

CALIFORNIA STATE UNIVERSITY, FRESNO

POLICIES AND PROCEDURES FOR ACADEMIC OFF-CAMPUS EVENTS

4/18/05

(See RED text for updates made on 9/18/13 – approval pending)

New Policy Coming Soon!

The policies and procedures specified in this document DO NOT apply to the following:

- off-campus individual study ¹;
- events of the auxiliary organizations;
- experience-based learning activities ¹;
- informal activities and meetings of university classes; and
- student club/organization events

All other off-campus events are covered by the policies and procedures below.

POLICY

University sponsored off-campus events are an extension of the university's programs, and therefore are subject to all applicable university policies and procedures as well as federal and state law.

Definitions

An off-campus event is an educationally related activity that involves a group of university students; takes place outside of university property; and is organized by colleges/schools, departments, employees, or organizations of the university.

Examples of off-campus events include: academic field trips, campus-based study abroad programs, conferences or student trips sponsored with university

¹ An off-campus individual study or off-campus experience-based learning activity involves a student, as an individual, who engages in an academic activity, through her or his own initiative or through a course or graduation requirement, that takes place outside of the university property.

During an off-campus individual study or an off-campus experience-based learning activity, the student assumes full responsibility for scheduling and travel arrangements. The faculty and university are involved only in the approval of the assignment, evaluation, and academic credit. Examples of this type of activity may include, but are not limited to, individual study abroad, internships, fieldwork, practicum, professional practice, clinical experience, service-learning or community service course components, non-academic community volunteer work by student organizations or community-based financial aid work-study positions.

money, and co-curricular retreats (such as the Cross Cultural Student Leadership Retreat).

Other examples may include, but are not limited to, geology or biology field trips for lab or other academic learning experiences, debate team trips connected with an academic program, or enology field trips with an academic program, as well as theatrical or choral trips that may be used for class credit.

During an off-campus event, a university employed faculty or staff member may be present to mentor, coach, or teach students.

An event leader is a faculty or staff member who organizes the off-campus event. Prior to the event, the event leader plans the off-campus event, conducts an orientation session, completes the required notification forms, and considers precautionary procedures. During the off-campus event, the event leader carries the Off-Campus Event Emergency Information Forms and, if an emergency occurs, contacts the Campus Police Department and university relations office.

An acting event leader is a student participant in an off-campus event that is designated to assume the duties of an event leader during the off-campus event if the event leader will not actually attend the off-campus event. The Dean's approval is required when an acting event leader is appointed.

Student Responsibilities

Students shall meet the same standards of conduct in all activities associated with university-sponsored off-campus events as those expected of them in their on-campus activities. These standards include all applicable federal, state, and local laws as well as university policies. Students will be held responsible for the consequences of all inappropriate or irresponsible behavior, whether or not such behavior is directly associated with the off-campus event.

Faculty and Staff Responsibilities

Faculty and staff who participate in an off-campus event are expected to adhere to the same standards of conduct in all activities associated with university-sponsored off-campus events as those expected of them in their on-campus activities. These standards include all applicable federal, state, and local laws as well as university policies. During an off-campus event, it is expected that faculty and staff participating in an off-campus event will provide supervision and guidance to all participants, which is appropriate for enabling the students to benefit fully from the educational purpose of the event. The University and/or faculty and staff are not responsible for students when they engage in personal activities at any time, which have no relation to the stated educational purpose of the off-campus event and are not on the event schedule of activities. Examples of such personal activities include: visiting a friend or relative, attending a social activity, going to a theater or restaurant, etc.

Faculty and staff should list all off-campus events required for a class in the course syllabi.

PROCEDURES

The following prescribed courses of action apply to circumstances specific to university-sponsored, off-campus events. They are set forth here for the protection of all participants, as well as for the university itself, and to assure the integrity of university programs and activities. The Academic Dean, Department Chair, faculty and staff involved in a university-sponsored off-campus event shall assume primary responsibility for the implementation of these procedures and for informing all participants of their content and intent.

