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FIELD COURSE (Domestic) Planning Time-Table

Starting a new field course is a big undertaking and is typically highly rewarding for the course leader and the participants. This document will assist you in identifying the various tasks involved, provide some starting resources and identify people who can help you in planning a successful field course. This planning time-table is meant to be used as a guideline for field courses. We want to evolve this template based upon the input and feedback of those who use this planning tool.

The timeline recommended here will vary depending upon how remote your field course site is and whether you have reasonable access to supplies. The more remote, the more time you should allow for your preparations.

Please note that these recommendations are general and will not be all-inclusive, as this depends upon your individual course needs.

General Considerations when Creating a Field Course

Course Academics

- If new, the course outline needs to be approved by the Department Chair and should involve consultation with the appropriate Academic bodies within the unit.
- Typically to maximize course learning and to ensure appropriate precautions, pre-trip orientations, classes and logistical meetings will be needed.
- Field courses are normally run on a full cost recovery basis, including all appropriate contingencies.

- In order to charge students a course fee, the designated course must have a formal University approval for extra fees. The fee has a set amount or range as indicated in the Calendar. If there is no existing approved fee, the approval process can take up to a year.
- Students pay tuition and that should cover instructional fees. Additional fees may be charged for additional expenses (e.g. travel, accommodation, entry fees) pending Department/University approval. Students should be made aware that they also may incur additional expenses (e.g. specialized clothing, safety equipment, personal travel expenses).
- Special efforts need to be made to recruit an appropriate number of students. The exact timing of the course will also have a serious impact on the appeal for students (e.g. having it over the summer will impact student's earnings).
- For Special Registration courses, they can be promoted through their website and brochure (see link below).

Leadership

- Regardless of the size of the course, in addition to a paid University employee, a second U of A employee is needed who has the authority, knowledge, contacts, and spending authority to take over full leadership of the group in case of emergencies, illnesses, split groups or other contingencies.
- Group travel can be very intense for leaders and participants alike. Careful planning needs to be put into maintaining energy, enthusiasm, health and good morale for all concerned. Some field schools arrange trips so that the course starts at the destination airport and ends at the departure airport thereby avoiding handling more funds from students, allowing them to take a round-about routing on the way to the course and if they want to stay over for more touring or deviate on the way home, they can do so without interrupting the trip.
- Some of the many roles that a field course leader will take on include instructor, tour guide, authority figure, counselor, nurse, decision-maker, crisis manager and morale leader, all on an around the clock basis.

Key Resources and Contacts

- [U of A Field Research Office](#)
- [Office of Insurance and Risk Assessment](#)
- [UofA Protective Services \(emergency response\)](#)

Faculty/Department Resources

- Director, International Programs (if there is one)
- Associate Dean, Academic
- Undergraduate Program Committees as appropriate
- Student Services
- Fundings Opportunities
 - Special Registrations (Registrar's Office) may provide some funding towards such courses as long as enrolments are 12 students or more.
- The Alberta government may have funding programs applicable to your course.

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Practical Considerations

- With any distant destinations, the course leader should have direct personal experience with the area or at the very least be working in collaboration with reliable professional contacts based at the field course location.
- Have back-up plans in place in case arrangements fall through for whatever reason (activities rained out, booking glitches, etc.)
- Except in unusual circumstances, the participation of family members who are not official participants in the field course, is discouraged and would require appropriate arrangements for legal liabilities and steps to ensure that no U of A funds are required for their support.
- Major logistical planning time is required going far beyond the course academics, and typically 6 months or more is needed for appropriate research, arrangements and lead time.
- It is preferable to include transportation arrangements within the course fee so that standardized arrangements (including economies of block bookings) can be made for all participants, keeping the group together, and eliminating the situation whereby some participants may arrive at the starting destination late (cancellations, weather delays, missed connections, etc.)
- All proposed U of A drivers need to be approved well in advance through the University of Alberta Vehicle Management and Driver Safety Program at [U-Drive](#) and all drivers need to be selected for maturity, responsibility, good safety records, and preferably familiarity with local driving conditions/cultures.

Due Diligence

- A field course is a serious responsibility for the course leader.
- Some locations pose higher risks than others and these need to be assessed at the earliest planning stages.

