

Field Trip Planning and Approval Form

This form should be completed by the Field Trip Coordinator (“FTC”) and submitted to the Department Chair/School Director or Faculty Dean (if applicable) for endorsement and approval before the Field Trip is undertaken.

A. General Information

Department/School/Faculty:	
University Officer Responsible for Authorizing Field Trip and Appointing the Field Trip Coordinator and Other Field Trip Leaders/Assistants:	
Course(s) Associated with Planned Field Activity/Trip:	
Instructor(s)/Faculty Member(s) Responsible for Course(s):	
Term Course(s) Offered:	
Location of Field Activity/Trip:	
Dates of Departure and Return:	
Estimated Number of Participants:	
Summary of Field Trip Activities and Purpose(s):	

B. Academic Details

(1) Is the Field Trip a compulsory component of any course or program? (Mark appropriate box)	Yes	No
(2) If the Field Trip is compulsory, is this referenced:		

(a) on the course syllabus?	Yes	No
(b) in the calendar description?	Yes	No
(3) If the Field Trip is compulsory, is an alternative assignment available in the event that someone is unable to participate?	Yes	No
(4) Please describe the arrangements that can be made for those unable to participate in the Field Trip:		

C. Field Trip Leadership Team

(1) List in order, starting with FTC, the official leadership for the Field Trip (fill in/check all boxes that apply – and add or delete rows as necessary):

Name	Contact Information (telephone & email)	Position/Duties	First Aid Training	CPR Training

(2) Has the head of the unit authorizing the Field Trip formally appointed in writing the FTC and other Field Trip leaders?	Yes	No
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D. Field Trip Itinerary Details

(1) Please provide details on the planned Field Trip (add or delete rows as necessary):

Date(s)	Time(s)	Destination(s)	Site Activities

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(2) Transportation and travel arrangement notes:

Travel by commercial transportation companies (e.g. bus, airline) is preferred because it reduces the University's liability exposure. If such transportation is not feasible, however, the following forms may be used in descending order of preference (liability exposure increases at each level):

- a) University fleet vehicles authorized for this purpose and driven by individuals authorized by the University;
- b) Rented vehicles;
- c) Personal vehicles.

- In the case of rented or personal vehicles participants should be advised beforehand in writing that the University discourages car-pooling and that drivers and their passengers travel at their own risk.
- If rented or personal vehicles are used drivers should have a minimum of \$2 million third party liability insurance; in the event of an accident in which the driver is at fault, the driver's personal insurance will be called on first.

(3) Describe the travel arrangements for the Field Trip:

(4) Describe travel arrangements for participants with special needs, if applicable:

Not Applicable
("N/A")

(5) Will participants receive copies of the full Field Trip itinerary, with arrival/departure times included?

Yes

No

(6) Will participants be required to sign a travel sign-in sheet both departing from and returning to Field Trip sites?

Yes

No

(7) Describe what will you do if someone becomes lost at any point during the Field Trip or misses a trip back from the Field Trip site:

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(8) Lodging and Accommodation Arrangements: (Fill in the boxes – add or delete rows as necessary)

Lodging Details: Name	Full Address	Phone Number (with area code)	Website	Dates

E. Risk Management

(1) Has a field site visit been conducted?	Yes	No
(a) If “Yes”, when? <u>Answer</u> :		
(b) If “No”, is the FTC sufficiently familiar with and able to demonstrate sufficient Knowledge about the area? <u>Explain</u> :		

(2) List identified hazards related to activities or the environment that participants may encounter during the Field Trip (e.g. climbing, high altitude, extreme heat, extreme cold, rough terrain, or water, manual lifting (carrying or handling heavy loads), wildlife, insects, poisonous plants, endemic disease, biohazards, firearms, explosives, dangerous chemicals, violence, powered or hazardous equipment, and/or other hazards):

(3) Will there be any environmental laws, regulations, or protocols associated with the Field Trip site(s) with which the Field Trip participants will have to comply?	Yes	No
(a) If “Yes”, describe:		

(4) Do participants require any personal protective equipment to participate in the Field Trip?	Yes	No
(a) If "Yes", in the box beside each item below check off what personal protective equipment is required:		
Safety Glasses		
Gloves		
Knee/Shin Guards		
Protective Headwear/Hard Hat		
Face Shield		
Flame Retardant Clothing		
Coveralls		
Hearing Protection		
Life Jacket		
Other (identify):		

(5) List required personal supplies that each participant is advised to bring along (e.g. boots, hat, raingear, sunglasses, sunscreen, insect repellent, suitable clothing, footwear, food, water, etc):

(6) Identify any special requirements for participation in the Field Trip (e.g. special skills, level of fitness, certification).

