

UNIVERSITY OF CALGARY | VP SERVICES | Environment, Health and Safety

Field Safety Standard

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1. ACRONYMS

Acronym	
AB OHS	Alberta Occupational Health and Safety Act, Regulation and Code
ATV	All Terrain Vehicle
BSDS	Biological Safety Data Sheet
CS	Campus Security
EHS	Environment, Health and Safety
Employee	Means, an individual who is a worker as defined under the Act and includes both University employees and non-employees such as Students, Volunteers, or Appointees who are performing work on behalf of the University.
ERP	Emergency Response Plan
FLHA	Field Level Hazard Assessment
GPS	Global Positioning System
HR	Human Resources
Isolated Location	Means: (a) a site that is location over 350km from the nearest population centre with conventional services and year-round road access; (b) a settlement that has regular air service and reliable telephone service but no year-round road access; (c) for the purpose of determining first aid requirements, an Indigenous, Inuit or Métis settlement where conventional services may not be reliable or available.
OARS	Online Accident Reporting System
Participant	Any student, employee, volunteer, etc. (regardless of level of authority), who participates in field research or field school related travel and or activities.
PI	Principle Investigator
PSDS	Pathogen Safety Data Sheet
Remote Location	Means: (a) a site that is 80km or more from a settlement or community with a population of 1,000 or more; (b) that lacks transportation and communication links that are typical in more populated areas; (c) may be located on grazing and ranch lands.
RMI	Risk Management and Insurance
SCM	Supply Chain Management
SDS	Safety Data Sheet
Student	an individual who is participating in a field activity as part of a university course or program of study in which they are registered.
Supervisor	Means an individual who directs or oversees a person or group of employees or students during field research or field school related travel and or activities.
SW	Staff Wellness
TDG	Transportation of Dangerous Goods
Team Leader	Any participant who has been assigned the role by the trip supervisor and has been provided with the authority to initiate emergency response plans or escalate a concern.
Urban Area	Means an incorporated city, town, or village.
UTV	Utility Terrain Vehicle
Visitor	An individual invited to a field location for business purposes who is not performing work for the University of Calgary. Visitors include media personnel, donors, industry partners, faculty from other universities, research institutes or business organizations, government entities and inspectors. Visitors do not include employees, volunteers, consultants, contractors, or members of the public.

Volunteer	Individuals who, with or without special training, provide services or assistance to the university without payment of fees, wages, or salary and without any expectation of any kind of compensation (except travel costs or meal expenses). <ul style="list-style-type: none"> • Volunteers must be over 18 years old • have Canadian Citizenship or Permanent Resident Status in Canada or are a current international student enrolled full time at the University of Calgary and hold a study permit. In this case, the volunteer activities must be short-term and incidental to their student work.
WCB	Worker's Compensation Board
WHMIS	Workplace Hazardous Material Information System
Wilderness Location	Means: (a) an area that has not been subject to significant human development activity; (b) rural areas that not under agricultural cultivation; (c) marine environments.

2. INTRODUCTION

The University is committed to promoting the health, safety and well-being of employees, students, volunteers, visitors, and contractors, as well as providing a safe and healthy environment in which to conduct instructional and research activities, in accordance with the University of Calgary Environment, Health and Safety Policy.

This Standard has been written to provide guidance to users in assessing risk and implementing controls appropriate for field related work and education and is aligned with the legislated requirements of the Alberta Occupational Health and Safety Act, Regulation and Code. The University is committed to meeting or exceeding legislated requirement made under the Alberta Occupational Health and Safety Act, Regulation and Code.

Whether you will be supervising others or will be pursuing your academic or research program individually, by following the procedures described in this document you endeavors will have a greater likelihood of success and should unexpected events occur, you will be prepared to respond effectively.

Environment, Health and Safety can assist with the implementation of this Standard and its procedures on request and users may periodically be asked to demonstrate adherence to this Standard.

2.1 PURPOSE

The Field Safety Standard includes procedures used to identify existing and potential field hazards as well as controls required to mitigate or manage associated risks. Hazard assessment and control is the foundation of the University's Environment, Health and Safety Management System (EHSMS) as only identified hazards can be eliminated or controlled. The objective of this Standard is to reduce risk to as low as is reasonably achievable for field activities related to research and instruction.

2.2 SCOPE

The University has developed and implemented this Field Safety Standard that clearly defines and stipulates the responsibilities of all workplace parties involved in academic research and instruction involving travel and field activities including:

- Domestic Field Research

- Domestic Field Schools and field trips
- International Field Research
- International Field Schools and study groups
- Travel to research stations for Field Research of Field School activities
- Field activities and travel related to team building and skill development

The following travel and activities are **outside** the parameters of this Standard but still have a requirement for completion of a [field hazard assessment \(FLHA\)](#) and [field communication plan](#) and may be subject to compliance with the Vehicle and Drier Safety Standard:

- Day trips within the City of Calgary
- Travel and activities associated with conferences
- Travel where there are no planned field related activities
- Travel by sports teams and clubs
- Recruitment, fundraising, and promotional activities identified on a job profile hazard assessment and control form (HACF)
- Facilities Management (FM), Project Management Office (PMO) related activities

Practicum activities that are covered under the health and safety management system of another organization and registered programs that are publicly accessible are outside the parameters of this Standard.