Students

- There needs to be very clear expectations and guidelines governing student behavior. Students need to be clear that inappropriate behavior can have serious repercussions, potentially including being sent home.
- Advise students that the University's [Code of Student Behavior](#) will apply, and specify additional appropriate expectations.
- Students need to be well-informed about risks and hazards throughout the course, including those foreseeable during any non-instructional time that they may have on their own.
 - Careful thought must be put in to appropriately preparing students for their safety and to maximize their learning – refer to [Field Research Office's FAP](#).
 - Psychologically preparing the students for the conditions they will face is essential: lots of travel, rain-out days, shared accommodations, tiring days, different foods, etc. Remember that students may have little or no relevant field experience and will have no prior knowledge to draw on in terms of appropriate preparations, packing, etc.

- Frank discussions must ensue about students not leaving the group without notice or taking off alone. One day hold up means a month of person-days wasted waiting for one lost or a straggler. Serious consequences for non-compliance should be incorporated and explained to the students prior to registering and before departure.
- Good communication is critical before and during the trip.
- If students wish to leave the field school early or make alternative arrangements to travel back by themselves, liabilities must be identified before going and the Office of Insurance and Risk Assessment should be told. Students must be briefed that all financial and legal responsibilities are their own once they separate from the group. This accommodation for customization can result in significant administrative time.

8 to 12 months prior to field course start

Is the Field Course possible?

- Research the safety and appropriateness of locations for field course

Course Planning

- Develop course proposal (including pre and post-trip components).
- Identify course leaders and any partnerships or region contacts.
- If new, the course outline needs to be approved by the Department Chair and should involve consultation with the appropriate academic bodies within unit.
- Typically, to maximize course learning and to ensure appropriate precautions, pre-trip orientations, classes and logistical meetings will be needed.
- Consider and discuss funding opportunities with appropriate academic bodies.
- Confirm course timing.
- Discuss student fees with Department Chair.
- Make special efforts to recruit appropriate number of students (e.g. posters, announcements in classes, create a facebook page).

6 to 8 months prior to field course start

- Meet early with Faculty/Department Financial Officer regarding purchasing, credit cards, travel claims, expense reimbursement, handling student fees, University policies, payment deadlines and other financial aspects.
- Develop appropriate plans for administrative management
- Propose course budget to Department Chair.
- Finalize exact course fee. In order to firm up registration numbers early enough to commit to booking arrangements, students typically need to pay a sizeable non-refundable deposit to the Department by a certain date and other financial commitments to be made. Determine the amount and date for the non-refundable deposit as well as for the final amount to be paid.
- Arrange for information session for interested students. Advise them of any significant health risks, fitness issues, and practical considerations that may affect their suitability for the course.
- Have students register for course with a deadline of at least 5 to 6 months prior to the start so that you know who you are taking. Ask for the non-refundable deposit by a date 4 to 5 months prior to course. Ask students to fill out the Emergency Information forms so that their suitability

for the course can be assessed. At this time, also set deadlines for proof of health insurance, waiver sign-offs, etc.

Early Planning

- Start drafting your [Field Activities Plan](#) (FAP) which will help you ensure you address issues such as training needs, lodging, equipment, communication needs, emergency response plan, etc.
- Prepare Standard Operating Procedures for things such as vehicles, equipment, communications, risky procedures (e.g. climbing, chainsaw, working with biohazards, etc.)
- Consider your hiring needs if you require additional instructors, assistant leaders, etc. (e.g. do they require specific qualifications and how hard will it be to find one?) – consider training needs. If you believe that it will be difficult to find appropriate personnel, begin hiring process now; go to the [Field Research Office's web page for tips on hiring](#).
- Find out about seasonal weather issues and time zones. If you are going out of Province, make sure that you are aware of that province's laws as they apply.
- Make initial inquiries for permits, permission requirements, licensing, access to lands, animal use or human ethics approval (animal use takes two months to get back) if needed. [See FRO's web page on Permissions](#) and/or contact the Field Research Office for help with this.

5 months prior to departure

Planning

- Determine your communication needs – see [Communication page of FRO Website](#) (kind, amounts, cost). If you plan to use cell phones or satellite phones, ensure they will work where you are going and know if there will be roaming charges which can be very high depending on your plan. Be aware that it may be useful to purchase inexpensive cell phones and purchase SIM (Subscriber Identity Modules) cards to use in the destination country.
 - Draft** a list of equipment you will need to take with you - see [FRO example list of equipment](#). Keep in mind transportation of dangerous goods, transporting insect samples, etc.
 - In general terms* **draft** your trip description and itinerary which may include the following:
 - Route (starting and end points)
 - Times of departure
 - Stopping points
 - Return time stopping points
 - Location of trip, including description of terrain
 - Maps (in sufficient detail to be able to locate the group in case of emergency),
 - Activities engaged in during the course
- *with as much detail as is known at this time and which will be revised and expanded over the next months prior to departure.
- Update Field Activities Plan.
 - Dependent upon where your field course is taking place (e.g. evacuation/rescue coverage), you may require extra insurance [see FRO's Insurance webpage](#). You can also call the Office of Insurance and Risk Assessment (780-492-8887) for advice as to the kind of insurance you may need and good places to obtain any necessary coverage. Note: non-Canadian participants may require additional health insurance.
 - Visit [FRO's site](#) for some quick guidelines for vehicles and [U-Drive's](#) site for more details. If you will be driving students you must obtain an Alberta Class 4 driver's license.

