment opportunities.
  - They have clearly identified objectives, which means that staff members explicitly state academic or enrichment outcomes (i.e.; curriculum-based) and set behavioral expectations for the trip.
  - They are cooperatively planned, which means that trips are developed by staff and students (if appropriate) and approved by the principal and/or the community superintendent.
- *School-Sponsored Trip*—Any activity that has a staff member assigned as an agent of the school and has been approved by the principal and/or the community superintendent. Money is collected and managed by the school for these trips.
  - *Field Trip*—A school-sponsored activity that is directly related to the instructional program. A field trip may be an overnight trip. This includes any trip related to a class.

- *Student Organization Trip*—An activity that provides extended opportunities related to an officially recognized school organization. Participation is usually limited to members of the organization or club. Student organization trips should be scheduled for nonschool days. This includes any trip related to a club and is not related to class requirements.
- *Travel-Study Trip*—An activity that combines instruction and travel for an extended period of time on this continent or abroad. Some programs include a specific course of study to be completed, while others place emphasis on exposure to foreign cultures. Participating students may be from different grade levels or classes. Travel-study trips should be scheduled for nonschool days.
- *Other trips*—These are out-of-school experiences that are not considered to be part of the above categories. They were not included in this evaluation.
  - Community-based instruction
  - Outdoor education
  - Student government general assembly meetings
  - Teams traveling to compete in athletic events
  - Foreign exchange programs
  - Study abroad programs

### **Minimum Criteria for Success**

The criteria used to determine success were identified using the position statements set forth in the policy. To be successful, the criteria needed to be applied consistently systemwide. Below are the criteria for a successful implementation of Policy IPD.

- Student grades are not adversely affected based on their participation in a school-sponsored trip.
- Students may elect not to attend trips.
- Schools provide financial options to allow maximum student participation.
- Students are not denied participation due to financial reasons. (This does not apply to student organization trips or travel study trips that are not integral to the instructional program.)
- Trips are carefully designed.
- Trips not directly related to the instructional program (i.e., end-of-year trips) are permitted only with the community superintendent's approval.
- Community superintendents review the policy and regulation at least once annually.
- A regulation was created to implement the policy and contains procedures for a trip being cancelled by the superintendent for safety or security reasons.

## Methodology

Prior to the evaluation process, DRRA staff met with OSP staff to review the policy, clarify concepts, and determine the data necessary for the evaluation. A Policy Evaluation Advisory Committee was established, and a meeting was held. The advisory committee consists of members from various stakeholder groups. Present at the meeting to discuss Policy IPD were parents, students, and school-based staff. Members of the committee shared their experiences concerning school-sponsored trips and provided feedback on their perceptions of the policy. Using this information, DRRA staff determined the sample and data collection methods.

### *Data Collection*

Three different sources of data were collected and analyzed. These were used to triangulate the final results of this evaluation.

- Document analysis was conducted for the following items:
  - Related policies and regulations (listed in Appendix A)
  - Associated MCPS forms (listed in Appendix A)
  - *Principals Handbook 2007–2008*, Section I
  - Trip-planning packets housed in OSP
- *Survey* of school staff involved in the trip planning processes. This was developed in collaboration with the Department of Shared Accountability.
- *Focus groups* were conducted with school-based staff involved in the planning process.

### *Sample Selection Procedures*

Three sampling procedures were used in the course of this evaluation—a random selection of schools had their trip packets analyzed (document analysis), criterion sampling was used to determine the participants for the survey, and volunteer sampling was used to identify the schools that participated in the focus groups.

### *Document Analysis*

The document analysis included a review of policies, regulations, and forms associated with Policy IPD. Every effort was made to review all of these items; sampling was unnecessary. The review of the trip packets was not completed for each school and, therefore, required the use of sampling.

Since the data collected from the packets were qualitative, sample size was relatively subjective. A sample of 31 schools was considered satisfactory for this evaluation. The schools chosen for this analysis included 4 high schools, 6 middle schools, 20 elementary schools, and 1 special school. These schools represent different geographic areas of the county.

A trip must be approved by a community superintendent or OSP for any of five reasons—the trip is more than 50 miles away from the school, the trip occurs in June, the trip is overnight, the trip is to a pool or a theme park, or the trip is for a reward or a celebration. These are the packets that must be turned in to OSP and, therefore, constitute a majority of the packets reviewed for the

document analysis. Some schools complete a field trip packet for trips that do not meet any of these requirements, and a few of those packets were reviewed as well.

