

# Staying Ahead of the Field

## Planning and Managing Student Field Trips

*Presented by  
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# Overview

- Common questions
- “Field trip” definition
- Planning, forms, and procedures
- Transportation
- Other off-campus activities with students
- Resources

# Common Questions

- What is considered a “field trip?”
- What approvals and forms do I need when planning a field trip?
- How far in advance do I need to plan a field trip?
- Can I use a University- or State-owned vehicle to drive students on a field trip?
- Am I permitted to drive students in my personal car on a field trip?
- Can I invite a group of students to my house for a social event?

# What We're Talking About

- A “field trip” is a University-sponsored, course-related, off-campus activity led by a faculty member and designed to serve educational purposes.
  - May include course-related travel to a site to **gather data for research, a museum visit, participation in a conference or competition, or a visit to an event or place of interest;**
  - Duration of a field trip may be a class period or longer and might extend over multiple days;
  - May occur off-campus at any location in the United States.

# What we're NOT talking about ...

- A “field trip” does NOT include student off-campus activities involving:
  - [Education Abroad](#) travel
  - [Venture Program](#) travel (unless part of an academic course)
  - Field placements in the context of a teacher preparation program;
  - Clinical placements (nursing, social work, counseling, etc.);
  - Field work or service learning placements;
  - Intercollegiate sports;
  - Independent study;
  - Internships;
  - Student organization travel;
  - Extracurricular assignments for students to visit specified sites where a student acts independently of a group excursion.

# Field Trip Planning Overview

## [Field Trip Planning Resources](#)

- [Field Trip Planning & Compliance Procedure](#)
- Required Forms:
  - [Field Trip Planning Form](#)
  - [Field Trip Acknowledgement of Risk, Release, and Behavioral Agreement](#)

# FIELD TRIP PLANNING & COMPLIANCE PROCEDURE

## LEGAL TOPICS

Legal Resources & Guidance

Civil Rights and Title IX

▸ Classroom Policies and Practices

Compliance

▸ Contracts

▸ Copyright, Trademark, & Patent Law Resources

Drug-Free Schools and Communities Act & Drug-Free Workplace Act

▸ Employment Guidelines

External Legal Links

▸ Faculty Policy Guidance

▸ FERPA (Family Educational Rights and Privacy Act)

▾ Field Trip Planning

### I. Summary

Field trip planning involves more factors than the simple logistics of where, when, who, and how long. This procedure ensures that some of the less obvious essentials are not neglected as you prepare for your field trip. It specifically addresses the needs to

- Manage risk,
- Consider supplemental accident insurance for participants,
- Collect emergency contact information,
- Obtain release and behavioral agreement, and
- Secure any authorizations that might be needed from post-secondary education regulators in the jurisdictions through which trip participants may pass.

### II. Definition

**Field Trip:** A "field trip" is a University-sponsored course-related, off-campus activity led by a faculty member and designed to serve educational purposes. A field trip may include travel by a faculty member and one or more students to a site to gather data for research, a museum visit, participation in a conference or competition, or a visit to an event or place of interest. The duration of a field trip may be a class period or longer, and might extend over multiple days. A field trip may occur at any off-campus location in the United States.

This definition does **not** apply to student off-campus activities involving education abroad; Venture programs; field placements in the context of a teacher preparation program; clinical placements (nursing, social work, counseling, etc.); service-learning/field work placements; intercollegiate sports; independent study; internships; student organization travel; or extracurricular assignments for students to visit specified sites where a student acts independently of a group excursion.

# Field Trip Planning & Compliance Procedure

Field trip planning involves more factors than the where, when, who, and how long.