(7) Any travel or work should always be done in pairs or in a group. Is a process in place to ensure that no one is working or travelling alone?	Yes	No
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(8) Are participants being advised that the Field Trip activities must be kept alcohol-free - or the University's insurance coverage will be jeopardized in the event of an accident?	Yes	No
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(9) Are participants being advised that, for the duration of the Field Trip, they will be bound by the <i>Code of Student Behaviour and Disciplinary Procedures</i> (at https://www.lakeheadu.ca/faculty-and-staff/policies/student-related/code-of-student-behaviour-and-disciplinary-procedures) and all other applicable University policies and regulations?	Yes	No
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(10) What methods of communication (e.g. two-way radios, walkie-talkies, satellite phones, cell phones, GPS beacons, whistles, air horns, flares, etc.) will be in place to maintain contact with other participants, with the University, and to acquire emergency assistance in the event that may be necessary?
Answer:

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(11) Is there a communications plan with scheduled contacts?	Yes	No
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(a) If "Yes", describe:

(12) Will Lakehead Security Services and the official contact for the unit authorizing the Field Trip be informed about the Field Trip prior to departure?	Yes	No
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(13) Does the FTC have the emergency contact information of each participant?	Yes	No
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(14) Will participants be expected to bring their health cards and other official photo ID?	Yes	No
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(15) Describe plans/protocols for emergency response, including evacuation if necessary:

(16) In case of emergency, have arrangements been made for evacuation of participants with disabilities?	N/A	Yes	No
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(17) Access to Medical/Emergency Services:
(a) Name of hospital/emergency services nearest to Field Trip site? <u>Answer:</u>
(b) Distance of hospital/emergency services from Field Trip site? <u>Answer:</u>
(c) Contact telephone number of hospital/emergency services? <u>Answer:</u>

F. International Field Trip

(1) In organizing any Field Trip to an international destination, the FTC must consult with the Canadian Government's <i>Travel.gc.ca</i> website at: http://travel.gc.ca/ and especially the <i>Country Travel Advice and Advisories</i> page at: http://travel.gc.ca/travelling/advisories to check regularly for news and travel advisories and warnings for the country and the region(s) of

the country where the Field Trip will be conducted. Moreover, this website also provides a good source of information on the country (or region) for all participants on topics such as:

- Country Travel Advice
- Travel Documents
- Registration of Canadians Abroad
- Entry/Exit Requirements
- Canadian Embassies and Consulates
- Emergency Information
- Security
- Living Abroad
- Health
- Laws and Culture
- Disasters and Climate

(2) For the duration of the planning for and the actual international travel, the FTC must subscribe to receive Travel Updates:

<http://travel.gc.ca/news-warnings/subscribe>

(3) In the event that there is a change to the travel advisories and warnings or the risk level, the FTC must provide an update of this change in status to the head of the unit authorizing the Field Trip.

(4) Country Destination for the Field Trip:

(5) As of [insert date], the "Advisories" for the destination country were listed as (check box beside applicable Advisory):

Exercise normal security precautions	
Exercise a high degree of caution; see also regional advisories	
Exercise normal security precautions; see also regional advisories	
AVOID NON-ESSENTIAL TRAVEL; see also regional advisories	
AVOID ALL TRAVEL	

NOTES:

(a) Lakehead University will **not** authorize travel to

(i) any country for which the Government of Canada's Advisory reads: "Avoid Non-Essential Travel" or "Avoid all Travel", or

(ii) any region for which the Government of Canada has issued a Regional Advisory.

(b) If the Canadian Government's Advisory reads "Exercise High Degree of Caution" the FTC must consult with the head of the unit authorizing the Field Trip before proceeding any further in planning or organization. The unit head may wish to consult more widely.