OSP maintains a database containing trips that are reported from schools, but it is important to note that this database does not contain every trip taken by every school. All trips that must have OSP approval are listed in this database, along with any additional trips that schools choose to report. The database had a total of 1,431 trips listed, with 522 of those trips meeting one or more of the criteria for OSP approval. There were 243 trips that fell under two or more categories, which is about 47 percent of the trips requiring approval.

The schools chosen for the sample accounted for 324 of the total number of trips in the database. Of the 324 trips, 107 trips required OSP approval, which is approximately one-third of the total number of trips for the sample group. Documents for 88 of the 107 trips (see Table 1) were reviewed, and 78 required OSP approval for at least one reason. Seventy-eight of the packets were for field trips, seven were for school sponsored trips, and three were for travel study trips.

Table 1

*Trip Packets Reviewed*

	N Packets	% <sup>a</sup> Packets
Total trip packets reviewed	88	100
Trip required OSP approval	78	89
Trip was more than 50 miles from the school	53	60
Trip occurred in June	24	27
Trip was overnight	26	30
Trip was to a pool or theme park	18	20
Trip was for reward or promotional purposes	14	16

<sup>a</sup> The sum of the percentages can be greater than 100, because trips may require approval for more than one reason.

*Survey*

A survey was sent to teachers involved in planning school-sponsored trips. While the survey was directed at teachers, other school staff members responded and those responses were kept in the final analysis. The survey had 377 teachers and staff members respond.

Validity of the Sample—The respondents were distributed among elementary, middle, and high schools throughout the Montgomery County Public Schools (MCPS). Of the respondents responding to the survey, 57 percent were in elementary schools, 30 percent were in middle schools, and 13 percent were in high schools. The respondents were spread throughout the county. Each quad-cluster had between 52 and 72 respondents, which represented between 14 percent and 19 percent of the sample.

Sample Demographics—The survey respondents reported planning a total of 1,335<sup>1</sup> trips. Of the 377 respondents, 316 planned trips last year. Of the respondents who planned trips, the number planned per respondent ranged from 1 to 38 trips, with an average of 4 trips per person and a median of 3 trips.

### *Focus Groups*

Seven schools held focus groups—three elementary schools, one middle school, two high schools, and one special school. Efforts were made to include schools from geographically diverse areas; however, we were unable to obtain schools from rural areas of Montgomery County. An attempt also was made to gain a variety of perspectives regarding field trips. Two special programs participated in the focus groups—a magnet program and a special education school. In addition, within every school, any staff members that were involved in any part of the school-sponsored trip planning process, including teachers, administrators, business managers, and secretaries, were invited to participate.

Focus groups consisted of structured, open-ended questions and an open forum for anything the group wished to share regarding the policy. Groups lasted for approximately 45 minutes.

## **Results**

In this section, the results of the data collection are presented. Each of the criteria for success is listed, and the supporting data are described. Other relevant findings also are included in each section.

### *Respondents' Overall Perception of Field Trips*

Focus group participants and 98 percent of survey respondents agreed that field trips support the instructional program in their buildings. One respondent summed up the major themes of the responses:

Properly planned and executed, field trips are invaluable assets to curriculum for all students. They teach students to think on their feet, to observe, and to take advantage of the cultural heritage of the arts institutions, archives, and collections available to them (especially here in our greater Washington Metropolitan Area). Also, they teach students' responsibility to a larger group, and the joy of shared experience. Field trips should “add to,” not exist “instead of” classroom instruction, and they should never be experiences where they can be described as a waste of valuable instructional time. Time is too short already!

In addition to supporting field trips as “invaluable assets to curriculum,” respondents expressed concerns about students missing out on opportunities due to the focus on testing. This respondent's comment sums up those concerns:

Our students don't have the opportunities that I had when I was an MCPS student. I remember going to the Kennedy Center, and other places around DC, just for the enrichment of being so close to the nation's capital. It has a major effect on

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<sup>1</sup> One outlier, a response of 90, was eliminated from this section.

whether or not a student has the necessary background knowledge to get an edge in our competitive society. I understand that we are now a test-driven school system ... but our kids are really missing out.

Like the survey respondents, focus group participants expressed the importance of field trips in their instructional programs. It is a tremendous amount of work to plan trips, and as one administrator noted, one day of a field trip takes much more planning than a day of instruction. Despite all the work, participants agreed that the experiences that the students gain are worth it. The students use these experiences throughout the year and make connections to other instructional topics. To illustrate this point, participants in two focus groups shared that their fifth graders write memoirs of their elementary experiences, and the students always write about their field trips, which made lasting impressions.