The [Field Trip Planning & Compliance Procedure](#) addresses the needs to:

- Manage risk
- Consider supplemental accident insurance for participants
- Collect emergency contact information
- Obtain release and behavioral agreement
- Secure any authorizations that might be needed from post-secondary education regulators in the jurisdictions through which trip participants may pass

# Field Trip Planning & Compliance Procedure

## Step 1 - Complete the [Field Trip Planning Form](#)

- Should take 15 minutes or less to complete
- Collects information needed for the University to administratively support the field trip
- Identifies potential regulatory issues that must be addressed
- Notifies appropriate campus offices so they can provide support for insurance, risk management, and compliance purposes

# Field Trip Planning & Compliance Procedure

## Basic information

- Field trip purpose, employee involvement, within NC or out-of-state
- College, department, or unit sponsoring
- Primary Trip Leader information
- Departure and return dates (for insurance and compliance purposes)
- States or territories visited
- Connected course
- Number of students, employees, others

# Field Trip Planning & Compliance Procedure

## Insurance

- Risk Management & Insurance can purchase very affordable accident insurance
- Provides medical benefits (up to \$5,000 per Insured) to participants and chaperones for injuries sustained while on a UNC Charlotte-sponsored trip
- Cost depends on number of days
- Purchase is optional and requires input of fund number

# Field Trip Planning & Compliance Procedure

## State Authorization Compliance

- All states regulate post-secondary education within their borders
- For field trips sponsored by out-of-state institutions *in some states* “**multi-night residency**” = “**physical presence**” and may be subject to regulatory requirements
- [University Policy 210, Out of State Academic Activity](#) provides that these requirements be met prior to any out-of-state academic activity
- [Out-of-State Academic Activity Coordinating Council \(OoSAACC\)](#) will assist in obtaining any necessary out-of-state authorizations

# Field Trip Planning & Compliance Procedure

## Confirmation

- After submitting, you will receive “Field Trip Planning Form Receipt” email, including copies of your responses
- If applicable, you will receive state authorization confirmation or follow-up information from OoSAACC

# Field Trip Planning & Compliance Procedure

**Step 2** - Distribute the [Field Trip Acknowledgement of Risk, Release, and Behavioral Agreement](#) to all field trip participants

- If you need to modify the [Agreement](#) to suit the field trip, [contact Legal Affairs](#).
- *IMPORTANT: Agreement must be signed voluntarily. If a participant is unwilling to sign the agreement, they cannot participate. If the field trip is for credit or is a required element of the course, offer alternative projects or activities.*

**UNC Charlotte**  
**Field Trip Acknowledgement of Risk, Release, and Behavioral Agreement**

*NOTE: Field trip leader(s) should bring a signed copy of this form when traveling with the student for emergency contact purposes.*

**Section 1 (To be completed by field trip leader)**

**Class:** \_\_\_\_\_ **Field Trip Date(s):** \_\_\_\_\_

**Field Trip Leader:** \_\_\_\_\_ **Cell Phone:** \_\_\_\_\_

**Field Trip Leader Email:** \_\_\_\_\_

**Field Trip Location(s):** \_\_\_\_\_

**Equipment/supplies to be provided:**

- **By participant:** \_\_\_\_\_
- **By field trip leader:** \_\_\_\_\_

**Immunizations required, if any:** \_\_\_\_\_

**Physical activities to be undertaken include:** \_\_\_\_\_

**Risks inherent in this field trip include physical or psychological injury due to:** \_\_\_\_\_

**Alternative project or activity available for credit (if acknowledgment/consent not given):** \_\_\_\_\_

# Field Trip Acknowledgement of Risk, Release, & Behavioral Agreement

# Field Trip Acknowledgement of Risk, Release, & Behavioral Agreement

- Faculty Role
  - Useful planning tool
  - Discuss potential risks, precautions, responsibilities with students in advance
  - Be as specific as possible about physical activities & inherent risks
- Part 1: Student Acknowledgement of Risk & Release
  - Acknowledgement of inherent risks
  - Representation of ability to participate
  - Consent for treatment for accident or illness
  - Acknowledgement of financial responsibility for medical bills
  - Emergency contact information
  - Disability accommodations information