Planning The Off-Campus Event

1. The event leader should become thoroughly familiar with and follow procedures incorporated in this document and those in Executive Order 715 (See Risk Management Guidelines: Off-campus Activities--Field Trips (Local and Out of State) and Risk Management Guidelines: Off-campus Activities--International Travel).
2. Select the area where the off-campus event is to be held. It is important that the event leaders(s) have first hand knowledge of, or sufficient experience with the geographical area when planning an off-campus event. The event leader should demonstrate sufficient knowledge of the area to the satisfaction of their respective Dean, Chair, or Supervisor.
3. Obtain written approval from Department Chair, Dean, or other appropriate administrative authority for the off-campus event.
4. Select the dates and times that off-campus event is to be offered, arrange for a class space or meeting rooms where necessary.
5. Determine the cost of the off-campus event and communicate the information to the respective department or office and to students.
6. If reimbursement for certain costs is anticipated, contact the Accounting Office for information about appropriate procedures (See Accounting Services Quick Reference Guide To: State Requirements When Traveling On State Business).
7. Reserve campsites, lodgings, boats, cabins, etc., as necessary. If boats will be utilized, please see the Marine Vessel/Small Boat Safety Guidelines.
8. Transportation:

If the university provides transportation, arrange travel with a travel agency or transportation company unless using university vehicles (See Guidelines and Procedures for Driving on State Business). Arrange with the campus cashier for collection of fees.

If the university is providing transportation by a university bus or van, then the drivers must be university employees who have met the requirements to drive on state business (See Use of University and Private Vehicles: Policies and Regulations). The Office of Environmental Health and Safety does not allow the use of fifteen passenger vans due to various Department of Motor Vehicle restrictions. If the university is providing transportation by private charter, event leaders should follow campus policy regarding insurance requirements for and signed agreements with these private charters (For more information, consult risk management and procurement).

Individuals who are not university-related may not travel in university vehicles (owned, rented or chartered) without the written authorization of the Event Leader and appropriate Dean, Chair, or Vice President, or their designee (See Use of University and Private Vehicles: Policies and Regulations).

If the university is not providing transportation, the off-campus event participants must convene at the site. Event leaders should not be involved in planning or supervising travel to off-campus events in private cars.

When the off-campus event will occur in a foreign country, please see Guidelines for Responsibility Study Abroad: Health and Safety.

9. Assure appropriate insurance policies and procedures have been met (See Insurance Definitions and Guidelines).
10. Plan to accommodate students with special needs. The campus American Disabilities Act (ADA) Coordinator and the Office of Services for Students with Disabilities (SSD) are valuable resources for information about appropriate accommodations for students with disabilities.
11. Decide whether an event leader will attend. Decide whether the event leader will be accompanied by another faculty or staff member. If it is decided that the event leader is not going to accompany the students on the event, this decision needs to be approved by the respective Dean, Chair, or Vice-President.
12. Designate and train an acting event leader if it is decided that the event leader will not attend the off-campus event. The acting event leader may be another faculty or staff member or a student who is participating in the off-campus event. If the acting event leader is a student who is

participating in the off-campus event, then he or she must also register with the Department of Human Resources as a university volunteer before the event occurs. Also, the dean's approval is required if an acting event leader is appointed.

13. File the travel itinerary with the Campus Police Department and with the appropriate department or office sponsoring the off-campus event. The itinerary should include travel times and all destinations. If appropriate, identify alternate route, in case an emergency prevents entry into the original destination.
14. Prepare a detailed day-to-day agenda of activities, including health and safety instructions, for all participants (Risk Management Guidelines: Off-campus Activities--International Travel).

Orientation Meeting

All participants must attend at least one orientation meeting prior to departure. In addition to information specific to the department or office sponsoring the event, the event leader should cover the information outlined below.

1. Arrangements for any out-of-country visas, immunizations, and any other necessary documentation.
2. Written briefing of travel and packing tips, medical and health concerns, modes of transportation, hours of departure and return.
3. Health and travel accident insurance policies available to students (Please see Insurance Definitions and Guidelines).
4. Written outline of any course requirements and/or report deadlines.
5. Written itinerary of destinations and dates/times.
6. Written agenda of activities.
7. Written review of foreseeable hazards and safety procedures, emergency preparedness processes, crisis response plan, and emergency phone numbers and contacts.
8. Training for any equipment to be used on the trip.
9. Address expected conduct of faculty, staff and students, addressing such issues as fraternizing, consuming alcohol, activities, and conduct during "free time". Advise participants of the consequences of non-compliance.
10. Straightforward review of alcohol, drug and firearm policy provisions.