*Student grades are not adversely affected based on their participation in a school-sponsored trip*  
Student participation in field trips does not impact students' grades, according to 90 percent of the survey respondents. Some focus group participants explained that field trips extend class teaching, and the assessment process is more informal. This may be attributed to the fact that field trips cannot be mandatory. Only two packets reviewed in the document analysis addressed grades, and they indicated that student grades would not be adversely affected due to students' participation in a school-sponsored trip.

Focus group discussions supported the finding that grades are not adversely affected by participants in field trips. Trips are curriculum-focused, and the trips reinforce concepts taught in class. Therefore, students are able to participate in preparation and follow-up activities even if they do not participate in the field trip. For example, the magnet program participants shared their assessment for an annual trip to a large city. There are actually several assessments, because the trip is interdisciplinary and they are bound into a book for the students. This is a formal assessment for the students, and part of it can be completed by students who do not participate in the trip. There are sections that can only be completed by students on the trip, and alternative assignments are provided for students who did not attend.

Follow-up activities can be modified for students who do not participate to incorporate experiences they have had or using the website of the location to learn the material. Other ideas for including students not participating in field trips were to bring back materials from the trip, use pre-made materials from the trip sites, have students re-enact what they did, visit the site or a similar site on their own, and have discussions around what happened on the trip.

Survey results provided another source of information regarding the impact of field trip participation on student grades. The survey responses indicate that 93 percent of respondents feel that students do have the opportunity to make up missed work. Some of the qualitative responses explained the 7 percent of respondents who disagreed may include the fact that when students attend a field trip they do not miss class work and, therefore, do not need to make it up (primarily elementary schools) or that their peers did not support the trips and withheld work from students who attended a trip.

### *Students may elect not to attend trips*

The document analysis showed that 64 trips addressed this criterion. Each of those 64 packets indicated that students could opt out of the trip. Several schools included a line on their permission form that allowed parents to deny permission to participate in a school-sponsored trip. Several trip packets that were examined indicated that all students in a class would be attending and that alternative assignments would be unnecessary.

Participants from most focus groups reported that it is rare for a child not to attend a field trip. Every focus group said that they provide alternative activities and expect instruction to continue when students do not participate in a field trip. Participants in one elementary school focus group remarked that students who do not participate in a trip often do not come to school that day. If they do, these students typically stay back with a teacher. They are provided instruction or work related to the trip, but lengths are taken to ensure students do not feel like they are being punished. Students are given instruction that is more fun, or they become a class helper.

The magnet program focus group participants reported that students who do not attend field trips are expected to learn the same material. Participants agreed that it is not fair to exclude students from learning the material; access must be provided in a different way. Their philosophy is that everything can be taught in a classroom, but the field trip makes the information brighter and more authentic for the students.

Seventy-nine percent of the survey respondents agreed that students are provided alternative activities if they do not participate in a field trip. Some respondents commented that this question was not applicable to their situations. For example, in elementary schools, generally every child attends a field trip, and there is no need for an alternative activity to be provided.

This finding prompted a little more investigation about whether patterns emerged in how people responded to this question. A test of statistical significance was chosen to determine if respondents at each school level (elementary, middle, and high) answered the question (of whether or not alternative activities are provided) in a predictable manner.<sup>2</sup> The test indicated that there is a statistically significant pattern to these responses<sup>3</sup>. Respondents in elementary schools were more likely to disagree or strongly disagree than respondents in secondary schools. In fact, when elementary schools were removed, the agreement rate for respondents rose from 79 percent to 86 percent.

### *Schools provide financial options to allow maximum student participation*

The survey asked respondents what financial options were provided to students who could not afford to pay for trips. Ninety-five percent of respondents reported that their schools found ways to include students, regardless of their ability to pay. This supports the results of the document analysis, where 96 percent of trips planned by schools provided financial options.

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<sup>2</sup> A Chi-square test was used to determine the statistical significance ( $p < .05$ ).

<sup>3</sup>  $p = .02$

Schools use a variety of methods to locate funds in order to bring their students on field trips. The most common sources are school funds and parent sources (71 percent), parent teacher association (PTA, 57 percent), and parent donations (43 percent). Table 2 provides a list of the financial sources identified by respondents.

