

CSULB Academic Course Field Trips Checklist

This checklist is designed to help simplify the procedures required for academic course field trips and to make information and forms easily accessible. Please visit the [Frequently Asked Questions](#) to determine if your course activity requires use of this checklist.

Faculty Planning and Approval Process:

- Submit written pre-trip evaluation to Department Chair, to include:
 - ✓ Site visit (can bypass if sufficient knowledge of field trip can be demonstrated and documented).
 - ✓ Evaluation of site suitability.
 - ✓ Consultation with the Office of Disabled Student Services, as needed.
 - ✓ [CSULB Field Trip Site Risk Assessment Checklist](#)
- If approved, Department Chair forwards to College Dean for approval. Keep copies of approved documentation in the college and department offices.

Provide students and other participants with:

- Instructional schedule for fieldtrip.
- Alternate assignment for only those students unwilling to accept the risk of participation or those physically unable to participate. Consult with the Office of Disabled Student Services, if necessary.
- International travel information, if applicable. For information or assistance, contact the Education Abroad Office in the Center for International Education.
- Documented training for any specialized equipment that will be used during the field trip.
- Health and safety information and emergency procedures specific to field trip.
- [Student Code of Conduct](#)
- [Field Trip Forms that include:](#)
 - ✓ Release of Liability form
 - ✓ Voluntary Medical Disclosure and Assumption of Risk Statement

Collect from students and other participants:

- Information for the [Travel Participant List](#). Take this list with you on the field trip and retain a copy in the department office.
- Release of Liability forms. Retain in department office.
- Voluntary Medical Disclosure and Assumption of Risk Statements from only those participants who wish to disclose information. Take forms with you on the field trip. Forward the form to Risk Management for any student involved in a medical emergency during the field trip. Destroy all other Voluntary Medical Disclosure and Assumption of Risk Statements at the end of the field trip.

Travel:

- Complete [Travel Request](#) prior to fieldtrip. Follow appropriate college-specific approval process.
- For international travel, attach a copy of the Travel Participant List to Travel Request form. The college and division office will route to Risk Management to secure appropriate international travel insurance (FTLIP).
- A purchase order is now required for third party accommodations, locations and transportation services. Contracts for bus-ground transportation must go through Purchasing to ensure compliance with the CSU insurance requirement that bus companies carry a minimum \$5 million combined single limit/business automobile liability. Contact Purchasing at extension 5-4296 for a list of eligible carriers.
- Complete a [Travel Expense Claim](#), if applicable, at the end of the Field Trip.

Review and Record Retention:

- Create and maintain a list of all courses with approved fieldtrips, to be made accessible at the department and college level, together with all related documentation.
- Review all course field trip documentation annually. A new risk assessment must be completed if changes have occurred.
- Retain e-documents or hard copies of the following forms for 3 years in department office:
 - ✓ Travel Participant List
 - ✓ Release of Liability (a paper copy must be kept for any participant under 18 years old)