G. Post Field Trip Duties

(1) If an incident/accident occurs during or in relation to the Field Trip, will the FTC submit completed Incident/Accident Report form(s) to Security Services and, if applicable, the HR Health and Safety Officer?	Yes	No
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(2) Will the FTC ensure that all forms (e.g. waivers, sign-in sheets, accident reports, Field Trip evaluations) are filed securely (either in hard copy or in scanned electronic format) in the office of the unit authorizing the Field Trip for a period of ten (10) years before being destroyed?	Yes	No
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(3) Additional Comments:

H. Formal Risk Analysis

(1) Well prior to the Field Trip the FTC should conduct a risk analysis with the following components (if a factor that could aggravate a risk, e.g. harsh environmental conditions or bad weather, is a real possibility it should be identified and analyzed as a separate risk):

- a) Identification of each significant risk associated with the Field Trip;
- b) Likelihood of the risk materializing on the following numerical scale: 1 = unlikely; 2 = possible, less likely; 3 = possible, more likely; 4 = very likely;
- c) Gravity of the risk materializing on the following numerical scale: 1 = insignificant impact; 2 = modest impact; 3 = significant impact; 4 = grave impact.
- d) Calculation of the risk's Severity = Likelihood x Gravity;
- e) Response to each risk: Risks with Severity ≤ 2 can be accepted with little or no mitigation; risks assessed between 3 and 12 should be mitigated to the point where the risks are acceptable – or they should be avoided; and risks that are 16 in Severity should be avoided. The FTC should briefly identify the proposed appropriate response to each risk.

(2) The risk analysis for the Field Trip can be plotted in the following table (add or delete rows as needed):

Risk Identification	Likelihood (1 – 4)	Gravity (1 – 4)	Severity (L x G)	Response – resulting in adequate mitigation of risk

(3) If the risk analysis indicates significant risk severities (≥ 8), or if the Field Trip is to be conducted outside Canada, an informed consent, waiver or liability disclaimer should be considered for participants (check with the Office of Risk Management).

I. Budget for Planned Field Trip

(1) Expenses Associated with the Field Trip (check box beside applicable category – and add information as required):	
(a) Costs borne by Departmental budget - students not assessed separate fee	
(b) Each student assessed fee by virtue of their registration in the course Fee amount: \$	
(c) Each student responsible for their own costs Estimated amount: \$	

(2) Breakdown of anticipated budget/costs to student participant (fill in applicable boxes):

Specifics:	Estimated Cost	Field Trip Fee Assessed at Time of Registration	Cost Borne by Participant - Collected by University	Cost Borne by Participant During Field Trip
Round Trip Air fare	\$			
Ground Transportation	\$			
Accommodations	\$			

Food, Incidentals, etc	\$			
Miscellaneous Materials (course materials) associated with field trip	\$			
Extended Health Insurance	\$			
Visas, Immunizations	\$			
TOTAL:	\$			

(3) Estimated expenses for FTC and other University personnel per individual (fill in applicable boxes):

Round Trip Air fare	\$	/Individual
Ground Transportation	\$	/Individual
Accommodations per day	\$	/Individual
Food, Incidentals, per day	\$	/Individual
Other fees	\$	/Individual
Extended Health Insurance	\$	/Individual
TOTAL:	\$	/Individual

(4) If students are responsible for some/all of their own costs:	
(a) What arrangements are in place to collect these monies from the students? <u>Answer:</u>	
(b) What arrangements will be in place with the University's Financial Services to collect, disburse funds associated with the Field Trip? <u>Answer:</u>	

(5) Is there any third-party (ies) involvement in organizing or executing the Field Trip at its destination?	Yes	No
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(a) If the answer is "Yes", describe fully, including all costs associated with the third-party (-ies):

J. Signatures Confirming Review and Approval of This Form

1. Signature of Authority in Sponsoring Unit: - Date of Authority's Approval:
2. Field Trip Coordinator (FTC)'s Signature: - Date of FTC's Approval:

Note: If there is any concern about the risks involved in the Field Trip the Director of Risk Management should be consulted.