The survey results indicated that the schools not providing financial options were spread geographically in the county. The document analysis indicated that 29 of the 31 sample schools provided financial options for every trip. The remaining two schools provided financial options for most trips.

Table 2

*Financial Options for Students who Cannot Afford to Pay*

Source	N Respondents	% Respondents
School Funds	268	71.1
PTA	216	57.3
Parent Donations	162	43.0
Team Money	88	23.3
Fundraisers	72	19.1
Staff Donations <sup>a</sup>	20	5.3
Students are Denied Participation	19	5.0
Grant Money from External Organizations <sup>a</sup>	8	2.1
Extra Fee Included in Cost of Trip <sup>a</sup>	8	2.1
Other Donation Sources <sup>a</sup>	3	0.8

Note. The sum of the percentages can be greater than 100, because respondents identified all financial options that were available for students.

<sup>a</sup> These financial options were written in; therefore, may not be representative of all respondents.

*Students are not denied participation due to financial reasons*

Seventy-five of the 78 field trip packets (96 percent) indicated that students were not denied participation due to financial reasons. Three hundred fifty-eight of the survey respondents (95 percent) also indicated that students are not denied participation based on their ability to pay.

The focus group participants slightly contradicted this trend, because the participants in each group reported that every student is given the opportunity to attend a field trip regardless of his or her ability to pay. Focus group participants reported that while they do not deny participation on a trip, they do encourage parents to pay a portion of the cost, even if it is a nickel.

There were three trip packets that indicated that students were not provided the opportunity to participate in a trip due to financial reasons. Those packets included explanations that since the trips were voluntary, funds were not available to support students who could not afford to pay. That explanation is not in keeping with the requirements of the policy.

Schools receive money to support field trips from a number of sources—PTA, grants, building a subsidy into the overall cost of the trip, fundraising, using leftover money from previous trips that was not refunded to parents<sup>4</sup>, parent donations, and other donation sources. Participants in one focus group commented that their greatest challenge is that parents do not always inform the school when they have difficulty paying for a field trip.

The financial requirement does not apply to student organization trips or travel-study trips. It is important to note, however, that schools sponsoring student organization trips or travel-study trips attempt to include all students, even those with financial difficulties. Focus group participants and document analysis indicated that this is done primarily through fundraising efforts.

*Trips not directly related to the instructional program (i.e., end-of-year trips) are permitted only with the community superintendent's approval*

The review of the *Principals Handbook 2007–2008* and the interview with OSP staff revealed that all field trips not directly related to curriculum must be approved by a community superintendent. Additionally, all field trips occurring in June require the approval of the community superintendents. The review of the trip planning packets revealed that this requirement is being implemented. Of the 88 packets reviewed, 35 had objectives not directly aligned with curriculum. Each of these packets had been approved by a community superintendent, and every packet in the sample that was expected to have received approval for this purpose was accounted for in this analysis. The trips not directly related to the instructional program were typically taken at the end of the school year to pools or amusement parks.

*Community superintendents review the policy and regulations at least once annually*

The review of the *Principals Handbook 2007–2008* and the interview with OSP staff revealed that community superintendents reviewed the policy and regulation with principals in August 2007. The OSP staff indicated that Policy IPD and Regulation IPD-RA are reviewed more frequently than once a year.

*Trips are carefully designed*

Carefully designed trips, as noted in the definition section, include several components. The discussion in this section will address each component separately. Survey respondents and focus group participants consistently reinforced two ideas. These trips are valuable to the instructional program, however, it takes a tremendous amount of time and energy to plan trips for students.

The document analysis and the focus groups provided examples of how school staff ensured carefully designed trips while at the same time minimizing teachers' time in planning the trips. Some schools have formal field trip planning forms and checklists to help make the process more efficient. Survey respondents and focus group participants expressed a desire to have a similar idea that is more consistent at the county level.

There are several factors which aided or hindered teachers' planning of carefully designed trips that need to be shared. A question included on the survey asked about some factors and allowed for additional ones to be written in. Figure 1 shows the factors teachers indicated as either

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<sup>4</sup> Either parents refused a refund, or the amount was too small to refund and was moved to a general account.

facilitating or impeding the field trip planning process. The factors shown are only the ones included in the survey, not specific answers which were written in by teachers.

