

HUMBOLDT STATE UNIVERSITY

Risk Management and Safety Services

Field Trip Guidelines - Checklist

- ___ Review HSU Field Trip Policy
- ___ Investigate site and develop and document plans for activity.
- ___ Complete arrangements with owner/manager of site/area and support services if any.
- ___ Obtain contracts and agreements (for access, food, leases, lodging, rent, support services, transportation, etc.). They must be reviewed and signed by Humboldt State University (HSU) Department of Contracts and Procurement.
- ___ If proof of insurance is required, complete an Insurance Request Form. Requests should be submitted at least two weeks prior to the trip.
- ___ Identify risks, analyze impact of risks, and develop and implement plan to reduce risk to participants.
- ___ Provide students with:
 - ___ Advance notification of required field trips
 - ___ Written instructional agenda including health and safety instructions
 - ___ Information about the site/area
 - ___ Emergency procedures including emergency telephone numbers and contacts
 - ___ Information regarding applicable rules of conduct; and
 - ___ Training for equipment to be used
- ___ Arrange for accommodations for student with special needs
- ___ Students are to complete the Release of Liability Form online
- ___ Arrange for transportation (See Field Trips Transportation Options)
- ___ A copy of the completed roster goes with the field trip leader, the department office and UPD has access to the electronic file. In addition, you should take roll at the beginning and end of the field trip and retain a copy of the “roll sheet” following the completion of the trip. Students leaving during the field trip should sign out on a sign out release agreement.
- ___ Other specific responsibilities for leaders of the field trips related to accident include:
 - Emergency Response Reporting Incidents and Accidents
Form STD 268 Accident Report (Other than Motor Vehicle)
 - Reporting Vehicle Accidents
Form STD 270 Vehicle Accident Report
- ___ International Travel – Contact International Programs for specific requirements.

HUMBOLDT STATE UNIVERSITY

**RELEASE OF LIABILITY, PROMISE NOT TO SUE, ASSUMPTION OF RISK AND
AGREEMENT TO PAY CLAIMS**

Activity:

Activity Date(s) and Time(s):

Activity Location(s):

In consideration for being allowed to participate in this Activity, on behalf of myself and my next of kin, heirs and representatives, **I release from all liability and promise not to sue** the state of California, the Trustees of The California State University, California State University, Humboldt State University, and their employees, officers, directors, volunteers and agents (collectively “University”) from any and all claims, **including claims of the University’s negligence**, resulting in any physical or psychological injury (including paralysis and death), illness, damages, or economic or emotional loss I may suffer because of my participation in this Activity, including travel to, from and during the Activity.

I am voluntarily participating in this Activity. I am aware of the risks associated with traveling to/from and participating in this Activity, which include but are not limited to physical or psychological injury, pain, suffering, illness, disfigurement, temporary or permanent disability (including paralysis), economic or emotional loss, and/or death. I understand that these injuries or outcomes may arise from my own or other’s actions, inaction, or negligence; conditions related to travel; or the condition of the Activity location(s). **Nonetheless, I assume all related risks, both known or unknown to me, of my participation in this Activity, including travel to, from and during the Activity.**

I agree to **hold** the University **harmless** from any and all claims, including attorney’s fees or damage to my personal property that may occur as a result of my participation in this Activity, including travel to, from and during the Activity. If the University incurs any of these types of expenses, I agree to reimburse the University. If I need medical treatment, I agree to be financially responsible for any costs incurred as a result of such treatment. I am aware and understand that I should carry my own health insurance.

I am 18 years or older. **I understand the legal consequences of signing this document, including (a) releasing the University from all liability, (b) promising not to sue the University, (c) and assuming all risks of participating in this Activity, including travel to, from and during the Activity.**

I understand that this document is written to be as broad and inclusive as legally permitted by the state of California. I agree that if any portion is held invalid or unenforceable, I will continue to be bound by the remaining terms.

I have read this document, and I am signing it freely. No other representations concerning the legal effect of this document have been made to me.

