Department of Zoology

Field Safety Policy and Procedures

Introduction

The Department of Zoology Field Safety Policy applies to all faculty, staff and students who are involved in off-campus field activities related to research or teaching. The Departmental Field Safety Policy is in addition to the UBC Travel and Field Safety Policies and Procedures (https://travelfieldsafety.ubc.ca/about/) with which all individuals engaged in field studies must familiarize themselves.

Scope

Members of the Department of Zoology collect samples/data off-campus in many ways. These range from, but are not limited to:
- visiting the laboratories of colleagues outside UBC
- working at field stations and marine labs
- making observations or collecting samples in regional parks or at other established local sites
- making spontaneous road-side stops to observe or sample chance events
- conducting research observation/studies at established field sites
- conducting organized research trips to remote locations

The requirements for ensuring proper safety vary in each instance.

Procedures

Established Laboratories, Field Stations and Marine Labs:
In the case of visits to laboratories and field stations with their own existing policies, researchers must comply with local regulations in addition to UBC safety guidelines.

Observations/Sampling at "Field Friendly" Sites
When the research and environment are such that the risk of any threat to safety is low, field safety requirements and training are at the discretion of the instructor/research supervisor. These may range from no requirement, to a call-in procedure to track the safe return of individuals from excursions, to some of the more formal procedures detailed in the next section. The designation of a site as 'field friendly' is at the discretion of the principal investigator.

Research Trips to Remote Locations
In cases where individuals are travelling to sites where safety precautions are required to mitigate the consequences of any accident, the "person-in-charge" of the field activity (normally a faculty member or his/her delegate) must complete a Field Research Safety Plan prior to undertaking off-campus field activity (ideally two weeks in advance of the date that the field work begins). Participants (e.g. students) in field studies or field work are similarly required to complete safety-related forms.

For ease of use, the safety-related documents that compose a Field Research Safety Plan are available on the departmental website and access is by request only. For instruction to request access, please read the Safe Work Procedures (https://www.zoology.ubc.ca/resources/safety/safety-forms-and-labels/field-research-safety-webforms):

Department of Zoology Field Research Safety Webform – Project/Trip Leader
Department of Zoology Field Research Safety Webform – Participant

These webforms are to be completed and submitted online to the Zoology Department.

Students and Faculty take part in two, distinctly different types of fieldwork that fall under this category.

1. Official graduate and undergraduate field courses, plus various weekend and other trips that are tightly-structured and planned. Departmental approval prior to departure is required for these.

2. Research fieldwork that usually involves a small number of people, and commonly involves a much less tightly constrained schedule. Fieldwork may take place in areas where potential hazards are much greater. Although research leaders take practical responsibility for these activities.

It is appropriate to develop safety plans for both types of field activity that are tailored specifically to that activity. If there are regular trips with the same people to the same area, the process may be streamlined with a "standing approval", but ultimately it is required that the Department holds records of each off-campus field trip of this nature before departure.

Responsibility

Ultimately the responsibility for safe practice lies with the individuals directly involved in the research. It is the responsibility of the department head to ensure that all members of the department involved in field research comply with this policy. All necessary documentation must be submitted to the department head (or their delegate) prior to undertaking off-campus field activity. This documentation will be maintained in a secure location. The Departmental Chair may delegate this responsibility.

Field Safety Plan Documentation

Each trip leader (who is in effect, the Field Safety Officer for that particular trip), will submit a Field Safety Plan that is specific to each field trip. The necessary documentation will vary as a function of the nature and location of the research. The following webforms are provided for convenience. They indicate key elements of safety planning that should be considered.

1. **Department of Zoology Field Research Safety Webform – Project/Trip Leader:** this webform consists of 4 parts:
   Part 1. Planning Record – Basic information listing who, where, when, etc.

Part 2. Communication Plan – Phone numbers for leaders' emergency contacts (procedure for contacting local authorities or police as well as the Department in case of emergency). The plan should also outline avenues of communication between members of the group if necessary.

Part 3. Assessment of Risk – An assessment of known and potential risks and appropriate safety measures. The form contains a fairly comprehensive check-list of potential hazards/risks to serve as a guide.