3. ROLES AND RESPONSIBILITIES

Roles	Responsibilities
Deans, Directors, and Department Heads	<ul style="list-style-type: none"> • Ensuring supervisors and workers are familiar with and follow the requirements of this Standard • Ensuring supervisors and workers are provided with appropriate controls to minimize potential exposures • Reviewing pre-trip plan, communication plan and emergency response plans for completeness before approving
Supervisors	<ul style="list-style-type: none"> • Being familiar with and adhering to this Standard • Ensuring workers are familiar with and follow this Standard • Retaining training records • Collecting and securing emergency medical release forms for all participants • Balancing level of risk with the level of participants knowledge, experience, and abilities • Management or mitigating the level of risk which students, staff and other participants are exposed to • Consulting with Environment, Health and Safety as needed <p>While planning, teaching, leading courses and conducting research in the field, supervisors need to:</p>

	<ul style="list-style-type: none"> • Be aware of the common practices or industry standards for the activity you are leading or instructing • Possess the appropriate qualifications and experience for the activity and level in which you are engaging • Ensure that the activity has been adequately planned and documented, and that procedures and methodologies are in place • Verify that all participants have received the appropriate education and training and are aware of the specific roles • Confirm that a detailed emergency response plan, for the trip being led, has been established and that all participants can implement the plan in the field in case of an emergency • Carry communication equipment appropriate for the location and complexity of the trip. You must be able to contact assistance at any point during your trip • Engage participants by following the documented plan and, if deviating from these, document your reasons for doing so • Keep detailed records of near misses and incident that occur • Conduct daily safety talks with program participants, conduct regular site risk assessments, eliminate hazards where possible
Participants	<ul style="list-style-type: none"> • Being familiar with and adhering to this Standard • Reviewing the completed pre-trip plan • Using controls identified • Consulting with supervisors to ensure potential hazards have been eliminated or controlled effectively • Following all health and safety standards, rules, and regulations, and reporting all hazardous conditions to their supervisor immediately • Completing required training • Providing all required documentation • Taking reasonable care of their own health and safety and the health and safety of others • Reporting to the supervisor, any illness or condition that may hinder their ability to perform require tasks
Facilities – Supply Chain	<ul style="list-style-type: none"> • Identifying preferred vendors where appropriate • Providing consultation on equipment and transport contracts as appropriate
Facilities - Fleet	<ul style="list-style-type: none"> • Ensuring fleet vehicles are well maintained • Providing off roadside emergency kits for fleet vehicles
Risk Management and Insurance	<ul style="list-style-type: none"> • Provide guidance on waiver and insurance requirements • Develop, review, and update the University of Calgary’s International Travel Program and Travel Registry processes • Implement university approved driver registration processes
Global Learning	<ul style="list-style-type: none"> • Review, update and implement Study Abroad and Group Study programming • Meet or surpass Field Safety Standard requirements

Environment, Health and Safety	<ul style="list-style-type: none"> • Developing, reviewing and updating the University’s Field Safety Standard, Procedure and associated templates and forms • Developing and providing Hazard Assessment and Control training • Providing guidance on completion of the forms and/or determination of required controls • Developing, reviewing and updating associated programs (Working Alone Standard, Vehicle Safety Standard, etc). • Determining training requirements and preferred vendors and programs for required training
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4. REQUIRMENTS

The Field Safety Standard includes the following main components:

- Pre-trip Plan
- Document Review and Approval
- Pre-trip Meeting
- Daily On-site Field Activities
- Post-trip Debrief

5. PRE-TRIP PLANNING

Identification of planned field activities and related hazards is to be conducted prior to any field research trips as well as curricular and non-curricular based field school trips.

Day trips within the City of Calgary may use the [Field Level Hazard Assessment and Field Activity Communication Plan](#) forms to complete pre-trip planning requirements.

If planning a “series” of trips (multiple single-day trips, or multiple multi-day trips), with the same location and activities, a single approved Pre-Trip plan may be used for the series. Where weather related hazards change significantly between seasons, a season specific approved Pre-Trip Plan may be appropriate.

Based on the level of risk associated with the activities, location, and participants for the proposed field experience:

- Appropriate controls must be identified and implemented
- Travel and transportation details provided
- Accommodations and locations identified
- Required equipment identified and provided
- Hazardous materials identified and accommodation plans provided
- Psychological safety and human factors acknowledged and addressed
- A communication plan and an emergency response plan developed
- Appropriate training and documentation completed and verified

Once complete, the pre-trip plan must be reviewed and approved by department and or faculty leadership as deemed appropriate based on risk level, type of travel, and category of participants. After approval and prior to the trip, all participants must meet to review and discuss the hazards and controls

identified in the pre-trip plan. Participants must then sign that they have reviewed the documents and understand their responsibilities with respect to all controls identified therein.

5.1 FIELD ACTIVITY DETAILS AND DATA

Provide overview details about the travel and field activities including:

- Faculty/Department
- Type of activity
- Planned dates for activity
- Description or name of activity or course title
- Site location details
- Number and Type of participants involved in the activity

5.2 HAZARD ASSESSMENT AND HAZARD CONTROL

'Supervisors must advise all workers of all known or reasonably foreseeable hazards to health and safety in the area where the worker is performing work' Alberta Occupational Health and Safety Act 2020, Part 1, Section 4 (b).

'A hazard is a situation, condition or thing that may be dangerous to health and safety' Alberta Occupational Health and Safety Act, Definitions 1(p). Hazards can be any materials, process, practice, etc. that has the potential to cause physical injury, damage, or adverse health effects to a person, equipment, property, or environment.