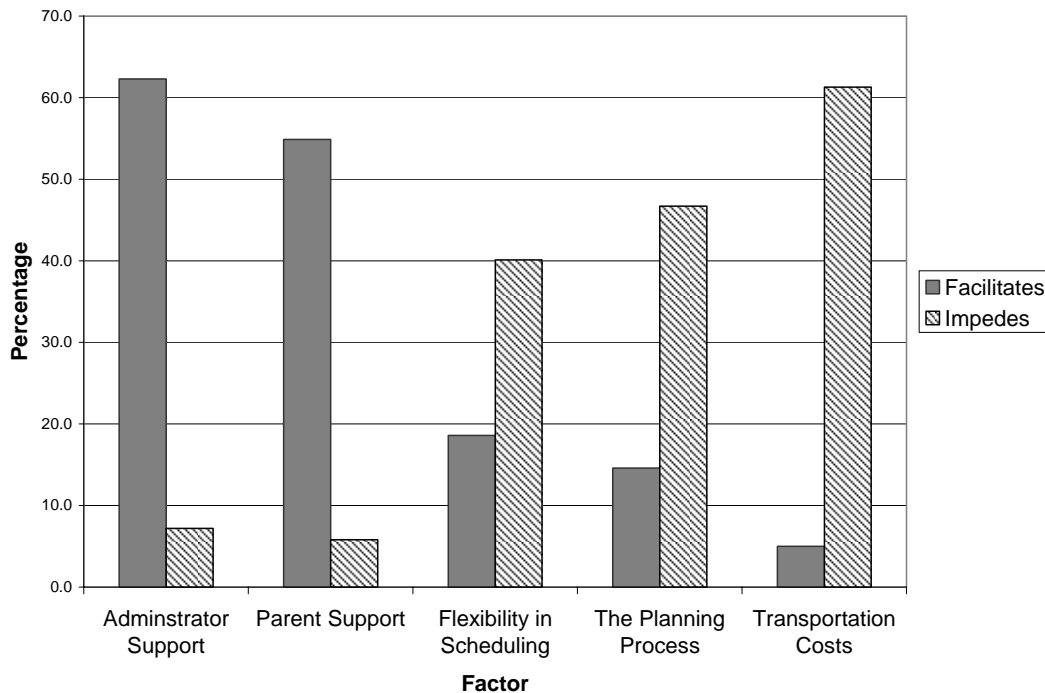


Figure 1. *Factors in Planning Field Trips*

Approximately two-thirds of the survey respondents reported that administrators were helpful in the planning process. A few respondents wrote that administrators are not involved in the process except to approve trips. Also, parents and support staff were considered to facilitate planning trips more often than they impeded the process. One respondent explained:

The school’s administrators and support staff have been very helpful in planning and carrying out trips. The parent community has been supportive and enthusiastic as well. Trips implemented at my school tend to be well planned and executed.

Several respondents also noted that revisiting trip sites or bringing the sites to the school (referred to as “in-school field trips”) facilitated the planning process. Revisiting sites from year-to-year allowed for respondents to modify existing materials instead of creating them from scratch. “In-school field trips” result in less paperwork and lower costs for the students.

The cost of taking a field trip was the greatest impediment to planning trips, garnering 62 percent of the respondents, especially for schools with a high percentage of students receiving Free and Reduced-price Meals System (FARMS) support and Title I funding. Two respondents explain below:

Cost is a huge factor in our community. Because of our high FARMS rate and the large number of students who are close to the FARMS line, we often have to subsidize far more than we can afford.

Total cost of field trips—Title I schools cannot afford certain field trips. This creates inequity between students and schools.

This led to a question about whether respondents would respond to the question in ways based on their geographic location. A test of statistical significance was used<sup>5</sup>, and it shows that there is a statistically significant relationship between a respondent's geographic location (defined by quad-cluster) and his or her view about transportation costs<sup>6</sup>. For example, respondents in the quad-cluster with Clarksburg, Damascus, Gaithersburg, Col. Zadok Magruder, and Watkins Mill high schools were significantly more likely to identify transportation costs as impeding the trip planning process. Respondents in the Bethesda-Chevy Chase, Wheaton, Walter Johnson, and Walt Whitman quad-cluster were significantly less likely to identify transportation costs as impeding the trip planning process.

Another factor, which was written in by several people and discussed in focus groups, was frustration that MCPS buses, which are less expensive than private carriers, have limited availability. Although respondents and participants recognize that this is because the buses have specific routes and specific times in which to operate, it was frustrating for them. It also impacted their ability to plan affordable, educational trips for students:

School buses could be used only between 9:30 am and 1 pm so it impedes some field trip opportunities: either we cannot take the field trip or we need to hire a private bus company which makes the cost prohibitive.