Part 4. Emergency Response Plan – A plan for dealing with any emergency that might arise (e.g. Location, address, phone number, and means of access to the hospital nearest to each field site. If road transportation is not available, another method of transport must be identified and phone numbers for local air and water transportation companies must be provided.)

2. **Department of Zoology Field Research Safety Webform – Participant:** each individual participating in the field research should file this form that includes:

Part 1. Critical Data – A secure method of holding confidential details of a field trip participant such as their emergency contact person, health insurance, and any medical information that could be important to a doctor administering emergency treatment (e.g. drug sensitivities, allergies, regular medication).

Part 2. Acknowledgment of Risk Form – Each participant is informed of the potential risks and of the physical requirements of the fieldwork. Each participant must acknowledge receipt of the information and agree to participate in the activity by signing this document.

It is required that all fields on all of the documentation are filled out accurately. If a form is not applicable to the fieldtrip, then this must be made clear on the respective document.

Note: Individuals listed as emergency contacts on these forms should be readily available via phone and either in a position to make critical medical decisions, or able to quickly contact someone who can!

Note: The term 'internal contact' is the field team leader or responsible person on site. The 'external contact' is someone not in the field but in a position of authority.

Undergraduate, and Graduate Course Fieldtrips

Responsibilities of the course instructor/trip leader

It is the responsibility of the course instructor to submit all of the required documentation to the department chair prior to the departure of any trip. Course instructors should submit a **risk assessment form**, a **communication plan**, an **emergency response plan**, **critical data forms**

and the **acknowledgment of risk** forms as appropriate for the trip. The leader will ensure that each participant has filed a **critical data form** and signed an **acknowledgment of risk form**. It is required that all fields on all of the documentation are filled out accurately. If a form is not applicable to the fieldtrip, then this must be made clear on the respective document. A **trip leader** should be designated for every team going into the field. This creates clear roles in the event that an emergency does occur. Trip leaders are responsible for ensuring that all safety procedures are adhered to during the field research. This includes following the communication plan, and ensuring all personnel on the trip follow the safety procedures. Trip leaders are also required to ensure all necessary safety equipment and an adequate first aid kit are available for the duration of the trip. A list of recommended first aid supplies can be found at: https://travelfieldsafety.ubc.ca/firstaid/.

Responsibilities of Teaching Assistants

It is the responsibility of the teaching assistants to adhere strictly to the safety procedures and to set an example for course participants. Teaching assistants therefore must know and understand these procedures prior to going on the trip. Teaching assistants are also required to fill out a **critical data form** and **acknowledgment of risk form**.

Responsibilities of the course participants

Course participants must ensure they are properly trained on the safety policies and procedures before going into the field. It is the responsibility of all participants to review these policies and procedures in addition to completing and understanding the specific field training from their primary investigator. All personnel must fill out a **critical data form** and **acknowledgment of risk** form accurately.

Field Safety Training

A general safety lecture to all participants should be given prior to trip departure. All participants should be made aware of the Safety Policy document and a review of the forms to be completed by participants should be part of the lecture. Immediately prior to commencing work in the field the person-in-charge should review with participants, where appropriate, any safety themes relevant to the circumstances of the particular field activity about to be undertaken.

Research Fieldwork

Responsibilities of the primary investigator/trip leader

It is the responsibility of the primary investigator/trip leader to have knowledge of all hazards they and other participants could reasonably be exposed to during the research field activity. They must submit a Field Research Safety Plan prior to undertaking off-campus field activity. Principle Investigators should submit a **risk assessment form**, a **communication plan**, an **emergency response plan**, **critical data forms** and the **acknowledgment of risk** forms as is appropriate for the trip. Each individual participating in the field course should file a **critical data form** and **acknowledgment of risk form**. It is required that all fields on all of the

documentation are filled out accurately. If a form is not applicable to the fieldtrip, then this must be made clear on the respective document. A **trip leader** should be designated for every team going into the field. This creates clear roles in the event that an emergency does occur. Trip leaders are responsible for ensuring that all safety procedures are adhered to during the field research. This includes following the communication plan, and ensuring all personnel on the trip follows the safety procedures. All team members should already have completed the field training they require to operate safely in the field (eg. Industrial First Aid, Bear Awareness Training, Firearms Safety). When in the field the team leader is responsible for checking in according to the communication plan and emergency response plan. Trip leaders are also required to ensure an adequate first aid kit is available for the duration of the trip. A list of recommended first aid supplies can be found here: https://travelfieldsafety.ubc.ca/firstaid/.

