



California State University Monterey Bay

100 Campus Center • Seaside, CA 93955-8001

Student Field Trip Procedures

1.00 Purpose

This set of procedures supports the CSUMB Student Fieldtrip Policy.

2.00 Which field trips require these procedures?

This set of procedures is to be used for all curriculum-based student travel led by a CSUMB faculty or staff member, **except** for travel related to the following cases:

1. Field-intensive courses
2. Travel Courses
3. Study Abroad programs
4. Teacher preparation program
5. Intercollegiate sports
6. Service-learning placements
7. Internship placements, or
8. Independent student research not under direct supervision of CSUMB faculty or staff member.

“Field-intensive courses” are defined as those in which the field trip component is core to the learning outcomes. In Field Intensive and Travel Courses, either all, or a significant proportion, of the curriculum takes place away from campus. In these courses, the skills and experiences obtained in the field are not obtainable by other kinds of academic work, making the creation of “alternate assignments” untenable.

3.00 Trip Planning

When possible, the course instructor shall perform the following steps in time to list the fieldtrip on the course syllabus:

- a) Evaluation of site (usually based upon a site visit)
- b) Submission of a written Site Evaluation Report to the appropriate Department Chair, and
- c) Identification of the trip activities in the catalog “Course Description” and/or course syllabus with enough detail to inform student course selection.

If a site visit is impractical, the evaluation may be drawn from the instructor’s knowledge, or other sources. In the case of an “unplanned” trip that arises because of an unforeseen instructional opportunity, all procedures shall be followed except for posting the trip on the syllabus and course description. Note that signed liability paperwork is required at least 24 hours in advance of a trip, so “spontaneous” undocumented trips are not permitted. “***Site Evaluation Guidelines***” are provided below in Appendix A.

4.00 Curricular Planning

Although most of the preparatory work listed in section 4 could be completed months in advance of a field trip, the following steps could happen during the semester of the trip. It is recommended that they be completed at least several days in advance of the trip.

4.10 Create and Distribute an Instructional Agenda

An instructional agenda is a written document provided to students in advance of a field trip. It allows students to evaluate potential risks and benefits of a field trip. The minimum components of a field trip agenda are listed below, and a sample is provided in Appendix B:

1. Time and location
2. Detailed activities
3. Potential risks (associated with the specific location and activity)
4. Special training necessary to engage in the field trip activity and a means for participants to receive such training
5. A means to accommodate any special needs of the participants
6. An alternative assignment for those unwilling to accept the risk of participation
7. Health and safety information relevant to the field trip (a check-list might be provided of what students should bring)
8. Emergency procedures, and
9. A code of conduct, is specific behavior is expected or required.

4.20 Distribute and Collect Student Forms

Students must obtain, complete, and submit the following information to the instructor before participating in the field trip:

1. Emergency contacts
2. Signed and dated Release of Liability Form
3. Medical Consent Forms (if possible)

The Release of Liability Form must be submitted earlier than 24 hours before the day of the trip. If the student is younger than 18 years of age, a parent or guardian must sign the Release of Liability Form. Students will not be able to participate in the field trip if they do not have an approved Release of Liability Form.

These collected forms constitute a “list of participants and emergency contacts” identified in the Student Field Trip Policy. These forms must be “on file” in the appropriate Department office, where they will be available to the University Police before travel begins.

The instructor is responsible for distributing the required forms to students far enough in advance of travel.

5.00 Travel to the Site

In cases where CSUMB staff or faculty organize transportation on behalf of students, they shall do so in compliance with the California State University [*Use of University and Private Vehicles Policy Guidelines*](#) and the California State University [*Student Travel Policy*](#).

If private vehicles are used for travel, staff and faculty coordinating field trips are strongly encouraged NOT to organize transportation to the field trip site for students, but rather, to encourage students to self-organize and meet you at the trip site.

6.00 Periodic Site Review

The faculty shall conduct periodic site reviews of field trip locations based upon site visits or other sources. Potential criteria for triggering site review may include, but are not limited to the following:

1. Change in risk factors
2. Site sensitivity to visitor impact (may be environmental, cultural, or other)
3. Change in access or availability, or
4. Inactive use of site.

The faculty shall refer to the ***Site Evaluation Guidelines*** (Appendix A) for guidance in writing a brief Site Review Report that will supplement and update the original Site Evaluation Report listed in Section 3. The faculty shall submit the completed site review to the Department Chair, who shall determine the final disposition.