When taking the county buses we have to always be back by 1:30 and usually we leave at 9:30. Since we have to be back by 1:30 we have to leave [the field trip site] at 12:30. We normally get to a location by 10 or 10:30. If we eat lunch at the location at noon, then we have only had an hour and a half for the actual field trip. This limits the exposure and ability of students to maximize their opportunity for learning.

Another frustration repeated in the written comments was with the process of getting field trips approved (the “red tape” as one respondent called it). Respondents expressed concerns that the paperwork is cumbersome, redundant, and confusing.

The amount of time it takes to write up a formal field trip request is unreasonable. It sucks up a lot of my planning time.

There is far too much paperwork to complete for field trips. Due to the time involved, we are cutting back on our trips. In the end, the kids will lose by not having these exciting learning opportunities.

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<sup>5</sup> A Chi-square test was used ( $p < .05$ ).

<sup>6</sup>  $p < .001$

Finally, several teachers mentioned that many of their peers teach mixed grade-level classes, and this makes the planning process more challenging. In addition, teachers noted that field trips involving more than one grade level or that impact multiple grade level classes are more disruptive to the learning environment.

*Trips minimally disrupt the learning environment*—The survey data indicate that 78 percent of respondents agree that field trips are minimally disruptive to the school day. However, there are factors that make some field trips more disruptive than others as these respondents shared:

We collaborate not only on grade level but between grade levels - e.g. Math 7, IM [Investigations into Mathematics], Algebra. Therefore, if one grade level goes on a trip, it interrupts all other classes for that course. In our collaboration, we all teach the same and assess the same on the same day. Therefore interruptions to the school day affect all teachers of that course regardless of grade level.

Some trips are more disruptive to instruction than others. For instance a trip that involves an entire grade is the least disruptive. A trip that involves large numbers over all 3 grades is more disruptive since if you have 8–10 kids missing from a class you do not want to plan a lesson with direct instruction that will have to be repeated the next day.

Focus groups were asked how they minimize disruption to the school environment when planning field trips. The overwhelming answer was to plan ahead and communicate. Other strategies that facilitate this aspect of planning include consideration of the master calendar, curriculum needs, and class schedules. Teams collaborate with specialists and other impacted teachers. To minimize the amount of classwork that is missed, schools will adjust their schedules (such as teaching mathematics later in the day) or change the times of the trip to accommodate class needs. Mathematics was the class that was most frequently mentioned as needing to be accommodated.

In secondary schools, focus group participants indicated that field trips do not have a huge impact on the learning environment. Classes and instruction continue on a regular schedule, and students follow their regular schedules. Generally, teachers on a trip will leave plans and materials for their classes, which are usually covered by a substitute or a colleague. This is always arranged in advance.

The participants in the focus group at the special school expressed their concerns with field trips, especially at the high school level. Their students arrive with academic deficits, due to the nature of their disabilities. As such, they are committed to providing a strong instructional program to help their students catch up and succeed, especially with the high stakes assessments. The students cannot afford to miss instruction; however, these same students are lacking critical social skills that allow them to function in society. Teachers have taken students to sit-down restaurants, where students had no idea how to interact with servers and leave tips. Participants stated that field trips are valuable for these students, but pressures to pass the high stakes assessments are strong.

*Trips are directly related to the instructional program or provide extended enrichment opportunities*—The survey asked respondents to indicate the purposes for which field trips were planned last year. The results are indicated in Table 3.

Table 3

*Purpose for Planning Field Trips*

Purpose	N Respondents	% Respondents
Integral to the Instructional Program	289	71.4
Support the Instructional Program	263	69.8
Celebrate the End of the Year	82	21.8
Celebrate Promotion	69	18.3
Reward and Motivate Students	36	9.5
Enhance Curriculum <sup>a,b</sup>	34	9.0
Provide Direct Experience <sup>a,c</sup>	19	5.0

Note. The sum of the percentages can be greater than 100 because respondents identified all the reasons for planning trips.

<sup>a</sup> These items were written in by respondents; therefore, the data may not be representative of all respondents.

<sup>b</sup> This category includes items such as exposure to ideas, extending curriculum, providing background knowledge, community outreach, and visiting programs (colleges, vocational, etc.).

<sup>c</sup> This category includes hands-on learning, learning social skills, life skills, and providing “real world” experiences.