11. Background information pertaining to any upcoming cultural “shocks” that students may experience.
12. Review and clearly explain the required forms (next section).
13. Instruct participants to read and complete the required forms. All participants are required to sign the General Release and Waiver of Liability form. In accordance with EO 1062, a student unwilling to accept the associated risks and sign a waiver must be offered an alternate assignment. ~~A legally enrolled student cannot be denied participation in a class field trip if they refuse to sign the General Release and Waiver of Liability Form. If this occurs, read the General Release and Waiver of Liability Form to him/her, and complete it for them, except for their signature. The leader should note on the agreement that the participant chose not to sign the release, that it was read to him/her, and then sign and date the form and file it with the others.~~

Required Forms

1. ~~File a University **Off-Campus Event Notification Form (Form 1)** with the appropriate Dean, Chair, or Vice President, or their designee, at least fifteen (15) working days prior to the scheduled off-campus event.~~
2. ~~File the **General Release and Waiver of Liability Form (Form 2)** with the department office at least five (5) working days before departing for the event. The original must be given to the Campus Police Department prior to the off-campus event.~~
3. ~~The original **Off-Campus Event Emergency Information Form (Form 3)** must be given to the Campus Police Department prior to the off-campus event. The event leader must take copies of each participant’s form to the off-campus event in case of emergency. The originals and copies should be in sealed envelopes, to protect students’ confidentiality and opened only in an emergency.~~
4. ~~**Form 4** must be given to the Campus Police Department prior to departure. Copies should be filed with the department or office sponsoring the event.~~

The following is a summary of the forms and the distribution/retention requirements (items 1 – 6 below added 9/18/13).

- 1) File **Form 1** with the appropriate Dean, Chair, or Vice President, or their designee, at least fifteen (15) working days prior to the scheduled off-campus event.
- 2) Collect a signed **Form 2** and **Form 3** from each trip participant at least five (5) working days before departing for the event.

- 3) File a **trip roster**, copy of **Form 1** and all collected **Forms 2** with the department office at least five (5) working days before departing for the event. The department must retain these copies for one (1) year.
- 4) File a **trip roster**, copy of **Form 1** and all collected **Forms 3** with the University Police Department before departing for the event. The forms should be in a sealed envelope to protect participants' confidentiality and will be opened only in an emergency.
- 5) The event leader must take a **trip roster** and a copy of each participants' **Form 3** to the off-campus event. The forms should be in sealed envelopes to protect participants' confidentiality and will be opened only in an emergency.
- 6) **Form 4** is no longer required.

(If you have any questions, please contact Risk Management at 278-7422).

Repeated off-campus events: If a group will be participating in a series of related off-campus events (i.e., the debate team will attend several debates), then all group members should complete Forms 2 & 3 above only one time. These forms should remain on file throughout the time period in which the series of events occur during the academic year. An Off-Campus Event Notification Form should be submitted for each off-campus event that takes place in the series unless the travel itinerary is exactly the same for each event. If the travel itinerary is exactly the same for each event, then only one Off-Campus Event Notification Form should be submitted with a copy of the travel itinerary attached that indicates each date on which the travel will occur. All members of the group are not required to attend all off-campus events in a series in order to utilize this procedure.

Precautionary Procedures

Faculty and staff participating in off-campus activities should be constantly alert to the health and safety of participants, both through advance planning and while traveling. The Office of Environmental and Safety has resources available to assist in the identification and management of risks and hazards. Accidents and illnesses do occur and unforeseen situations may arise. The following issues should be considered during the planning and implementation of the off-campus event:

1. The event leader and/or acting event leader should be aware of the nearest medical facilities in the areas in which the off-campus event will occur.
2. First Aid training is required for event leaders and/or acting event leaders who will be taking students on trips to locations that are more remote from emergency medical care (General Industry Safety Orders).

3. In order to minimize risks, each event leader should take the appropriate level of care with these guidelines, consistent with their department or office's Injury, Illness and Prevention Plan (IIPP). It is recognized, for example, that some departments may require that individuals with higher levels of emergency medical training, such as an EMT or trainer, accompany a group.
4. The event leader and/or acting event leader should carry a basic first aid kit. Standard first aid kits are available at a modest cost from University Health and Psychological Services. Departments and offices should make such kits available on a checkout basis to leaders for off-campus events.
5. There is limited medical insurance coverage available for students who are injured on campus sponsored field trips within the United States. This coverage is considered supplemental to any other medical insurance to which the student may have access. The coverage is for medical expenses only, and is limited. Medical insurance coverage for international travel is available through the Chancellor's Office. Call the University Risk Manager, in the Office of Environmental Health and Safety for details.

6. Use of Alcoholic Beverages, Drugs and Firearms

Existing campus policies regarding the use of alcoholic beverages (Policy on Campus Use Of Alcoholic Beverages), or drugs and firearms on campus (Code Governing Student Conduct In The California State University) apply to students participating in off-campus events. If the instructional use of firearms or other weapons is deemed necessary to the Off-Campus Event (e.g., ROTC, Wildlife Management), written authorization by the College or School Dean and approved by the Provost, must be attached to the *Off-Campus Event Notification Form* (Form 1). If violations of these policies occur during an Off-Campus Event, the event leader(s) should contact the Campus Police Department for instructions on the appropriate steps to take.