Participant Signature: _____

Participant Name (print): _____

Date: _____

If Participant is under 18 years of age:

I am the parent or legal guardian of the Participant. **I understand the legal consequences of signing this document, including (a) releasing the University from all liability on my and the Participant's behalf, (b) promising not to sue on my and the Participant's behalf, (c) and assuming all risks of the Participant's participation in this Activity, including travel to, from and during the Activity.** I allow Participant to participate in this Activity. I understand that I am responsible for the obligations and acts of Participant as described in this document. I agree to be bound by the terms of this document.

I have read this two-page document, and I am signing it freely. No other representations concerning the legal effect of this document have been made to me.

Signature of Minor Participant's Parent/Guardian

Name of Minor Participant's Parent/Guardian (print)

Date

Minor Participant's Name

THE CALIFORNIA STATE UNIVERSITY
OFFICE OF THE CHANCELLOR



BAKERSFIELD

CHANNEL ISLANDS

August 23, 2011

CHICO

DOMINGUEZ HILLS

MEMORANDUM

EAST BAY

TO: CSU Presidents

FRESNO

FROM: Charles B. Reed
Chancellor

FULLERTON

HUMBOLDT

SUBJECT: Field Trip Policy and Procedures—Executive Order No. 1062

LONG BEACH

LOS ANGELES

Attached is a copy of Executive Order No. 1062, which establishes policy and procedures for campus field trips.

MARITIME ACADEMY

In accordance with policy of the California State University, the campus president has the responsibility for implementing executive orders where applicable and for maintaining the campus repository and index for all executive orders.

MONTEREY BAY

NORTHRIDGE

If you have questions regarding this executive order, please contact the Office of International Programs at (562) 951-4790.

POMONA

SACRAMENTO

CBR/bjc

SAN BERNARDINO

Attachment

SAN DIEGO

c: Executive Staff, Office of the Chancellor

SAN FRANCISCO

SAN JOSÉ

SAN LUIS OBISPO

SAN MARCOS

SONOMA

STANISLAUS

THE CALIFORNIA STATE UNIVERSITY
Office of the Chancellor
401 Golden Shore
Long Beach, California 90802-4210
(562) 951-4790

Executive Order: 1062
Effective Date: August 23, 2011
Supersedes: No Prior Executive Order
Title: Field Trip Policy and Procedures

This executive order is issued pursuant to the Standing Orders of the Board of Trustees, Section II (a) and (c). Through adoption of the following statement of policy, the California State University recognizes the beneficial educational purpose of field trips and the necessity for policy and procedures designed to maximize the educational experience, mitigate risk to participants and minimize the university's liability exposure.

I. Purpose

This policy establishes minimum standards for a campus field trip policy and procedures and delegates responsibility for implementation to the campus president.

II. Campus President

The president is delegated the responsibility for the maintenance and oversight of the campus field trip policy, ensure there is a means for future review of the policy, and ensure that it is updated and communicated to faculty and staff at appropriate intervals.

III. Field Trip Defined

A field trip is a university course-related, off-campus activity led by a faculty or staff member and designed to serve educational purposes. A field trip would include the gathering of data for research (such as at a geological or archaeological site), museum visit, participation in a conference or competition, or visits to an event or place of interest. The duration of a field trip may be a class period or longer, and could extend over multiple days. This definition does not apply to activities or placements in the context of a teacher preparation program, intercollegiate sports, or service-learning placements, all of which are governed under separate policy.

IV. Field Trip Policy – Minimum Requirements

The campus field trip policy must include the following minimum requirements:

- Include a means to identify all courses that involve off-campus field trips.
- Require the use of the approved liability waiver. See Executive Order 1051.
- Ensure student emergency contact information is obtained prior to the field trip. The campus must have emergency contact information readily available.
- Provide students with an instructional agenda, health and safety information, emergency procedures, and the student code of conduct, prior to the field trip.
- Require a pre-trip evaluation. This should include a site visit and the written evaluation should be retained by the qualifying department and available for review. The pre-trip location visit can be bypassed if the campus can demonstrate and document sufficient knowledge of the field trip site. This could be accomplished by review online, published materials, or contacting the site to discuss the visit.
- Include a plan to accommodate students with special needs.
- Provide training for any equipment that may be used on the activity.
- Provide for an alternate assignment for students unwilling to accept the risk of participation.
- Comply with the California State University *Use of University and Private Vehicles Policy Guidelines* and the California State University student travel policy, where applicable. See Executive Order 1041.
- Administer regular reviews to monitor and document compliance with the field trip policy and update requirements as necessary at regular intervals.