Supervisors must identify existing and potential hazards associated with people, equipment, materials, environment, or processes; as well as identify and implement engineering, administrative and/or personal protection equipment to help reduce the probability or severity of such hazards. These hazards and controls must be recorded and reviewed with all participants prior to the trip.

A hazard and control library has been developed to assist with identification of activities and associated hazards. Both required and recommended controls, including required training, have been identified for these activities, based on risk assessment. This list is not all inclusive and should be used in conjunction with experience, knowledge, and team discussions to ensure that the hazard assessment and control requirements are thorough and complete for each activity.

If proposing maps, weather reports, etc. as a control, individual resources must be specifically identified.

5.3 ACCOMODATION AND LOCATION DETAILS

When booking hotels, every effort shall be made to use preferred vendors as identified in the preferred supplier list. This list identifies suppliers that have been vetted and approved by Supply Chain Management (SCM) and may have reduced rates identified for University of Calgary business travel.

Provision of GPS coordinates of domestic or international remote, isolated or wilderness locations allows users to register their travel in the Risk Management and Insurance (RMI) Travel Registry system. This can substantially reduce delays in provided emergency response and assistance in these

areas. RMI can also provide notification to travellers of any sudden increased risk due to weather, health advisories, political unrest, travel disruptions, etc.

5.3.1 INTERNATIONAL TRAVEL

All research related to international travel (travel outside of Canadian borders) must follow the Risk Management and Insurance (RMI) International Travel Program requirements and travel must be registered in the Travel Registry system.

All international travel related to instructional activities must follow the University of Calgary Global Learning Study Abroad and Group Study Program guidelines and travel must be registered in the Travel Registry system.

For international travel, assistance in identifying pre-screened local accommodations can be requested through International SOS app or by completed the on-line form at <https://www.ucalgary.ca/risk/risk-management-insurance/travel/travel-briefings>.

5.4 DRIVING ON UNIVERSITY BUSINESS

Anyone driving on University of Calgary business must comply with the Vehicle Safety Standard. This includes driver qualification, safety driver training, journey management requirements, etc. Pulling trailers and riding off road vehicles such as ATVs, UTVs, snowmobiles, watercraft, etc. is considered a high-risk activity and requires further consideration with EHS and RMI. Further specialized training may also be required for these activities.

RMI must be contacted prior to driving a 12+ passenger van on University of Calgary business.

5.5 CONTRACTED TRANSPORTATION SERVICES

When booking travel for domestic or international locations outside of Canada, use of SCM preferred vendor is recommended. This includes airlines, vehicles rentals, charter busses, water vessels, etc.

For international travel, assistance in identifying pre-screened local ground transportation services, can be requested through International SOS app or by completing the on-line form at <https://www.ucalgary.ca/risk/risk-management-insurance/travel/travel-briefings>.

5.6 EQUIPMENT CHECKLIST

It is the supervisor's responsibility to ensure that all required equipment is in good working order, properly maintained and inspected. Verification that Safe Operating Procedures (SOPs) documents are available for review while in the field is imperative. Consideration should be given to packing required maintenance tools and extra batteries when appropriate.

Required communication devices, emergency response equipment, and personal protective equipment (PPE) must be identified in the pre-trip plan and appropriate numbers of these items must be made available to meet the requirements of the group.

Some specialized equipment such as VHF radios, drones, etc. may require further licensing or documentation.

Equipment rented or borrowed from a third party may need to be insured – contact RMI for more information.

5.7 HAZARDOUS MATERIALS

Hazardous materials that are used in the field may be subject to federal, provincial/territorial, and/or municipal legislation. The relevant sections of the following programs must be adapted for field work, if necessary, and followed:

- Laboratory Safety
- Biosafety
- Radiation Safety

SOPs (using the University of Calgary template) are to be developed describing safe handling, storage, emergency response, transportation, and disposal. Safety Data Sheets (SDS) and Biological Safety Data Sheets (BSDS) documents, PPE and emergency response equipment must be readily accessible to all participants while in the field.

Unless other arrangements have been made, all water products must be returned to the University of Calgary for proper disposal.

Transportation of Dangerous Goods legislation may apply to the hazardous materials. EHS provides generic training, but site-specific training is the responsibility of the supervisor.

5.8 REQUIRED TRAINING

It is the responsibility of the supervisor to ensure that all participants have completed all required training prior to participation in field related travel and activities. All employees of the University of Calgary are currently required to complete Harassment and Violence Awareness training, Occupational Health and Safety Orientation training and Hazard Assessment training. Further required training, identified in the pre-trip plan hazard assessment, must also be completed.

All completed training must be properly documented and verified by the supervisor.

Training courses and preferred vendors as identified by the EHS Department must be used. If a preferred course or vendor has not been identified, contact EHS for assistance.

The presence of participants with current first aid training must be documented. Expired first aid certification is not acceptable. It is recommended that all supervisors, team leaders and identified responsible adults be Certified First Aiders.

Certified First Aiders identified for travel and field activities in remote, isolated and wilderness locations must also have completed the University of Calgary on-line Field Safety training.

5.9 FIRST AID REQUIREMENTS

The Alberta Occupational Health and Safety (OHS) Code requires employers to provide first aid and have designated Certified First Aiders at work sites. The OHS Code defines the minimum standards in services, equipment, and supplies and stipulates the number of Certified First Aiders, the level of *approved* first aid training required, the type and number of first aid kits required, and the type and quantity of supplies and equipment required. These requirements are based on the hazard level of the

work performed at the workplace, the number of workers present for each shift (includes faculty, support staff and students), and the distance to medical care.

All Certified First Aiders must be clearly identified to all participants daily and documented in safety plans.

