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Field Research (Domestic) Planning Time-Table

The Field Research Office has created this planning time table as a guideline to facilitate field research. We want to evolve this template based upon the input and feedback of those researchers who use this planning tool.

The time-line recommended here will vary depending upon how remote your research 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 individual research needs.

6 months prior to departure (at least)

- 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 (e.g. does your field assistant require specific qualifications and how hard will it be to find one) and 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](#).

5 months prior to departure (at least)

- 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.

- Visit the [FRO 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.
 - **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 project
- *with as much detail as is known at this time and which will be revised and expanded over the next months prior to departure.

4 months prior to departure (at least)

- Advertise for hiring any personnel – see [FRO tips on hiring](#)
- 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 website Insurance](#). 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.
- Ensure paperwork has been submitted for permits, permission requirements, licensing, access to lands, animal use or human ethics approval (animal use takes two months to get back). [See FRO's web page on Permissions](#).
- Complete hiring process obtaining names and designations of all participants.
- Identify training required for personnel and book. [See FRO training info](#).
- Contact local officials as necessary and appropriate (ambulance, forestry service personnel, wardens, collaborators, business partners, police) to let them know particulars of your research including the time period and place.
- Secure a receipt book from [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.

2 months prior to departure (at least)

- Confirm your lodging requirements see [FRO's web info on Lodging](#) or email the [Field Research Office](#) for information on available lodging for researchers.
- Identify First Aid Attendants (Standard First Aid or higher depending on hazard rating of the field activity)see [FRO's First Aid Requirements](#).
- Check for First Aid Kits required and order if you don't have enough. Please [see FRO's First Aid Requirements](#) for this information.
- Request [Daily Field Safety Log Books](#) to supplement your Field Activities Plan (for daily tailgate meetings).

- Hand out [Emergency Information Form](#) to all participants in project and ask them to hand in within one week.
- Ensure the trip leader understands the U of A incident/injury reporting requirements. See [EHS Incident/Injury Portal](#) for procedures and forms.

1 month prior to departure (at least)

- 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
- 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 reporting unit](#) within HR Services to find out about WCB coverage and what to do in case of an incident.

3 weeks prior to Departure (at least)

- Review supply list.
- Plan and draft detailed field/project schedule.
- Ensure all equipment is operable and if not, make arrangements to have repaired, if necessary.

2 weeks prior to departure (at least)

- Review FAP to ensure it is complete and revise if necessary.
- Go over FAP in detail with participants.
- Plan for Team Safety Meeting to be held at site and to go over FAP.

1 week prior to departure (at least)

- Finalize your trip description and itinerary. This must be on file with the Dept or Faculty.
- Make sure you have copies of the Daily Field Safety Log Book to take with you to the field.
- 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
- Call and confirm with locals, as necessary, your attendance at site, number of personnel involved in project, and expected research start and end dates.
- Ensure all permits/permissions/access to lands are in place.
- 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 for students who wish to leave early from the research project.
- Stay in contact with your main office in the faculty/department once out in the field.

Post Research

- Complete injury/ incident reports (include near misses)– note that all injuries/incidents must be reported to the Office of Environmental Health and Safety within 24 hours of incident. See [EHS Injury Portal](#).
- Monitor your health for 21 days post-return and if you have any of the following symptoms you should consult with your 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 you received an animal bite, you should consult your health care provider even if you 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.
- 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.