7. Disruptive Off-Campus Event Behavior

Student behavior during an off-campus event is subject to the university's *Policy on Disruptive Classroom Behavior* (Policy on Disruptive Classroom Behavior).

In the event a participant's conduct becomes unlawful and/or disruptive, the student may be removed from the event if it is practical and safe to do so. Upon return to the campus, the Off-Campus Event leader should file a California State University, Fresno *Report of Disruptive Classroom Incident*.

8. It is recommended that a faculty or staff member of each gender accompany the students on the event when participants are male and female. If it is decided that an event leader of each gender is not going to accompany the students on the event, it is recommended that the decision receive the approval of the respective dean or vice-president.

Emergencies During Off-Campus Events

1. Seek the best available medical aid as soon as possible. Call 911, if appropriate. If students are 18 years of age or older, they have the choice of rejecting or accepting medical treatment.
2. Call the Campus Police Department (559) 278-2132 as soon as possible. The Campus Police Department will contact the appropriate campus administrators and those family or friends indicated on the *Off-Campus Event Emergency Information Form* (Form 3).
3. Take photographs, if possible, and if appropriate.
4. Statements should only be made to authorized persons or agencies. These statements should be objective and brief and avoid speculation or faultfinding.
5. Statements to the media should be brief. It is recommended that an event leader or acting event leader state that, "Responsible authorities have been notified. For more information, please contact the University Communications Office at 278-2795."
6. It is recommended that the event leader record, in writing, a description of the circumstances of the emergency. Event leaders should be mindful that written reports may become evidence in any legal proceedings. Thus, in written reports, it is recommended that descriptions be limited to first-hand knowledge of facts and contain names, phone numbers, and statements of all witnesses. Also, descriptions should not contain speculation, particularly as to fault.
7. All information pertaining to the accident is to be used to complete the *Accident Report (Non Vehicle) STD Form 268* (Accident Report - Other Than Motor Vehicle). The form is to be completed by the Off-Campus Event leader and forwarded to the Office of Environmental Health and Safety as soon as practically possible.

If there are any questions regarding this policy, please contact the Office of Environmental Health and Safety (Risk Management) at (559) 278-7422 or the Office of Vice President of Student Affairs at (559) 278- 2541.

List of Relevant Policies and Samples

<i>Risk Management Guidelines: Off-Campus <u>Activities—Field Trips (Local and Out of State)</u></i>
<i>Risk Management Guidelines: Off-Campus Activities—International Travel</i>
<i>Accounting Services Quick Reference Guide To: State Requirements When Traveling On State Business</i>
<i>Marine Vessel/Small Boat Safety Guidelines</i>
<i>Guidelines And Procedures For Driving On State Business</i>
<i>Guidelines For Responsibility Study Abroad: Health and Safety</i>
<i>Insurance Definitions And Guidelines</i>
<i>Use Of University And Private Vehicles: Policies And Regulations</i>
<i>General Industry Safety Orders</i>
<i>Accident Report (Other Than Motor Vehicle)</i>
<i>Policy On Campus Use Of Alcoholic Beverages</i>
<i>Code Governing Student Conduct in The California State University</i>
<i>Policy On Disruptive Classroom Behavior</i>
<i>Off-Campus Event Notification Form</i>
<i>General Release and Waiver of Liability Form</i>
<i>Off-Campus Event Emergency Information Form</i>
<i>Informed Consent for Off-Campus Event Participation Form</i>
<i><u>Accident Report (Non Vehicle)</u></i>
<i>Sample Itinerary</i>

Academic Policy Manual 626; April 18, 2005

Updates made on Sept. 18, 2013 – pending approval

ACADEMIC OFF-CAMPUS EVENT NOTIFICATION FORM

College/School, Department, Program _____

Name of Off-Campus Event _____

Purpose of Off-Campus Event _____

Location of Off-Campus Event _____

Will alcoholic beverages be served? _____ Yes _____ No

Name of Event Leader _____ Assistant(s) _____

Names of all Participants (attach list, include Student ID #)

Date(s) of Event _____ Time of Departure _____ Time of Return _____

(Attach a copy of the event itinerary)

Transportation arrangements (check one)

State Vehicle _____ Rental Vehicle _____ Private Vehicle _____ Other _____

All Off-Campus Event drivers must be University (State) employees. University employee is defined as Faculty, Staff, Student Assistant in a state funded pay status and Volunteer recognized by the University Human Resources Department. Drivers must have taken a University approved defensive driving course, have a valid California Drivers License and have a good driving record. **List Names and California Drivers License Numbers of Off-Campus Event Drivers:**

Name _____ CDL # _____ DD _____

We have reviewed the University Off-Campus Event Policy and understand the duties and responsibility of the participating Off-Campus Event Leader, faculty, staff and students.