5.9.1 FIRST AID KITS AND SUPPLIES

First aid kits and supplies are required to be provided and maintained by each faculty/department/business unit and meet the requirements outlined in the OHS Code. The supervisor must check first aid kits prior to departing on a trip and replace missing supplies. The inclusion of medication(s) within first aid kits falls outside the scope of first aid. The inclusion of over-the-counter medication in first aid kits is not recommended by the province.

Any fieldwork, field school or distant work sites are required to have a Number 2 first aid kit for less than twenty people and Number 3 first aid kit (or two Number 2 first aid kits) for more than twenty people. A Type P (Personal) first aid kit is required when a worker is performing work alone or is in transit to a worksite (i.e., travelling to a field station). A complete list of kit content requirements can be found on the EHS website – First Aid Program.

It is recommended that groups carry an Automated External Defibrillator (AED). It is also recommended that a bleed kit be available for groups working or learning in a remote, isolated or wilderness location.

5.9.2 APPROVED FIRST AID COURSES AND PROVIDERS

For medium hazard field work, the University of Calgary has approved the following first aid training and vendors:

- Red Cross Standard First Aid and CPR (14 hours)
- University of Calgary Active Living Standard First Aid with CPR-C and AED blended – online plus 8 hours in-class.

These courses are suitable for medium hazard work in remote, isolated and wilderness locations if completed in conjunction with the University of Calgary on-line Field Safety training.

5.9.3 FIELD ACTIVITY FIRST AID REQUIREMENTS

According to the AB OHS Code, Schedule 2 First Aid, field activities will typically be identified as a medium hazard work and include:

- Any work that is not administrative in nature and not considered 'high hazard'
- Any work that takes place away from a worker's primary worksite (i.e., field work sites)

To define clear first aid requirements for field activities, location must be identified.

5.9.3.1 URBAN AREAS

If field activities will be occurring work in an urban area, please refer to the EHS First aid Program for guidance.

5.9.3.2 REMOTE, ISOLATED AND WILDERNESS LOCATIONS

If field activities will be occurring in a remote, isolated or wilderness location (see definitions below), please adhere to the provided first aid requirement guidelines below (adapted from AB OHS Code Schedule 2 First Aid Table 6). Wildlife and Wilderness Awareness training will also be required for all first aiders for these destinations.

Remote location means a site: (a) is 80kms or more from a settlement or community with a population of 1,000 or more; (b) that lacks transportation and communication links that are typical in more populated areas; and (c) may be located on grazing and ranch lands.

Isolated location means: (a) a site that is located over 350kms from the nearest population centre with conventional services and year-round road access; (b) a settlement that has regular air service and reliable telephone service but no year-round road access, and (c) for the purpose of determining first aid requirements, an Indigenous, Inuit or Métis settlement where conventional services may not be reliable or available.

Wilderness location means: (a) an area that has not been subject to significant human development activity; (b) rural areas that are not under agricultural cultivation; and (c) marine environments.

Number of Participants on site per shift	<ul style="list-style-type: none"> Remote locations 2 or more hours from organized health care Wilderness locations (less than 3 hours from organized health care) Day trips 	<ul style="list-style-type: none"> Remote, Isolated, or Wilderness Locations (3+ hours from organized health care) Challenging environments with elevated risk Multiday trips
1-4	1 Standard First Aider with Field Safety Training # 2 first aid kit	1 Standard First Aider with Field Safety Training # 2 first aid kit
5-19	2 Standard First Aiders with Field Safety Training # 2 first aid kit	2 Standard First Aiders with Field Safety Training # 2 first aid kit
20-49	3 Standard First Aiders with Field Safety Training 1x # 3 (or 2x # 2) first aid kit	4 Standard First Aiders with Field Safety Training 1x # 3 (or 2x # 2) first aid kit
50-99	4 Standard First Aiders with Field Safety Training 2x # 3 (or 3x # 2) first aid kit	5 Standard First Aiders with Field Safety Training 2x # 3 (or 3x # 2) first aid kit
100-200	5 Standard First Aiders with Field Safety Training Plus 1 Standard First Aider with Field Safety Training for each additional increment of 1-100 workers 2x # 3 (or 4x # 2) first aid kit	6 Standard First Aiders with Field Safety Training Plus 1 Standard First Aider with Field Safety Training for each additional increment of 1-100 workers 2x # 3 (or 4x # 2) first aid kit

5.9.3.3 EXTREME LOCATIONS AND EXTREME ACTIVITIES

- Examples of extreme locations include but are not limited to volcanos, glaciers, oceans, etc.
- Examples of extreme activities include but are not limited to rock climbing, mountaineering, ice climbing, scuba diving etc.

If field activities involve any extreme locations or extreme activities, contact EHS directly for guidance on first aid requirements.

5.9.3.4 HIGH HAZARD WORK

- Construction or demolition
- Operation and maintenance in an industrial setting
- Woodland operations
- Gas and oil well operations
- Seismic operations
- Detonation of explosives

If field activities involve any high hazard work, contact EHS directly for guidance on first aid requirements.

5.9.4 EMERGENCY TRANSPORTATION

'Requires employers to ensure that arrangements are in place to transport injured or ill workers from the work site to the nearest health care facilities before workers are sent to a work site. An employer must ensure that an ambulance service is readily available to the work site when travel conditions are normal.'