4 months prior to departure

- Identify training required for leaders/students and enroll them in training sessions as necessary. [FRO's Training webpage](#)
- Ask for all students to pay the balance of the course fee to be paid in full.
- Contact local officials as necessary and appropriate (ambulance, forestry service personnel, wardens, collaborators, business partners, police) to let them know particulars of your field course including the time period and place.
- Secure a receipt book from UAlberta Financial Services to take with you. Leaders need to know that to be reimbursed without a receipt from a provider, they need their own receipt book and a witness to sign to verify the amount of the transaction.

3 months prior to departure

- Confirm your lodging requirements [see FRO's web info on Lodging](#) or email the [Field Research Office](#) for information on available lodging for researchers.
- Check for First Aid Kits required and order if you don't have enough. As of April 30, 2012, FRO will have special Emergency First Aid Kits with Automated External Defibrillators. See [FRO's website for info on First Aid Kit requirements under OH&S Safety Code](#).
- Order [Daily Field Safety Log Books](#) to accompany the Field Activities Plan.
- Ensure the trip leader understands the U of A incident/injury reporting requirements. See [EHS Incident/Injury Portal](#) for procedures and forms. Take paper copies of reporting forms with you.

2 months prior to departure (at least)

- Verify availability and source for rental or purchase of any communication device to be taken on trip (e.g., cell phones, 3-watt bag phones, satellite phones). Include frequencies to be used for radio contact. If you need to use a particular radio frequency to communicate, ensure you leave enough time to get properly set up radios. Ensure all paperwork is submitted (e.g. setting up a cell phone through AICT or obtaining federal licensing for radios).
- Get Emergency Information Forms in order:
 - Gather copies of Emergency Information Forms to take out into the field with you and review for disclosed health issues.
 - Speak with individuals with any disclosed health issues and plan for precautions if necessary (including possible restrictions on activities in field).
 - Ensure proper filing of original Emergency Information Forms (with Faculty/Department – FOIPP Officer if have one)
- Advise First Aid Attendant of any pertinent health problems of participants and ensure additional precautions made to accommodate for these.
- As part of the Field Activities Plan, ensure that an Emergency Response Plan is in place including
 - emergency contact numbers for University administration, all participants on trip
 - nearest hospital or nearest medical aid info
 - check-in system as appropriate – the frequency and necessity to check in will depend on the group size and where they are going
 - a plan in place for contacting emergency services
 - evacuation route in case main route is blocked by hazard e.g. fire

- Hold pre-trip course components and orientation session and including:
 - finalize your Field Activities Plan and provide all participants with a copy for their perusal, pointing out inherent risks of activities.
 - finalize package of participant info including (EIF, Volunteer Registration form, informed consents for UofA students and non-UofA participants, list of training and equipment provided, etc.) See [FRO's Planning section for waivers](#).
 - Confirm all personnel has taken appropriate training
- Check out the [UAlberta WCB unit](#) within Human Resources for your questions on WCB coverage and reporting.

1 month prior to departure

- Review supply list.
- Ensure all equipment is operable and if not, make arrangements to have repaired, if necessary.

3 weeks prior to departure

- Gather and retain (dept. and at-course) copies of proof of insurance; copies of pertinent travel documents, waivers, vaccination info, ERP, FAP, and travel itineraries.

2 weeks prior to departure

- Review FAP to ensure it is complete and revise if necessary and distribute to all participants.
- Review FAP in detail with participants.
- Finalize your trip description and itinerary. A detailed itinerary including flights or other transport information with contact information for scheduled locations must be filed with the Dept or Faculty.
- Insurance – make sure you have all insurance documents with you.

1 week prior to departure

- Make sure FAP and ERP is filed with department and copies are in hand to be taken to the course location.
- Make sure Daily Field Safety Log Books are packed and taken with you to the field and that all are aware on how to use same.
- Call and confirm with locals, as necessary, your attendance at site, number of personnel involved in the course and expected start and end dates.
- Ensure all permits/permissions/access to lands are in place.
- Finalize your trip description and itinerary. This must be on file with the Dept or Faculty.
- Make sure your list of equipment is updated and send a copy to the Office of Insurance & Risk Management to ensure that they know the equipment that will be out in the field in case of an incident.
- Have a plan in place in case a student wants to leave the course early.

