

Best Practices for Field-based Education Logistics and Safety Checklist¹

Site

- Site(s) scouted prior to event, stopping points clearly identified/marked
- Accessible to anticipated participants (handicap considerations as needed for travel and stops)
- Support educational objectives
- Site hazards identified (participants and assistants briefed in advance)
- Site conditions provide safe environment
- Contingency plan for weather/access restrictions
- Permissions for site access obtained/documentated
- Parking for appropriate number and kind of vehicles planned and organized in advance

Travel

- Travel route scouted (marked with flagging, paint, signs if necessary)
- Travel time under event conditions accurately estimated
- Maps with routes identified, prepared and distributed; written directions and/or GPS coordinates as appropriate
- Vehicles equipped with functioning GPS (tested in advance)
- Travel route negotiable at event's time of year (weather, road conditions, water crossings/conditions)
- Travel route landowners confirm access will be allowed (no closures, arrangements for access confirmed, keys for locked gates)
- Special vehicle requirements identified (4-wheel drive or high clearance, watercraft, aircraft) as needed
- Vehicles procured, or arranged with students
- Training for drivers of vans completed/passed/validated
- Vehicles fueled and ready, with contingency fuel
- If travelling by convoy, drivers understand plan for negotiating stop signals, road construction (how to keep group together, lights on in convoy, communication between vehicles established)
- Initial meeting/parking location identified, permissions obtained
- On-site parking identified, capacity denoted, safe ingress and egress established
- "Chief of Party" established, responsibilities clear

¹ Author: John W Punches, Associate Professor, Department of Forest Engineering, Research and Management. Union County Extension Office. 10507 N McAllister Rd, Room 9, La Grande, Oregon, USA. 541-963-1061. John.punches@oregonstate.edu



Wildfire

- Fire season identified/considered
- Vehicles equipped with fire tools (Pulaski, shovel, bucket, etc.), as needed
- Personnel trained in fire suppression, as needed
- Fire restrictions noted, mapped, communicated, as needed

Communications

- Communications methods identified (tested at site and along travel route)
 - Cell phones
 - Satellite phones
 - Two-way radios (consistent make and model; programmed for local needs)
 - Emergency beacons
- Communication plan (between vehicles; to “base”, emergency responders, agency personnel)
- Participants informed of meeting place/date/time, what terrain conditions and physical efforts to expect, personal responsibilities for equipment/food/fluids, anticipated return time, emergency contact process should family members need to reach them
- Promotional materials ask interested participants to notify program contact of special needs (disability accommodations, dietary restrictions, etc.)

Medical

- Medical plan in place (emergency contacts identified, evacuation procedures/locations known and briefed)
- Personnel have appropriate emergency medical training, participants informed
- Medical kits in vehicles and field (key personnel trained in use)
- AED in vehicle (key personnel trained in use)
- Prepared for stinging insects/plants (medications may require advance authorization from medical authority)
- Stinging insect spray available
- Participant preexisting medical conditions identified
- Participants reminded to bring personal medications/medical devices

Personal Needs

- Meals provided, or participant responsibility (notified)
- Snacks provided, or participant responsibility (notified)
- Participant dietary restrictions known and considered
- Fluids provided, or participant responsibility (notified)
- Bathroom facilities identified/provided
 - Bathroom stops during transit
 - Portable bathrooms
 - Field improvised toilets (pit, lined bucket, privacy screen)
 - Toilet paper, hand sanitizer



Personal Equipment

- Clothing/footwear appropriate for field conditions
- Weather gear (rain, cold, heat)
- Gloves (type appropriate for work and weather)
- Hardhat/helmet
- Ear/eye protection
- Sunscreen/sunglasses
- High visibility clothing/vest
- Other personal protective equipment (PPE)

Event Equipment

- Equipment list prepared
- Equipment obtained, prepared, tested
- Equipment transportation arranged (protect equipment, protect persons) – dedicated transport for equipment
- Equipment on site
- Extra equipment and/or repair options available
- Emergency vehicle kits available (tow straps, jumper cables, flares, etc.)

Personnel

- Instructor/Lead/Chief of Party trained/prepared/practiced
- Assistants briefed on lesson/communication/safety protocols, prepared and practiced for assignment, committed to lesson timeline
- Drivers briefed on travel/communication/safety protocols
- Personnel accountability system in place (no one left behind – everyone accounted for)

Risk Mitigation

- Participant (instructors and students) risks and hazards identified and communicated
- Insurance obtained/verified
- Liability waivers reviewed and signed
- Safety briefing(s) delivered

