

# Field Program Considerations For Institutions

The following guidelines apply to projects that have students or volunteer participants.

## **Pre-trip Legal Issues**

A field trip is an extension of the university, and all university policies still apply.

- Responsibility of Participants (expectations and tasks, responsibility to others, your expectations of them and what they can expect from you).
- Code of conduct and consequences
  - No alcohol and drugs
  - Sexual harassment
  - Unsafe and disruptive behaviors
- Medical conditions, emergency contact forms, insurance forms, special beliefs and needs.
- Students should be informed of potential hazards, what to expect in terms of weather, physical demands, and more.

This information should be reviewed and signed by all participants, volunteers, drivers and assistants.

## **Pre-trip preparations**

The institution should collect or complete the following before departure:

- Participant list with emergency contacts, field itinerary and contact information for the trip leader
- Emergency Action Plan (EAP)
- Vehicle inspections
- Driver training, clearance, instructions on how to get to the nearest hospital
- Personal and group gear requirements

## **Permits**

- Secure landowner, agency, or sampling permits

## **Insurance**

Most university liability coverage is typically restricted to “educational activities,” and many of the ancillary activities that accompany field trips (e.g., meals, campfires, camping, free time) may not be covered by the university’s insurance policy.

- Know what is covered by your institution’s policies
- As an additional precaution, field trip leaders should consider adding additional personal liability coverage to their individual insurance policies
- Be aware of activities that could be perceived as imprudent or unsafe

### **First aid and communications gear considerations**

- Wilderness Responder Training for trip leaders
- Comprehensive first aid kits, (backpack, vehicle, camp)
- Radios, cell phones and/or satellite phone
- Personal Locator Beacon (PLB)

### **On the way to the field**

- Use of institution vehicles vs. personal (if using these, driver and passengers should sign disclaimer)
- Safety equipment on board

### **In the field**

- Establish check-in times, communicate boundaries and expectations to the team

### **Incident reporting**

When researchers are in the field, CPS staff are on call 24/7 to respond to emergencies and incidents.

An incident is an injury, illness to people, or damage to field equipment. Those hearing about an incident should attempt to learn as much as possible from the research team or others involved. Important information includes:

- Date
- Location
- PI and home institution
- Summary of what happened
- Lessons learned
- Pictures or diagrams

To capture and communicate information to the NSF, CPS staff fill out the incident report form. Those who wish to self-report an incident are encouraged to use the form ([download it here](#)) and send it to the [Field Risk Manager](#).

### **International considerations**

- Do staff or students need supplementary medical insurance or Medevac insurance? (This will depend on what coverage is provided by the institution)
- Identify an expert at your home institution who understands the area where you are going and can be a home contact for dealing with a problem, should one occur