If an ambulance service is not readily available to the worksite, or if travel conditions are not normal, an employer must ensure that other transportation is available that

- a) Is suitable, considering the distance to be travelled and the types of acute illness or injuries that may occur at the worksite,
- b) Protects occupants from the weather
- c) Has systems that allow the occupants to communicate with the health care facility to which the injured or ill worker is being taken, and
- d) Can accommodate a stretcher and an accompanying person if required to

If a worker is acutely ill or injured or needs to be accompanied during transport to a health care facility, an employer must ensure that the worker is accompanied by at least one first aider, in addition to the operator of the transportation, unless there are three or fewer workers at the worksite.' Alberta Occupational Health and Safety (OHS) Code Part 11, Section 180(1)-(6)

5.10 COMMUNICATION PLAN

"Requires an employer to provide an effective communication system consisting of either radio communication, landline or cellular telephone communication or some other effective means of electronic communication. Regular contact by the employer or designate at intervals appropriate to the nature of the hazard associated with the worker's work must be pre-arranged in case the employee

is unable to access or use the communication device for some reason. Frequency of the check-in should increase in accordance with an increase in risk of the work or work location.” Alberta OHS Code 2009, Part 28, Working Alone, (394(1).

Every participant must be provided access to or a copy of the Emergency Communication Plan. If a scheduled check in is missed, follow the Missing Person-Lost-Contact Emergency Response Plan. If contact has not been regained within one-hour, initiate Emergency Communication Plan.

5.10.1 ON-SITE COMMUNICATION

While working in the field, if small groups or individuals are not in line-of-sight while working, a regular check in with the location supervisor is required at pre-arranged intervals. The check in schedule and communication method is to be reviewed and recorded daily during the on-site daily briefing.

5.10.2 CHECK-IN WITH UNIVERSITY CAMPUS

A check in delegate at University of Calgary home campus must be available for the entirety of the field activity. This person may be someone appointed by the supervisor, or be designated by the Department or Faculty, and must be provided the authority to escalate communication in an emergency. Check in must be scheduled and must clearly indicate method of communication.

5.10.3 EMERGENCY COMMUNICATION PLAN

It is the supervisor’s responsibility to identify emergency contact information for their destination. This must include medical assistance, local enforcement authorities, and mental health support services.

For remote, isolated and wilderness locations, registration with STARS, Search and Rescue, and /or the Local Park Authorities may be necessary. Requirements to report wildlife and/or wildfire sightings may also be required and should also be noted.

For international destinations International SOS, and Global Affairs Canada will accept collect calls. Further contact details can be found through the International Travel program (RMI) or through the University of Calgary International Study Abroad program.

5.10.4 COMMUNICATION EQUIPMENT

A communication device that allows you to signal for emergency medical support is required. This may be a cell phone with the University of Calgary Safety App, a satellite phone, a two-way GPS satellite-based messaging device (inReach), or a SPOT (one-way line of communication through pre-defined text messages).

Use the provided Field Communication Device Selection Guide to help determine what type of communication equipment is most suited to the specific work location and associated requirements.

It is the supervisor’s responsibility to ensure an appropriate communication device is available, based on the location and type of activities and that all training requirements, programming, and other details pertinent to the specific device are in place and documented. It is recommended that extra batteries for all communication devices in use, be carried.

5.11 EMERGENCY RESPONSE

Emergencies are sudden events that will occur, so pre-trip planning is necessary. Without preplanning, an urgent need for rapid decisions in the face of immediacy, limited resources (both material and human) can lead to chaos during an emergency. The stress of the situation can lead to poor judgment. A well thought-out, well-organized emergency response plan will help to minimize potential issues; reduce human injury; and reduce or prevent damage to property and the environment.

Besides conforming to legislative requirements and the benefit of providing guidance during an emergency, developing the emergency response plan has other advantages. It may lead to the identification of previously unidentified potential hazards that could exacerbate an emergency or lead to the identification of deficiencies such as a lack of resources including equipment, supplies and participant training, that can be corrected before an emergency occurs. In addition, an emergency response plan promotes safety awareness and shows a commitment to the safety of all participants.

Develop an emergency response plan by identifying 3 potential emergencies based on the participants, activities, and location. The possibility of one event triggering others should be considered (e.g., electrical storm causing fires or flooding causing structural failure). Consider the impacts of such an event (evacuation, casualties, damaged equipment, loss of documentation, etc.) Based on these impacts, determine the required actions and resources.

The emergency response plan must specify those participants who may put the plan into action. Specific duties, responsibilities, authority, and resources must be clearly defined. Assigned responsibilities would include but would not be limited to:

- Reporting the emergency
- Alerting participants
- Assuming command and directing emergency response
- Alerting external agencies as necessary
- Ensuring evacuation of all participants
- If necessary, medical aid and/or transportation if required
- Further escalation as necessary
- Follow up reporting

5.12 INCIDENT REPORTING

All activity related incidents must be reported to the University of Calgary using the Online Accident Reporting System (OARS) as soon as practicable and within 24 hours of the incident.

5.12.1 ONLINE ACCIDENT REPORTING SYSTEM (OARS)

Reporting an accident in the OARs system (<https://www.ucalgary.ca/risk/environment-health-safety/report-incident>) must be done by the supervisor. If this is not possible, specific details of the incident must be recorded on the template provided and emailed to the appropriate department for assistance in entering the data.

- Near miss means any undesired event or incident that under slightly different circumstances could have resulted in personal injury, illness, environmental release, or loss.
- First aid includes assistance provided by first aider on site with no further medical assistance required.