The majority of survey respondents indicated that field trips are integral to and support the instructional program. Less than one quarter of respondents planned field trips to celebrate promotion to the next level or the end of the year. As one respondent shared:

Field trips should be used as a teaching and enrichment tool to further the instructional program. Field trips as rewards for student behavior or completing a grade level are not necessary and are not a part of this school's philosophy.

Document analysis resulted in similar findings. Of the trip packets reviewed, 85 percent were directly related to the instructional program. The remaining 15 percent were to celebrate the end of the year at an amusement park or a pool and represents trips that are required to receive community superintendent approval. The percentage stated here is most likely inflated because not all school-sponsored trips require approval from the community superintendent.

*Trips have clearly identified objectives*—The survey asked respondents about the alignment of preparation and follow-up activities with curriculum objectives. The results indicate that 96 percent of respondents agree that preparation activities and follow-up activities are aligned. Findings of the document analysis support similar findings, indicating that 96 percent of trips directly related to the instructional program had clearly identified objectives. Some trip packets even included the specific indicators that would be met.

Focus group participants were asked how objectives for field trips are determined. The resounding response was that teachers base trips and objectives on curriculum. Most focus group participants indicated that they especially focus on providing students with experiences that cannot be provided in a classroom.

Participants also noted that field trips have secondary considerations. Examples of these considerations are—less obvious connections to the curriculum (such as aesthetics), exposure to real-life experiences, “schema building” activities, opportunities to demonstrate social skills and leadership, and how much fun students will have on a field trip. Participants in the special school focus group also consider the social and emotional skills students can apply while on a trip.

Travel study trips and student organization trips usually support the curriculum in some of those less obvious ways. For example, Spanish classes may take a trip to Spain where the students are immersed in the language. The added benefits include experiencing different cultures and customs and trying new foods. Drama Club students may watch a production, write a review of that performance, and have that review published in *The Washington Post*—an activity directly tied to the English curriculum.

Participants shared ways that they glean the maximum educational value possible out of trips. For example, a trip to a music festival in Rome provides students with the opportunity to practice their performance skills while also taking advantage of the cultural offerings of the city.

*Trips are cooperatively planned*—To address this criterion, focus groups were asked how many people are involved in planning trips and their roles in the process. Every school indicated that teams of teachers usually work together to plan trips. They use a number of strategies, including having one person as the central field trip coordinator who delegates tasks or having each person on the team take primary responsibility for one trip. However, there are exceptions. If the trip involves only a few students or classes, one teacher may take complete responsibility for planning the trip.

Focus group participants noted the involvement of the administrative secretary, the business manager, the financial assistant, the school nurse, the cafeteria manager, and building services in the process. The administrative secretary assists with paperwork and finances in elementary schools, the business manager and the financial assistant handle the finances in secondary schools, the nurse prepares medications to be administered, the cafeteria manager makes lunches for students and adjusts meal preparations accordingly, and building services staff cleans classrooms when students eat in them.

At times, parents are involved with planning trips. One high school noted that they sometimes have parent committees that take on certain aspects of planning a trip. One elementary school also mentioned an upcoming field trip being planned in conjunction with a parent. Parents also frequently chaperone field trips, although in certain instances, parent chaperones are discouraged or not permitted. The most common reason for this is a concern for liability issues. If something happens, MCPS staff can be held responsible and given consequences. Parents, on the other hand, cannot. Often parents are focused on their own children and may not be attentive to the rest of their chaperone group, and this is a concern for trip planners.

While the survey and the document analysis did not directly provide information regarding the cooperative nature of school-sponsored trip planning, these data sources do provide insight into the people who are involved with planning. As with the focus groups, the people involved in planning trips include administrators, paraeducators, administrative secretaries, counselors, media specialists, business managers, financial secretaries, parents, students, and community organizations.

*A regulation was created to implement the policy and contains procedures for when a trip is cancelled by the superintendent for safety or security reasons*

Regulation IPD-RA was created to support Policy IPD, and it was most recently revised in October 2004. Section III.A addresses the procedures for cancelling a school-sponsored trip. Cancelling trips for safety reasons and weather events are included as well. The regulation addressed each criterion covered in this evaluation except two. The two requirements not addressed were that the community superintendent will review the policy at least once annually and that the community superintendent must approve all trips commemorating promotion and trips used to motivate or reward students. However, these criteria have been addressed in the *Principals Handbook 2007–2008*, as noted above. Table 4 shows the criteria for success and the section of the regulation which addresses it.