7.00 Departmental Procedures

The following list describes the responsibilities of the Chair and Department.

1. The Department Chair shall receive and file Site Evaluation Reports submitted by course instructors.
2. These reports shall be filed in the department office and organized by course name and number. This collection is called the “***Field Trip Inventory.***”
3. The Department shall store student emergency contacts, liability release, and medical consent forms received from the course instructor. They will be stored for one year following the semester of the trip. Forms for minors (<18) will be stored for two years following the semester of the trip.
4. The Chair receives sporadic “Site Review Reports,” and files them with the original Site Evaluation for that field trip.
5. The Chair determines the disposition of the site based upon the site reviews.

Documents may be stored electronically.

Appendix A: Guidelines for Site Evaluation and Site Review

Each field trip must have a “Site Evaluation” (see Section 3.00) that is either conducted in person or through other means, when a visit is impractical. The Site Evaluation Form identifies the base line of information to be gathered and used to assess risk and logistics. (Two examples are attached; one for natural settings and one for industrial/urban sites). The person conducting the site evaluation is encouraged to add additional considerations to the Site Evaluation Form, as necessary, based upon the particular field trip activities planned for the site. Additions can be made to the existing checklists and/or could be comprised of a brief narrative of anticipated risks.

All information related to Site Evaluations should be entered into the online database, **CSUMB Placements** (accessible at placements.csumb.edu). Once entered, Department Chairs will be able to log into the database to review, approve and/or negate field trip sites and activities.

*A thorough and well-thought-out Site Evaluation Form not only helps to reduce the chance of injury or accidents during Field Trips, it also provides the data necessary for the Instructional Agenda, the course syllabus, and the inclusive student informed consent. Further, once on file in the CSUMB Placements database, Site Evaluation Forms will be accessible to all academic units, thereby reducing duplicative efforts of faculty and staff across campus.

A “Site Review” (Section 6.00) can use the same check list as the Site Evaluation, with emphasis on any limiting factors or dangers that have increased through time.

Site Evaluation Form

This form is designed to streamline a site evaluation for Field Trip **risk assessment**.

Circle or check all appropriate descriptors.

This form might not cover all risks, so add text in the "Other risks" box.

Academic

Department:

Instructor name:

Course name and
number:

Location:

Evaluation date:

General setting urban industrial agriculture natural suburban other (describe)

Travel route:

Parking conditions:

Emergency considerations (alternate travel routes, etc):

RISK IN NATURAL SETTINGS

☐	wind	☐	landslides
☐	rain	☐	cave-ins
☐	snow	☐	off-highway vehicle traffic
☐	lightening	☐	rough or slippery roads
☐	excess heat/cold	☐	blowing sand
☐	sun exposure	☐	dust
☐	rough or slippery ground	☐	poison oak
☐	tripping/falling	☐	stinging nettle
☐	steep terrain	☐	other dangerous plants
☐	cliffs	☐	venomous reptiles and insects
☐	high altitude	☐	dangerous animals
☐	flood	☐	bees and wasps
☐	wading in swift streams	☐	loose dogs
☐	dangerous surf	☐	skunks
☐	rip tides	☐	no bathrooms for several hours
☐	Crossing roads with traffic		

Other Risks, notes on what students should bring, special training, special code of conduct, accommodating disabilities, restrictions due to rush hour traffic, tides, day length, weather, etc.

Student Requirements

☐	sun hat/sunscreen	☐	field book
☐	wind breaker	☐	Long pants
☐	parka	☐	gps
☐	rain gear	☐	site map
☐	closed-toed shoes	☐	water
☐	boots	☐	clip board

Continued...

Site Considerations

☐	endangered plants	☐
☐	endangered animals	☐

☐	no biological collecting	☐
☐	no geological collecting	☐
☐	site of cultural significance	☐
☐	erosion issues	☐
☐	speed limits on dirt roads	☐
☐	locked gates	☐
☐	private property	☐
☐	ranch animals	☐
☐		☐
☐		☐

Specialized student

Training

☐	compass	☐
☐	GPS	☐
☐	Survey equipment	☐
☐	Water safety	☐
☐	First aid	☐
☐		☐

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Academic

Department:

Instructor name:

Course name and
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Location:

Evaluation date:

General setting urban industrial agriculture natural suburban other (describe)

Travel route:

Parking conditions:

Emergency considerations (alternate travel routes, etc):