Signature, Off-Campus Event Leader

Signature, Dean/Vice President or designee
California State University, Fresno
Off-Campus Event Policy, Form 2

**RELEASE OF LIABILITY, PROMISE NOT TO SUE, ASSUMPTION OF RISK AND
AGREEMENT TO PAY CLAIMS**

Activity: _____

Activity Date(s) and Time(s): _____

Activity Location(s): _____

In consideration for being allowed to participate in this Activity, on behalf of myself and my next of kin, heirs and representatives, I **release from all liability and promise not to sue** the State of California, the Trustees of The California State University, California State University, Fresno, The California State University Association, Inc., and all of said entities' employees, officers, directors, volunteers and agents (collectively "University") from any and all claims, **including claims of the University's negligence**, resulting in any physical or psychological injury (including paralysis and death), illness, damages, or economic or emotional loss I may suffer because of my participation in this Activity, including travel to, from and during the Activity.

I am voluntarily participating in the Activity. I am aware of the risks associated with traveling to/from and participating in this Activity, which include but are not limited to physical or psychological injury, pain suffering, illness, disfigurement, temporary or permanent disability (including paralysis), economic or emotional loss, and/or death. I understand that these injuries or outcomes may arise from my own or other's actions, inaction, or negligence; conditions related to travel; or the condition of the Activity location(s). **Nonetheless, I assume all related risks, both known or unknown to me, of my participation in this Activity, including travel to, from and during the Activity.**

I agree to **hold** the University **harmless** from any and all claims, including attorney's fees or damage to my personal property, that may occur as a result of my participation in this Activity, including travel to, from and during the Activity. If the University incurs any of these types of expenses, I agree to reimburse the University. If I need medical treatment, I agree to be financially responsible for any cost incurred as a result of such treatment. I am aware and understand that I should carry my own health insurance.

I am 18 years or older. **I understand the legal consequences of signing this document, including (a) releasing the University from all liability, (b) promising not to sue the University, (c) and assuming all risks of participating in this Activity, including travel to, from and during the Activity.**

I understand that this document is written to be as broad and inclusive as legally permitted by the State of California. I agree that if any portion is held invalid or unenforceable, I will continue to be bound by the remaining terms.

I have read this document, and I am signing it freely. No other representations concerning the legal effect of this document have been made to me.

Participant Signature: _____

Participant Name (print): _____

Date: _____

If participant is under 18 years of age, or has a legal conservator or guardian:

I am the parent or legal conservator/guardian of the Participant. **I understand the legal consequences of signing this document, including (a) releasing the University from all liability on my and the Participant's behalf, (b) promising not to sue on my and the Participant's behalf, (c) and assuming all risks of the Participant's participation in this Activity, including travel to, from and during the Activity.** I allow Participant to participate in this Activity. I understand that I am responsible for the obligations and acts of Participant as described in this document. I agree to be bound by the terms of this document.

I have read this two-page document, and I am signing it freely. No other representations concerning the legal effect of this document have been made to me.

Signature of Participant's Parent or Legal Guardian/Conservator

Name of Participant's Parent or Legal Guardian/Conservator (Print)

Participant's Name

ACADEMIC OFF-CAMPUS EVENT EMERGENCY INFORMATION FORM

Participant's Name _____ SS# _____
Last First MI

Home Address _____

Telephone _____ Age _____ Birthdate _____

EMERGENCY CONTACT(S) (Names and Phone Numbers)

Name _____ Address _____

Relationship _____ Home Phone # _____ Work Phone # _____

Name _____ Address _____

Relationship _____ Home Phone # _____ Work Phone # _____

Personal Physician's Name _____

Address _____ Phone# _____

I am presently under the following medication _____

I am allergic to the following medication _____

Presently wear contact lenses? _____ Presently wear glasses? _____

Please state any medical conditions that emergency care providers need to be aware of

Do you have health insurance? _____ Policy # _____

Name of Insured (if different from self) _____ Relationship _____

Name of Company _____ Telephone # _____

Address of Company _____

If I need medical treatment arising out of my participation in this activity, I give my consent for the university to release the information on this form to any medical professional.

Signed _____ Date _____
Signature of participant, or parent or legal guardian, if participant is a minor.