# Field Trip Acknowledgement of Risk, Release, & Behavioral Agreement

- Part 2: Student Behavioral Agreement
  - University conduct policies apply
  - Responsible and mature behavior
  - No alcohol use
  - Full participation expected
  - Field trip leader's authority to remove for violation of the Agreement
  - Responsibility for nonrefundable costs incurred if unable to attend
  - Consent to notify emergency contact for medical attention
  - Abide by expectations specific to the field trip

# Field Trip Planning & Compliance Procedure

**Step 3** - Collect signed [Field Trip Acknowledgement of Risk, Release, and Behavioral Agreement](#) from each student

- Acceptable electronic signatures\*
  - [DocuSign](#), or
  - Marks, initials, or checkboxes provided through an online form that is accessible only after inputting one's NinerNet credentials and is tied to that individual's NinerNet account

- Keep all signed agreements on file for 5 years

\* See [Guidelines for Accepting Digital or Electronic Signatures](#)

# Field Trip Planning & Compliance Procedure

**Step 4** – Maintain roster of all participants

**Step 5** – Receive confirmation from OoSAAC representative that all required regulatory authorizations have been obtained, if applicable

- This confirmation will either be issued after the [Field Trip Planning Form](#) is completed or sent later by a member of the Out-of-State Academic Activity Coordinating Council (OoSAACC) (see [University Policy 210, Out-of-State Academic Activity](#)) once the authorizations have been obtained.

**Step 6** – Have a great trip!

# Driving Students on Field Trips

*Can I drive students on a field trip in my **personal car**?*

- **Yes, but** ... not recommended
  - Be aware of personal liability
  - Your auto and liability insurance is primary; you pay deductible
  - State auto liability coverage may supplement (after personal coverage exhausted)
  - Your own injuries may be covered by Worker's Compensation (if within course and scope of employment)
  - Report accidents to local police immediately and to Risk Management & Insurance (704-687-5711) by noon the following business day

# Driving Students on Field Trips

*Can I drive students on a field trip in a **University- or State-owned vehicle**?*

- Yes, but...
  - Only UNC Charlotte faculty, staff, or student employees (on payroll) may drive
  - Must undergo [Vehicle Safety Training](#)
  - For 15-passenger vans, must pass the University's 15 passenger van training, located [here](#)
  - Driver responsible for vehicle and passengers at all times
  - Driver must have a valid, current driver's license
  - Driver must adhere to any driver's license restrictions
  - Review [University Policy 604.2, State-Owned Vehicles](#)

# Off-Campus Social Activities with Students

*Can I invite a group of students to my house for a social event?*

- Yes, but be aware of:
  - Personal liability (no University insurance coverage)
  - Be clear that it's not University-sponsored
  - Potential sexual harassment/misconduct claims
  - Prohibited amorous relationships (see [University Policy 101.3, Amorous Relationships between Students and Faculty Members or Other University Employees](#))
  - Alcohol and minors (see [University Policy 706, Alcoholic Beverages](#) and [University Policy 716, Minors on Campus](#))
  - Social host liability (negligence) -- Social host may be liable for property damage/personal injury if:
    - Host served alcohol to a person;
    - Host knew or should have known person was intoxicated; and
    - Host knew or should have known person would be driving

# Resources

- [Field Trip Planning Resources](#) (from Legal Affairs)
- [Field Trip Planning & Compliance Procedure](#)
  - [Field Trip Planning Form](#)
  - [Field Trip Acknowledgement of Risk, Release, and Behavioral Agreement](#)

# Contacts

- **Office of Legal Affairs**
  - Amy Kelso, Senior Associate General Counsel
  - [amy.kelso@charlotte.edu](mailto:amy.kelso@charlotte.edu)
- **Risk Management & Insurance**
  - Joe Fiorelli, Director of Risk Management & Insurance
  - [jfiorel3@charlotte.edu](mailto:jfiorel3@charlotte.edu)
- **Out-of-State Academic Activity Coordinating Council (OoSAACC)**
  - Steven Carter, State Authorization Manager/SARA Liaison
  - [stateauthDE@charlotte.edu](mailto:stateauthDE@charlotte.edu)