Responsibilities of field team members

Field team members must ensure they are properly trained on the safety policies and procedures before going into the field. It is the responsibility of all personnel to review these policies and procedures in addition to completing and understanding the specific field training from their primary investigator. All personnel must fill out the **Department of Zoology Field Research Safety Webform – Participant,** that includes **critical data** and **acknowledgment of risk,** accurately.

Field Safety Training

It is the responsibility of the primary investigator to ensure that all personnel have proper field safety training before any field research trip. The appropriate field safety training should cater to each specific trip and the content of the safety training is at the discretion of the primary investigator. Completion of specific field safety training should be indicated on the **critical data form** for each individual participating in the field research. The primary investigator is also responsible for making their students aware of the field safety policies of the UBC Department of Zoology.

General Precautions

1) **Never work alone under hazardous conditions.** This is Departmental Policy. Your field partner is your best insurance policy. If a field partner is not a UBC student or employee, they must still fill out the **Department of Zoology Field Research Safety Webform – Participant,** that includes **critical data** and **acknowledgment of risk,** accurately, and must receive training for the role they will play in the field. They will also sign the **Release of liability, waiver of claims, acknowledgment of risk form** as a volunteer.

Principle Investigators may approve of individuals going into the field alone under conditions deemed to be non-hazardous. However, if individuals are working alone, they should ensure that someone is aware of where they are working and that at the end of the task, they contact them to check in.

2) In the case of fieldwork in remote areas where there is limited access to medical support, one person should have up-to-date certification in first aid and CPR, and an appropriate first-aid kit needs to be available. All participants should also carry small first-aid kits with them in the field each day.

3) In the case of fieldwork in remote areas where there is the possibility of getting lost, provision should be made for providing a communication link to a central station. In some field areas a cell phone is sufficient; elsewhere use of a satellite phone may be the best alternative. Also consider issuing short-wavelength radios for local communication between groups in the field, if more than one. Also consider issuing flares for aid in location if lost and carrying them each day in the field.

4) In the case of fieldwork in remote areas where there is the potential for interactions with dangerous wildlife, consider supplying appropriate wildlife deterrents (e.g., bear spray, bear bangers etc.) and firearms, if necessary, and the relevant training and certification.

Specific Precautions

Each field area will have its own suite of specific hazards, and it is the responsibility of the research supervisor to identify these hazards in the Field Safety Plan and at the Field Safety Training. The range of potential hazards that may be encountered in the field could include:

a) Local diseases (especially in the tropics).

b) Severe weather hazards, (heatstroke, hypothermia, lightning strike, etc.) and risk of attack by wild animals (bears, snakes, etc.).

c) Legal risks such as photographing restricted installations such as airports, military bases, power plants, etc. in certain countries. This also includes restrictions on medications that are legal in Canada but not in other countries.

d) Crime risks such as theft, kidnapping, car hijacking, etc.; civil insurrection.

e) Health risks such as unavailability of necessary prescription medications in certain countries.

f) Poor communications and infrastructure (bad roads, scarce fuel, no telephone service, etc.).

Research Fieldwork or **Course Fieldtrips Abroad**

All members of field trips going abroad should familiarize themselves with UBC Travel Advice and Advisories (http://www.hr.ubc.ca/wellbeing-benefits/benefits/details/travel/travel-advisories/)

UBC is a member of International SOS (https://www.internationalsos.com/), a medical and security support service. If you run into any problems while you're traveling internationally you can contact them for support. UBC's membership number is 27AYCA486500 and the dedicated phone line at International SOS is (215) 942-8478. To login and access the International SOS Membership card, (https://www.internationalsos.com/member-zone). Download their Assistance App (https://www.internationalsos.com/assistance-app) for security and medical alerts and assistance while traveling.

UBC also provides a number of other resources for international travel including:

UBC Travel Planning Tool (http://travelplan.ubc.ca/)

See Student Safety Abroad Policy and planning tool document in Field Research Safety Webform page (https://www.zoology.ubc.ca/resources/safety/safety-forms-and-labels/field-research-safety-webforms