- Medical aid includes medical and other services provided by a licensed medical practitioner, including hospitalization, drugs, dressing, x-ray treatment, appliances, apparatuses, transportation, etc.
- Lost time, an injury or disease (illness) related to the activity, which is likely to cause the participant to be required to take time off beyond the day of the incident from the activity.

5.12.2 WORKERS COMPENSATION

When an accident occurs to an employee, or where a student is injured during their credit course work, they must complete a WCB report **within 72 hours**. Please see <https://ucalgary.ca/risk/risk-management-insurance/insurance/workers-compensation-insurance> for more information and to access the correct forms. The University of Calgary could face fines of up to \$50,000 for non or inappropriate reporting.

All accidents require completion of the OARS form, however, if an accident falls into either the medical aid or lost time category, there will be Workers' Compensation Board (WCB) reporting requirements. All WCB reportable incidents require the completion of WCB forms (student or employee specific) and the University of Calgary's OARS incident report.

5.13 PARTICIPANT REQUIRED DOCUMENTATION

It is the supervisor's responsibility to ensure all participants have all required documentation, authorizations, and emergency contact information completed and verified prior to travel.

All sensitive documents must be maintained in a secure manner in the event that details are required for an accident or injury situation.

5.13.1 PERMITS, WAIVERS, AND INSURANCE REQUIREMENTS

Specific legal requirements such as waivers, informed consent, insurance, permits, etc. will vary based on the type of participant, the purpose of the field excursion, and the type of activities taking place. For further details and information visit the [waiver website](#) or contact Risk Management and Insurance.

Volunteers must be registered, trained, and complete a waiver of liability. See the [Volunteer Registration and Management webpage](#) or contact Risk Management and Insurance.

Visitors must review and sign the On-Site Field Activity Procedural document or FLHA for the day of the visit. If the visitor will be participating in on-site field activities a waiver may be required. See the [Campus Visitor webpage](#) or contact Risk Management.

5.13.2 IMMUNIZATIONS AND MEDICAL RECORDS

The supervisor must ensure all participants have all required government issued documentation for international travel. Based on travel destination there may be vaccination or other medical requirements. Refer to the International Travel Program for more information.

5.13.3 EMERGENCY INFORMATION

An emergency contact and medical information form is required for all participants. The original of this form will be kept in a secure file in the department/faculty and a copy will be kept in a sealed envelope with the supervisor.

In the event of illness, injury or medical condition in the field, the supervisor has the authority to open the envelope and to provide any necessary information to a person administering first aid or to medical personnel as necessary, to ensure the health and well-being of the participant.

Participants must provide both common and legal names on the document (if different).

The sealed field envelope and all copies filed centrally, shall be shredded upon completion of the activity and participant's return to campus.

Participants should be encouraged to disclose medical details that could potentially be negatively impacted by field activities or locations (e.g. Allergy to bee stings).

5.14 DOCUMENT REVIEW AND APPROVAL

Final review and approval of the field pre-trip plan is the responsibility of the Department Head (or next level up if a Department Head is unavailable). The signature of the Department Head is required to confirm that the document has been reviewed and to confirm that the document is complete.

Faculties may consider implementing a Field Safety Document Review Team to assist in performing a rigorous review of Field Safety Pre-Trip Plans prior to submission to the Department Head for final review and approval. This process can help ensure documentation is both complete and thorough, consistently filed, and a second set of eyes may identify hazards or controls that may have been missed.

6. PRE-TRIP MEETING

The required pre-trip meeting addresses the employer and worker obligations as outlined in AB OHS Act Part 1 and therefore a written and dated record of the meeting is required to be signed by all participants and must be uploaded to the trip file and attached to the pre-trip plan. This meeting provides the opportunity to review and discuss the pre-trip planning document with all participants, as well as discussing any other questions or concerns that may arise.

For many participants, this may be their first experience doing field research, participating in a team building activity or going on a field school related excursion. It may be their first time in a rural or wilderness location or a foreign city. Ensuring the safety and inclusion of every participant is crucial to promoting psychological safety and is a necessary part of a successful field experience.

This meeting is an opportunity to build collaborative and trusting relationships between participants prior to leaving and while on site. Encourage open, respectful dialogue that promotes inclusion and collaboration among participants.

6.1 REQUIRED AGENDA ITEMS

The following agenda items must be covered during the pre-trip meeting:

- Review the approved pre-trip plan and associated documents
- Review and provide copies of the Communication and Emergency Response Plans to all participants

- Trip preparation and requirements including but not limited to documentation, vaccinations, training, equipment and clothing, personal effects, and medications
- Check the destinations local news for any advisories or current events that may impact the trip
- Workplan and objectives
- Roles and responsibilities
- Discuss participant expectations regarding behavior, work ethic, and creating a psychologically safe and learning environment including how to report concerns

6.2 PSYCHOLOGICAL SAFETY, MENTAL HEALTH, AND EMOTIONAL WELLBEING

All members of the University Community have the right to learn, work, and live in an environment where they are free from harassment, discrimination, and violence. Boundaries exist in many forms: physical, emotional, spiritual, intellectual, sexual, as well as those related to time and technology. Each participant must define and maintain their healthy personal boundaries and learn to respect others' boundaries as well as learning to recognize the subtle ways in which someone might indicate their boundaries. Consider developing a Team Charter to help define how the team will work together respectfully.

