

Adopted: June 4 2013

**ACADEMIC SENATE  
of  
CALIFORNIA POLYTECHNIC STATE UNIVERSITY  
San Luis Obispo, CA**

**AS-767-13**

**RESOLUTION ON CAL POLY FIELD TRIP POLICY**

- 1 WHEREAS, CSU Executive Order 1062 sets the minimum requirements for field trips and requires  
2 each CSU campus to develop an appropriate field trip policy; therefore be it  
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4 RESOLVED: That the Academic Senate approve the attached Cal Poly Field Trip Policy, and be it  
5 further  
6  
7 RESOLVED: That the Academic Senate charge the Instruction Committee to review this policy and its  
8 implementation within one year; and be it further  
9  
10 RESOLVED: That the requirements of the Field Trip Policy and all appropriate forms be available on  
11 one website hosted by Risk Management.

Proposed by: Academic Senate Instruction Committee  
Date: April 26 2013  
Revised: June 4 2013

California Polytechnic State University, San Luis Obispo  
Field Trip Policy

*In response to California State University Executive Order 1062 (effective August 23, 2011) Cal Poly will follow the following policy on field trips. As part of Cal Poly's "learn by doing" philosophy, field trips are a significant part of students' learning experience.*

1. Definition of a Field Trip

A field trip is a university course-related, off-campus activity led by a faculty or staff member and designed to serve educational purposes. A field trip would include the gathering of data for research (such as at a geological or archaeological site), museum visit, participation in a conference or competition, or visits to an event or place of interest. The duration of a field trip may be a class period or longer, and could extend over multiple days.

2. Scope of this Policy

This policy does not apply to activities or placements in the context of a teacher preparation program, intercollegiate sports, or service-learning placements, all of which are governed under separate policy.

3. Definition of a Field Trip Leader

The leader is the class instructor or other university faculty or staff member designated by the instructor who has overall responsibility for the development and implementation of the field trip. Some leadership responsibilities may also be given to chaperones, university faculty or staff members who accompany the students on the field trip. Teaching assistants are not appropriate field trip leaders but may serve as chaperones.

4. Responsibilities of a Field Trip Leader

- a. Conduct a pre-trip evaluation using the Pre-Trip Evaluation Worksheet (available at <http://afd.calpoly.edu/cprm/fieldtrips.asp#forms>) and submit the worksheet to the department. This may require a site visit, which can be omitted if the field trip leader can demonstrate and document sufficient knowledge of the field trip site. This could be accomplished by reviewing online, examining published materials, or contacting the site to discuss the visit.
- b. Complete the leader portion of the University Field Activities Notification and distribute to students, preferably on the first day of class but definitely before the start of the field trip (available at <http://www.afd.calpoly.edu/cprm/fieldtrips.asp#forms>).

- c. Ensure that students initial and sign the student portion of the University Field Activities Notification, preferably on the first day of class but definitely before the start of the field trip. If a student refuses to sign the form, print his/her name on the form, indicate in the signature area that he/she received a copy, and date the form.
- d. Ensure that students sign Release of Liability, Promise Not to Sue, Assumption of Risk and Agreement to Pay Claims form (available at <http://www.afd.calpoly.edu/cprm/fieldtrips.asp#forms>). The Release of Liability and Field Activities Notification are part of the same document.
- e. Submit copies of all required forms (4a-4d) to the department/college, if the field trip is domestic, or the International Center, if the trip is international.
- f. Provide a plan to accommodate any students with special needs. For assistance, contact the Disability Resource Center (<http://drc.calpoly.edu>).
- g. Provide training for any equipment that may be used.
- h. Provide an alternate assignment for students unwilling to accept the risk of participation for "serious and compelling" reasons (for defined reasons, see <http://www.academicssenate.calpoly.edu/sites/academicssenate/files/Resolutions/1980-1981/AS-103-80-IC.pdf>). Note: In a major where the field trip is a part of the degree requirements, this provision applies to the specific field trip but not the degree requirement. In practice this means that a student may opt out of a field trip to one site, but the student must complete the requirement by participating in another field trip either at another site or time, if required by the program.
- i. Comply with the CSU *Use of University and Private Vehicles Policy Guidelines*. See Administration and Finance, "Driver Safety & Training" (<http://afd.calpoly.edu/ehs/driversafety.asp>). For additional information, see [https://www.calstate.edu/risk\\_management/documents/VehicleUseGuideBook.pdf](https://www.calstate.edu/risk_management/documents/VehicleUseGuideBook.pdf).
- j. Take roll at the beginning and end of the field trip; attach the roll sheet to the Travel Request Form 1A at the completion of the trip. Students leaving during the field trip should sign out on the Field Activities Sign Out Release Agreement; attach the agreement to the Travel Request.
- k. For International field trips, comply with the International Center's International Travel Approval Process (<http://www.international.calpoly.edu/travel/index.html>).
- l. Arrange all chartered air or bus travel through AFD Contracts and Procurement.

5. Responsibilities of the Department

- a. Provide the Registrar with a department list of current courses that require or may require field trips.
- b. Ensure that the Cal Poly Catalog and all Course Proposal and Modification forms specify whether major courses require or may require field trips.
- c. Evaluate risk using the completed Pre-Trip Evaluation Worksheet.
- d. Ensure leader compliance with this field trip policy.
- e. If not the college's or International Center's responsibility, retain all required documents (4a-4d and 4o) for three years after the end of the academic year in which the field trip takes place. Electronic copies are permissible.

6. Responsibilities of the College

- a. Evaluate risk using the completed Pre-Trip Evaluation Worksheet.
- b. If not the department's or International Center's responsibility, retain all required documents (4a-d and 4o) for three years after the end of the academic year in which the field trip takes place. Electronic copies are permissible.
- c. Ensure department compliance with this field trip policy.

7. Responsibilities of the Registrar

- a. Indicate which courses require or may require field trips in the catalog.
- b. Update Course Proposal and Modification forms to identify which courses require or may require field trips.

8. Responsibilities of AFD Contracts and Procurement

- a. Maintain up-to-date information on the risk management website.
- b. Comply with applicable provisions of the EO 1041 CSU Student Travel Policy (<http://www.calstate.edu/eo/EO-1041.html>) if applicable. The policy requires minimum insurance for chartered air or bus travel. The policy also specifies the type of written notice that must be provided to all students and the release, hold harmless, and informed consent provisions that all students must approve in writing.

9. Responsibilities of Academic Programs

- a. Administer regular reviews to monitor and document compliance with this field trip policy; update requirements as necessary at regular intervals.

State of California  
**Memorandum**

**CAL POLY**  
SAN LUIS OBISPO

**To:** Steven Rein  
Chair, Academic Senate

**Date:** July 11, 2013

**From:** Jeffrey D. Armstrong  
President



**E-Copies:** K. Enz Finken, K. Humphrey,  
S. Nosek, D. Read, P. Bailey,  
D. Cerf, D. Larson,  
C. Theodoropoulos, and  
A. Thulin

**Subject:** Response to Academic Senate Resolution AS-767-13  
Resolution on Cal Poly Field Trip Policy

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This memo formally acknowledges receipt and approval of the above-entitled Academic Senate resolution. By copy of this memorandum, I am directing the Provost, Vice Presidents, and the Deans to share the resolution and this approval with their staff to ensure knowledge of, and compliance with, the requirements of the Cal Poly Field Trip Policy.

Please express my appreciation to the members of the Academic Senate Instruction Committee for their attention to this important policy matter.