The campus has the discretion to amend its field trip policy to include components not addressed above.

V. Document Retention

The campus is expected to retain documents related to the field trip consistent with systemwide and campus document retention guidelines. See Executive Order 1031.

It is recommended that the instructional agenda and executed liability waiver be retained together and for a period of one year after the conclusion of the semester/quarter during which the field trip took place. For minors, the documents are to be retained for one year after the minor reaches the age of majority. Electronic copies of the documents are permissible. See technical letter RM 2011-01 and the accompanying *Release of Liability Handbook*.



Charles B. Reed, Chancellor

Date: August 23, 2011

Humboldt State University Field Trip Request Form

All field trip requests must be entered into PeopleSoft at the beginning of each term. For ad hoc field trips (those requested after the beginning of the term) this form must be completed at least three days prior to the date of departure. Plan accordingly.

Directions:

1. Fill in your name, term, course number (CRN), subject, catalog number, section number, number of field trips, first time submission
2. If this is **NOT** the first form you have completed for a given term, please indicate in the appropriate field.
3. Fill in requested information for all planned field trips for the term.
4. Return this completed form to your department coordinator.

Your department coordinator is responsible for generating the field trip requests. Once generated, field trip waiver forms will be created in your students' Student Center. They must "sign" the waiver prior to departing on the field trip(s).

First Name Last Name Number of field trips

Term Class Number Subject Catalog Number Section

Is this the first time you have submitted this form for this term? If no, how many times?

Field Trip 1

Activity

Date(s) and Time(s)

Location(s)

Field Trip 2

Activity

Date(s) and Time(s)

Location(s)

Field Trip 3

Activity

Date(s) and Time(s)

Location(s)

Field Trip 4

Activity

Date(s) and Time(s)

Location(s)

Field Trip 5

Activity

Date(s) and Time(s)

Location(s)

Field Trip 6

Activity

Date(s) and Time(s)

Location(s)

Field Trip 7

Activity

Date(s) and Time(s)

Location(s)

Field Trip 8

Activity

Date(s) and Time(s)

Location(s)

Field Trip 9

Activity

Date(s) and Time(s)

Location(s)

Field Trip 10

Activity

Date(s) and Time(s)

Location(s)

HUMBOLDT STATE UNIVERSITY

Risk Management and Safety Services

Field Trip Transportation Options

Either faculty can arrange for transportation to/from field trip site or it is the responsibility of the student to arrange for transportation to/from field trip site.

HSU responsible for transportation - options:

HSU Bus

Schedule with Facilities Management (*insert link to FM web page regarding reserving buses*)

Rental Vehicles

Reserve vehicle(s) with Enterprise

All drivers need to have a background check (driver records only) (*insert link to HR to order background check*)

All drivers need to be complete a volunteer form

Faculty needs to give clear instructions to the field site location including any special information for that site (parking requirements, speed limits, gate access codes)

Private Vehicles

All drivers need to complete the online defensive driving course (*insert link to CSU SUM*)

All drivers need to have a background check (driver records only)

Faculty can assign students to vehicles

All drivers need to complete a volunteer form

All drivers need to complete Form STD 261 – Authorization to Use Privately Owned Vehicles on State Business

Faculty needs to give clear instructions to the field site location including any special information for that site (parking requirements, speed limits, gate access codes)

Notes

Even though drivers of private vehicles are directed where to drive and have completed volunteer forms, (per California law), if an accident occurs, the policy covering the vehicle pays first before the University insurance is used.

In no case shall the number of passengers, including driver, exceed the number of available seat belts.

The use of vehicles where hazardous road conditions have been declared by California Highway Patrol, or other city, county, state or federal agencies authorized to monitor road conditions is prohibited.

Only HSU students, faculty, staff and volunteers are permitted; children, family members and other “guests” are not permitted as passengers.

HSU not responsible for transportation options

Students can use their own vehicles or carpool.

Faculty gives direction of where and when to meet.

Faculty cannot assign students to vehicles

Faculty can encourage carpooling

Notes

Only HSU students, faculty, staff and volunteers are permitted; children, family members and other “guests” are not permitted to participate in the field trip.