6.2.1 AUTHORITY AND POWER DIFFERENTIALS

Are characterized by power imbalances which may have a significant impact on an individual's experience. In remote settings, graduate and professional students rely heavily on supervisors for resources such as communication devices, transportation, food, and potentially emergency support. Participants may have limited access to personal, close support systems outside of their colleagues. Because of this dependence, if one of those team members is bullying, harassing, or perpetrating violence, the targeted individuals have fewer avenues for safety and support. Ensure all field team members have clear channels of communication and support.

6.2.2 DIVERSITY

Is essential to inclusive excellence in research, teaching and learning. A diversity of voices, experiences and perspectives fuels novel ideas, critical thinking, faster problem-solving, better decision-making, higher employee engagement, and drives creativity and innovation. A diverse talent pool creates the opportunity for new insights and answers to some of the biggest challenges of our time. The University of Calgary strives to build an equitable, diverse, inclusive, safe, and educational space for all and is committed to fostering equitable pathways to achieving inclusive excellence.

6.2.3 HARRASMENT AND VIOLENCE

Are considered hazards under the Alberta OHS Act Regulation and Part 27 of the OHS Code with requirements to ensure workers are not subjected to or participate in harassment and violence at the work site. Employees, supervisors, and managers must be familiar with the OHS Act, Regulation, and Code and University of Calgary policies and procedures related to harassment and violence. Harassment and violence must be reported. Refer to the appropriate policy for reporting procedures.

Harassment means any single incident or repeated incidents of objectionable or unwelcome conduct, comment, bullying or action by a person that the person knows or ought reasonably to know will or would cause offence or humiliation to a worker, or adversely affects the worker's health and safety, and includes conduct, comment, bullying or action because of race, religious

beliefs, colour, physical disability, mental disability, age, ancestry, place of origin, marital status, source of income, family status, gender, gender identity, gender expression and sexual orientation, and a sexual solicitation or advance but excludes any reasonable conduct of an employer or supervisor in respect of the management of workers or a work site.

Violence whether at a work site or work-related, means the threatened, attempted, or actual conduct of a person that causes or is likely to cause physical or psychological injury or harm, and includes domestic or sexual violence.

6.2.4 SEXUAL AND GENDER BASED VIOLENCE

Means any violence, physical or psychological, that is committed, threatened, or attempted against another individual without the individual's consent by targeting an individual because of their sex, gender identity, gender expression, or sexual orientation. This includes gender-based violence, sexual assault, sexual harassment, stealing, indecent exposure, voyeurism, creating, acquiring, or distributing degrading sexual imagery, the acquisition or distribution of a sexual image or video without their consent, and stalking that targets an individual based on their sex, gender identity, gender expression or sexual orientation. It can include a single incident or a pattern of behaviour whether in person, online, or via other means.

6.2.5 WORKING IN ISOLATION

Can introduce feelings of depression and loneliness because of a lack of social interactions in remote work locations. Isolation, and lack of structure can lead to stress which, if sustained for an extended period, can result in decreased immune response and lack of concentration, putting participants at a greater level of risk. Supervisors can help reduce the effects of isolation by providing workday structure with regularly scheduled activities, social interactions that are both work/studies related and extracurricular in nature. Keep lines of communication open.

6.2.6 UNCLEAR LEADERSHIP EXPECTATIONS

Can result in inappropriate behaviours, poor work ethics and decreased participation. Setting clear expectations is an essential responsibility of all supervisors. Clear leadership communication regarding expectations is essential for productivity. Success is only possible if the participant fully understands what is expected of them. Establish behavioural and work expectations for all participants during trip preparation discussions and daily on-site briefings.

6.2.7 WORKLOAD/WORK-LIFE BALANCE

Needs to be specifically considered especially when the lines between work hours and personal time can become blurred while working and living in a field location. Supervisors must allocate tasks based on participant competency and capacity. Be aware that working in unfamiliar conditions and in unfamiliar locations can greatly impact a person's resiliency and allocation of tasks should reflect this awareness. Supervisors must check in often with participants to ensure assigned workload is appropriate for their current state of mind and fitness level.

6.2.8 DEPRESSION, ANXIETY, HOMESICKNESS

May occur when a participant becomes overwhelmed by the changes faced in new and unfamiliar environments. Exposure to different languages, cultures, food, weather, etc. may result in culture shock which may in turn result in feelings of fear, discomfort, and an inability to adapt to the new surroundings. Feeling isolated or separated from familiar people and locations

may result in emotional distress or homesickness which can negatively effect productivity and cause physical symptoms such as headaches, fatigue, reduced appetite, and experience sleep disturbances. Some participants experiencing depression or anxiety may withdraw from group activities, lack the ability to concentrate and appear sad or angry. Supervisors can reduce the impact of culture shock and homesickness by providing participants with information about the destination prior to travel, ensuring all participants are involved and included in group activities and maintaining open lines of communication with all participants.

6.3 REPORTING INCIDENTS OF HARASSMENT, VIOLENCE, OR INAPPROPRIATE BEHAVIOR

Disclosure can be a vulnerable and scary process. Ensuring the participant feels emotionally and physically safe in a space helps establish trust. Do this by verbally checking in and offering to move to a location of the survivor's choice. Avoid public areas where the conversation may be overheard.

Acknowledge the participant for approaching you with this matter. This helps communicate that their courage is recognized and valued.

Being transparent about the supervisor's obligations (ex. level of confidentiality, reporting requirements, etc.) assists in building trust and empowering the participant to make an informed choice. Try to inform the participant before the disclosure occurs. If this is not possible, inform them afterwards and let them know the next steps in the process.