Table 4

*Criteria Addressed in Regulation IPD-RA*

Criterion	Location in Regulation
Student grades are not adversely affected based on their participation in a school-sponsored trip.	III.C.3
Students may elect not to attend trips.	III.C.4
Schools provide financial options to allow maximum student participation.	III.C.5
Students are not denied participation due to financial reasons. <sup>a</sup>	III.C.5
Trips are carefully designed.	III.C.1–2, 6–10 III.E.2 III.D.1 III.F III.G.3.c

*Note.* This information is based on the regulation that was revised in October 2004.

<sup>a</sup> This is not applicable for student organization trips or travel study trips.

*Support of other policies*

An additional piece requested in the Policy IPD purpose statement was that trips should support other Board policies. Although this was not a criterion required to successfully implement

Policy IPD, it was an item that was considered in this evaluation. Other Board policies supported by Policy IPD and Regulation IPD-RA are as follows:

- Policy BBB, *Ethics*  
Regulation IPD-RA devotes Section III.B to clarifying how to avoid a conflict of interest. Although Regulation GCA-RA, *Employee Conflict of Interest*, is specifically mentioned, Policy BBB also contains language regarding conflict of interest.
- Policy JFA, *Student Rights and Responsibilities*  
Several schools indicated on their permission slips that the *Student Rights and Responsibilities Handbook* was still in effect while they were on school-sponsored trips.
- Policy JNA, *Curricular Expenses for Students*  
Policy JNA and Policy IPD both encourage schools to provide field trips that are related to the instructional program and prohibit the denial of students' participation based on the inability to pay the fee.

## Conclusions

The majority of schools are providing financial options and not denying students participation based on their ability to pay, however there are some minor inconsistencies in the implementation of this criterion that need to be addressed. The primary concern is that staff members need to provide financial options for all field trips, even though field trips cannot require student participation. This has been shared with the chief school performance officer.

Concerns about financial constraints recurred in each stage of this evaluation. The Policy Evaluation Advisory Committee expressed concerns about inequities in opportunities. Several members of the advisory committee shared that less affluent schools do not have the same opportunities to plan school-sponsored trips as more affluent schools. The survey respondents were troubled by the cost of transportation, as well as the inequities in opportunities for certain groups of students. Focus group participants shared similar concerns regarding the lack of financial resources for field trips and equity, similar to those of the survey respondents and the advisory committee.

The term "field trips" was confusing throughout the evaluation in that it is used and understood in one way by parents, teachers, and students, but defined differently in the regulation. Suggestions for improvement have been shared with the chief school performance officer.

## Recommendations

To promote more consistent and effective implementation of Policy IPD, MCPS could—

- Provide training for teachers who would like to plan school-sponsored trips that will address specific requirements in the policy and regulation.
- Conduct periodic reviews of approved and non-approved school-sponsored trips to ensure consistency of policy implementation.

### *Successful Practices*

The following list shares successful practices that were identified as part of this evaluation. OSP will share these successful practices with principals.

- Including a blank on the permission slips that allows parents to seek financial assistance. This prevents children from looking “different.” They can turn in a permission slip like their peers, and the teacher can discreetly work out the finances with the child’s parents.
- Stating on permission slips what the alternative educational activity will be for children not attending a field trip. Parents become informed consumers.
- Beginning to plan overnight trips during the school year prior to the trip and informing parents well in advance. This allows parents to plan their schedules and finances.

## Appendix A

Items included as part of the document analysis:

- Related policies and regulations
  - Regulation EEA-RA, *Transportation of Students*
  - Regulation IPD-RA
  - Policy JFA, *Students Rights and Responsibilities*
  - Regulation JFA-RA, *Students Rights and Responsibilities*
  - Regulation JGB-RA, *Search and Seizure*
  - Policy JNA, *Curricular Expenses for Students*
  - Regulation JNA-RA, *Curricular Expenses for Students*
  
- Associated MCPS Forms
  - 210-4: *Travel/Study Approval for Overnight and Extended Trips out of the Washington Metropolitan Area*
  - 215-1: *Field Trip Ticket*
  - 280-41: *Field Trip Accounting*
  - 281-1: *Request/Accounting for Overnight Travel Funds*
  - 555-6: *Parent Financial Responsibility*
  - 560-31: *Application to Participate in an Activity Away from School for which MCPS Transportation is not Provided*
  
- *Principals Handbook 2007–2008, Section I*
  
- Trip-planning packets housed in OSP