



STUDENT TRAVEL / FIELD TRIP PLANNING CHECKLIST

09/20/2013

This checklist has been developed to assist you in thinking through and planning for student travel risks. This checklist will assist with your written trip plan that will be evaluated by your department, campus risk management and EHSRM. Depending on the complexity of your outing, all or perhaps only a few, of these items will apply and is intended to be used as a guide.

Please contact the Office of Administrative Services for additional resources, forms, advice and assistance in the development process of your outing. Plan review will take two to six weeks for approval depending on the nature of the activity and participants traveling. We recommend that you involve the Office of Administrative Services early in your planning process to ensure that all UA Risk Services requirements are met and a safe, positive learning experience for those participating in your program.

Preliminary Trip Planning Process:

- Pre-trip review of the travel location(s)/destination(s)
- Security – especially for lodging
- Fire safety – especially for lodging
- Theft – probability and prevention
- Assault/rape – probability and prevention
- Medical care – availability and quality
- Transportation – safety and procedures
- Driving risks – vehicle(s), driver(s), passenger(s)
- Vehicle emergency kit
- Weather
- Typically accepted means of payment for goods and services

Logistics for proposed trip

- Dates
- Itinerary
- Estimated number of participants
- Age & gender of participants
- Number & qualifications of leaders needed – including appropriate gender matching & first aid/medical training
- Necessary qualifications for participants (physical, psychological, academic, etc.)
- Costs – total and per person

- Source of funding
- Basic “to-bring” list

Legal/Contractual

- Participant Releases - assumption of risk and waiver forms that adequately advise participants of risks for the trip planned. Obtain release forms from your risk management department.
- Review all contracts, agreements, grants, pertinent to the trip – consult with your risk manager or legal counsel if any indemnification/hold harmless provisions exist

Compliance - Understand and address applicable:

- Federal laws such as ADA, FERPA, OSHA, etc.
- Board of Regents Policy and University Regulation
- Risk Management procedures and guidelines regarding Health, Safety, Security, Insurance, etc.
http://www.alaska.edu/risksafety/h_procedure-guide-library/

Pre-screening criteria and applications for trip participants

- Medical fitness requirements, medical prophylaxis (vaccinations etc.)
- Student fitness for travel (prior disciplinary violations, trouble with drugs and/or alcohol, poor judgment, emotional fitness, maturity level, etc.)
- Consider requiring physician certificate of fitness for travel for high risk/remote travel

Participant withdrawal/cancellation

- Determine how you will handle trip participants who become uncomfortable with their participation and desire to cancel or return home. Consider refund and/or academic credit policies, if applicable. Ensure this information is provided to participants in advance of trip.

Trip information for participants' parents or family members

- Include emergency communications plan.

Trip Preparation Process:

- Applications distributed/collected
- Background checks for trip leaders conducted
- Reservations for travel and lodging made for all trip segments

Communications:

- Determine means of communication, e.g., cell, satellite phone service, etc.

Insurance:

- Determine appropriate coverage needed (trip cancellation insurance, participant coverage, employee insurance, auto, property). See available insurance: http://www.alaska.edu/risksafety/b_insurance/insurance-coverage/

Emergency Services:

- Ensure all participants are familiar with and have information in hand for available emergency services.

Emergency Contacts:

- Identify a 24 hour UA employee contact for emergencies and inform all trip leaders/participants. Define expectations and responsibilities of the contact person(s). Identify how, when, and frequency of contact.

Trip Plan: to be filed with the business office (see sample: <http://www.alaska.edu/risksafety/download/Remote-Travel-Emergency-Plan.pdf>)

- Itinerary copy (all legs of the trip and including transportation and lodging)
- Phone numbers of cells / satellite phones to be used on trip
- Participant names, emergency contact info, and other vital info

Contingency Plans: Discuss with other leaders and participants

- Luggage lost or stolen
- Participant gets lost
- Participant gets injured or ill
- Participant gets arrested
- Participant is kidnapped or held hostage
- Participant dies
- Participant is physically or sexually assaulted
- Participant becomes depressed or suicidal
- Leader becomes incapacitated
- Transportation become unavailable
- Weather conditions deteriorate
- Lodging becomes unusable
- Alternative method to extract group from foreign country, remote locations, etc.
- Brainstorm other possible scenarios for which a contingency plan needs to be developed

Contact List:

- Names, phone numbers and other contact info that may be helpful
- Physicians, Dentists, clinics, and hospitals
- Emergency Services, troopers, police, fire, EMT, etc.
- Legal services
- First aid kit

Purchasing: typically accepted means of payment for goods and services

- ProCard
- Purchase Orders
- Cash / Travel Advances

Accident/Incident Reporting:

- Provide participants direction for reporting

Pre-Departure Orientation:

- **Hazards:**
 - Identify and advise participants of specific locations or activities in the vicinity of your destination that could prove particularly hazardous (crime, topography, etc.). Give instruction on how to reduce risk.

- **Free Time:**
 - Group understanding about protocol for free time, side trips, or other deviations from group activities, what is permitted.
- **Behaviors & Activity Guidelines:**
 - Provide all participants with code of conduct for trip to include list of unacceptable behavior/activities and consequences/disciplinary procedures (include alcohol and drug use).
 - Clearly outline the extent of the university's control over and monitoring of "free-time" activities.
 - Advise process in event participant becomes victim of assault or harassment, either by members of the group or by others.
 - Determine alcohol consumption policy.
- **Health & Medications:**
 - Identify issues with obtaining medications while abroad and/or ensure participants bring enough supply.
 - Identify any restrictive health conditions (asthma, diabetes, allergies, etc.) and determine how to handle them
 - Medical alert bracelets and/or letters from physicians may be helpful for participants with unique medical conditions.
 - Identify whether dietary needs/allergies require special arrangements.
- **Documents:**
 - The following are recommended for all participants/leaders to carry during travel with copies to be left at home
 - Assumption of risk/release agreements
 - Medical information and release forms
 - Government Photo Identification / Passport photocopy
 - Insurance card(s)
 - Biographical info
 - Information Packet for each participant should include:
 - Emergency contacts
 - Destination contacts to include addresses, maps, etc.

Upon Arrival at Destination: Orientation Meeting: Schedule immediately upon arrival at destination(s).

- Discuss local safety issues. Consider arranging a briefing from a local representative (host, security, etc.)
- Review behavior and activity guidelines
- Advise group on communication protocols in an emergency

Upon Return Home:

- Debrief with participants

Evaluate Trip:

- Consider a written evaluation from participants to help improve quality of future trips
- Report on "near misses" and evaluate risks and risk remedies
- Review planning process (what should/could change to make future trips safer and/or a better experience).