RISKS IN INDUSTRIAL SETTINGS

☐	falls/slipping
☐	slippery/rough surfaces
☐	large machinery with moving parts
☐	forklifts and other heavy equipment
☐	loud noise
☐	dust
☐	toxic or allergenic vapors
☐	shattered glass
☐	
☐	
☐	
☐	
☐	
☐	
☐	

Student Requirements

☐	closed-toed shoes
☐	special shoes (non-slip, steel toe)
☐	full length
☐	pants
☐	close-fitting
☐	clothing
☐	clothing for
☐	warmth
☐	no jewelry
☐	safety glasses
☐	earplugs
☐	hard hats
☐	
☐	
☐	
☐	
☐	
☐	

**Other Risks, notes on what students should
bring, or thoughts about accommodating
disabilities.**

Site Considerations

☐	
☐	
☐	
☐	
☐	
☐	
☐	
☐	

Continued

Specialized student
Training

Appendix B: Example of Instructional Agenda & Informed Consent

(Science Illustration Program)

The following is an example of an Instructional Agenda. It includes informed consent text. This material would accompany a general release of liability statement adopted from the CSU Chancellor's Office.

GENERAL INFORMATION REGARDING FIELD TRIPS:

- Your participation in course field trips is strongly encouraged but is optional. If you are unable to attend any particular field trip, you must complete a comparable make-up activity approved by the instructor in order to receive full course credit. Initial: _____
- Transportation will not be provided for any of the field trips. You are personally responsible for your own transportation to and from each field trip location. Initial: _____
- The class will be visiting a variety of locations, including undeveloped outdoor areas, natural parks, farms, museums, academic institutions, live animal parks and aquaria. In any of these locations, features of the natural or human-made environment may pose potential hazards—including (but not limited to) unpaved/unmarked trails, steep and uneven terrain, toxic fungi or toxic plants (such as poison oak, etc.), sources of water (such as flowing streams, open pools or tanks, ocean-shore environments, etc.), and general 'premises' risks in public sites (such as stairs, walkways, exhibits, storage cabinets, etc.). Wild, captive or domestic animals will be present at some locations—these must be treated with appropriate respect and caution. Do not try to touch or feed any animal during any field trip. Weather conditions on field trips will vary, and may range from direct sun and hot temperatures to rain, wind and cold. Always carry drinking water and warm clothing with you, wear appropriate footwear, and use hats and sunscreen as needed. You are responsible for bringing and using gear and clothing that will keep you comfortable and protected from the elements. All of the places we will visit have restrooms or portable outhouses, but these may be located some distance from where you eventually set up to draw. Take note of toilet location(s) at the beginning of the day, so you'll know where to find one when you need it. Initial: _____
- It is vitally important that each person conduct themselves in a mature, responsible, self-aware manner on field trips. Please comply with all posted, written or verbal warnings, signs, rules or instructions, and use good judgment and forethought when choosing where to walk, stand, or sit to draw. Remember where and when to meet the rest of the group at the end of the trip, maintain an awareness of the time, and do your best to keep some members of the group in sight at all times during the trip. Always be a polite guest at the places we visit so that you and others will be welcome back in the future. Initial: _____
- There is no guarantee of cell-phone coverage in the areas we will be visiting, but please bring cell phones and time-keeping devices with you if you own them. In case of an emergency, alert your companions and call 911 as soon as possible. Inform the instructor as soon as possible in the event of an emergency, but do not wait to talk to the instructor before calling 911 if emergency assistance is needed. In case of serious injury, leave one or more people with the injured person while other(s) go to get help. Initial: _____

INFORMATION ABOUT SPECIFIC FIELD TRIPS:

Fieldtrip 1: UCSC Museum of Natural History Collections
University of California, 1156 High Street, Santa Cruz, CA
Oct. 5, 2012; 1pm-3:30pm

Located on the UCSC campus, this natural-history collection consists of hundreds of preserved plant and animal specimens housed in cabinets, drawers, jars and trays. Wet specimens in this collection are treated with formalin, then stored in ethanol. Dry specimens are preserved without use of chemicals, although a residual "moth-ball" (naphthalene or dichlorobenzene) smell may be noticeable from earlier preservation methods. There is a slight but unlikely chance that some of the oldest specimens may have been treated with arsenic. For the sake of these scientifically-valuable specimens as well as the people studying them, it is important to use the collection with care. This means everything from taking off your daypack while maneuvering within the close quarters of the museum, to handling specimens only as directed by the museum curator and/or the course instructor, to washing your hands both before and after handling items in the collection.