During the course

- Stay in contact with your faculty/department.

- Monitor and assist students who may show signs of stress or withdrawal.
- Take photos that can be used for trip report, future promotions or media coverage.

After return/post course

- Tell students to monitor their health for 21 days post-return and if they have any of the following symptoms they should consult with their health care provider:
 - High fever (greater than 38.9°C / 102°F) that lasts more than 2 days. Fever may be accompanied by chills, headaches, stiff neck, abdominal pain, muscle and/or joint pain, skin rash, yellow skin or eyes and /or bloody diarrhea.
 - Nausea, vomiting and/or diarrhea that lasts more than one week.
 - Persistent cough and shortness of breath.
 - Swollen glands in any area of the body
 - Skin lesions that are enlarged, are painful or ulcerate
 - Or any symptoms that are unusual for you.

If participants have received an animal bite, they should consult your health care provider even if they have received first aid treatment in the field.

Advise others within your group to monitor their health and to tell you if they develop health conditions that may be related to the trip.
- File expense claims as soon as possible.
- Thank external contacts/partners
- Complete any post-course assignments/evaluations possibly including an informal gathering for participants to share photos, experience, stories
- Complete injury/ incident reports (include near misses), if necessary. Note all injuries/incidents must be reported to the Office of Environmental Health and Safety within 24 hours of incident. See [EHS Injury Portal](#).
- Debrief:
 - Did any first aid treatments or evacuations take place during the field course? Reflect on what went wrong, debrief and determine what could have been done better- revise FAP to include new precautions, if any.
 - Did any participants leave before the end of the course? If yes, details of this should be written up and submitted to the Faculty and the Office of Insurance and Risk Assessment.
 - Was any equipment lost or damaged on the trip? If so, make list of lost equipment and action taken.
 - Report debrief outcomes to [FRO](#) so that others can benefit from your experiences.
- Equipment check-in and return (inspection, repairs done that are needed, cleaned, etc.)
- Archive all documents for access next year to make planning of subsequent field course easier.
- Provide input to [Field Research Office](#) for improvement to this planning tool, FAP, Hazard Assessment Tool and website.

Appendix A: Suggested Content for Student Orientation Information

The following content is most typically split between an initial session to promote interest in the course and a later more detailed logistical planning session for students who have decided to proceed.

Introduction to Leaders

- Provide names, backgrounds, experience with destination

Course Academics

- Academic goals and priority outcomes
- Topics to be covered
- Assignments/classes/meetings before and after the trip

Itinerary

- Dates, locations, activities
- Means of transport
- Any breaks or de-stressor activities
- How evenings and weekends will work

Anticipated Costs

- Course Fee, tuition, University Fees, travel expenses
- Deadline for Non-refundable deposit of \$_____ is _____.
- Deadline for full payment (non-refundable) of \$_____.
- What is covered and not covered?
- Estimate of Cost Breakdown (to be handed out)

Challenges

- Culture, language
- Hectic days/travel arrangements
- Banking arrangements
- Expensive international cell phone charges
- Different costs of international goods

Hazards

- Typical hazards in the area and what will be done to reduce the risks
- Specific health risks, immunizations required and special health precautions
- Emergency Response Plan in place and what the students' roles will be in it
- Expectations of participants in minimizing the risk to the hazards

Guidelines, Rules and Expectations

- U of A Code of Student Behavior applies
- Requirements even when you're on your own time
- Alcohol and drugs
- Local customs
- Curfews

What to Pack?

- Suggested packing list and luggage recommended
- Special requirements for area, weather
- Weather and culturally appropriate clothing for the destination and points between
- Personal protective equipment as required
- Appropriate footwear
- Cameras
- Medicines/prescriptions

Logistics

- Accommodations? How are room-mates determined?
- Rendezvous time, locations, instructions for starting the course.

Advance Task List for Participants

- Any required immunizations
- Obtain Health Insurance (foreign students) and other types of insurance if needed
- Pre-trip course content/meetings/classes
- Line-up appropriate funds for the course and financial expenses during course
- Topics to be covered
- Assignments/classes/meetings before and after the trip
- Suggested reading and recommended websites for advance preparation
- If language differences, learn basics

Students concerns/questions?**Handouts**

- Course poster/course outline
- Itinerary
- Cost Estimate Breakdown