Regardless of the amount of detail shared, connecting the participant to confidential resources gives them access to continuing support. The supervisor can offer to call together or provide the information so the participant can call on their own. Individuals who have been subjected to or become aware of harassment and who wish to make a complaint may contact:

- ODEPD (<https://www.ucalgary.ca/pdri/report-incident>)
- HR
- Student Conduct Office
- Sexual and Gender Based Violence Support and Response Office (svsa@ucalgary.ca)
- Confidence Line (1-800-661-9675)
- A manager, supervisor, or dean
- Campus Security (1-403-220-5333)

7. DAILY BRIEFING ONSITE

Alberta Occupational Health and Safety Act, Regulations and Code stipulates in Part 1 Section 3 (2) that: *"Every employer shall ensure that workers are adequately trained in all matters necessary to protect their health and safety, including before the worker*

- a) begins performing a work activity*
- b) performs a new work activity, uses new equipment, or performs new processes, or*
- c) is moved to another area or work site"*

Field activities by their very nature introduce new activities and new worksite conditions daily and as such, a daily review of the day's tasks, hazards, and controls must be completed with all employees. If any new hazards, required controls or changes in activities are identified, these must be discussed with all participants and documented. If there are no changes, this must also be documented.

Once complete, the daily briefing must be dated, and signed by all employees prior to activities beginning each day. Signatures on this document may be provided as “wet ink” or “electronic”.

If conditions change during the day, any new hazards and controls must be discussed with all participants and documented. Daily briefings must be retained and uploaded into the trip file upon return to campus and must be reviewed in the post-trip debrief process to identify any recommended improvements for future trips.

A Field Safety Daily Briefing Checklist of things to be considered during the on-site daily briefing has been prepared to assist in identifying changing conditions which could impact the safety of participants. The Hazard and Control Library may also be a valuable reference during this process to help identify hazards and appropriate controls.

7.1 UNINTENDED WILDLIFE ENCOUNTERS

There are several factors that might indicate a higher level of risk of wildlife encounters during outdoor activities. These include the animal’s behaviour, breeding season or presence of offspring, time of day, food sources, etc. An Unintended Wildlife Encounter Risk Matrix has been prepared to help provide guidance on what precautions are recommended during various scenarios of wildlife encounters. It is recommended that this document be reviewed daily as part of the Daily Briefing and reviewed if wildlife or signs of wildlife are observed near the work site. It may also be provided to participants as a wallet size card so that it can be referenced at any time.

8. POST-TRIP DEBRIEF

It is essential that lessons learned are captured, discussed, and documented. A post-trip meeting with all participants to review the pre-trip plan and all FLHA on-site daily briefings is to be conducted. This meeting provides the opportunity to share lessons learned and discuss opportunities for improvement. Alternatively, a post-trip debrief may be conducted using an online survey option if a participant meeting is not achievable.

Lessons learned are to be documented and added to the trip file so that these details are available for future similar trips.

9. DOCUMENT MANAGEMENT AND RECORD RETENTION

Approved Field Safety pre-trip plan and related documents should be filed digitally in a central location accessible by Faculty Leadership, Department Head, approved administrative staff, and the review team. These documents must be available and accessible in case of an emergency.

Each Trip file should be consistently and clearly identifiable for emergency access and trackability (consider using *yyyy-mm-dd -department- trip identifier*) and will include the following documents:

- Pre-Trip plan with Department Head signature of approval
- Participant Emergency Information Forms for all participants
- Pre-Trip meeting document with signatures
- All On-Site Daily Briefing FLHAs with employee signatures
- Post-Trip Debrief document

It is recommended that a field activity tracking spreadsheet be incorporated at the department level so that groups that are away from campus are easily identified. It is the Department Head's responsibility to know when and where their employees and students are, especially when they are in field locations. An example of a Field Activity Tracking Spreadsheet can be viewed in the Field Safety Document Review Team Process and Set up Guide.

Field Safety documents must be retained for a minimum of 3 years. Documents contain personal information and once obsolete must be archived or disposed of in a secure manner. All Participant Emergency Information Forms are to be shredded upon group's return to campus.

10. REFERENCES

- Alberta OHS Act, Regulation and Code
- Provincial Parks (General) Regulations
- Wilderness Areas, Ecological Reserves, Natural Areas and Heritage Rangelands Act
- Alberta Guide to Hunting Regulations
- 511 Alberta
- Alberta Fish and Wildlife
- Open signal Cell Coverage Maps
- Canadian Wildland Fire Information System
- Working Alone Standard
- First Aid Program
- Vehicle Safety Standard
- FM-Fleet Driver's Handbook
- RMI International Travel
- RMI Travel Registry
- Study Abroad Program
- EHS Laboratory Safety

11. APPENDICES

- Step 1 - Field Safety Procedure Pre-Trip Plan Procedure
- Field Safety hazard and Control Library
- Unplanned Wildlife Encounter Risk Matrix
- Field Communication Device Guidance
- Field Safety Emergency Response Library
- Lone Field Worker Emergency ID Armband
- Participant Emergency Information Form
- Field Safety Document Review Team Process and Set up Guide
- Step 3 - Pre-Trip Meeting Procedure
- Step 4 - On-Site Field Activities Procedure
- Daily Briefing Checklist
- Incident Information Collection for 3rd Party Reporting
- Step 5 - Post-Trip Debrief Procedure
- Field Safety Checklist
- Field Safety Standard Flowchart

For more information contact:

Environment, Health and Safety
E-mail | ucsafety@ucalgary.ca
URL | www.ucalgary.ca/safety
University of Calgary
2500 University Drive NW
Calgary, AB, T2N 1N4