


Office of the Vice President for Administrative Affairs

**Date:** May 24, 2017

**cc:** Cabinet  
Jonna J. Lewis  
(all w/ attachments)

**To:** Whitney Fields  
Director  
Institutional Risk & Emergency Management

**From:**   
Danielle Manning  
Vice President for Administrative Affairs  
and Chief Financial Officer

**Subject:** Sub-Delegation of Authority – EXECUTIVE ORDER NO. 1062  
Field Trip Policies and Procedures

Pursuant to Executive Order No. 1062, I am sub-delegating to the Director of Institutional Risk and Emergency Management, the authority to implement and exercise the provisions of said Executive Order subject to the conditions expressed therein. You may sub-delegate this authority as you see appropriate.

(w/attachments)





Office of the President

# Memorandum

**Date:** December 16, 2014

**cc:** Cabinet  
Sharon Reiter  
Jonna J. Lewis  
(all w/ attachments)

**To:** Dr. Marten denBoer  
Provost and Vice President for Academic Affairs

Dr. Steven N. Garcia  
Vice President for Administrative Affairs  
and Chief Financial Officer

**From:**

A handwritten signature in blue ink that reads "J. Michael Ortiz".

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J. Michael Ortiz  
President

**Subject:** Delegation of Authority – EXECUTIVE ORDER NO. 1062  
Field Trip Policy and Procedures

Pursuant to Executive Order No. 1062, I am delegating to both the Provost and Vice President for Academic Affairs and the Vice President for Administrative Affairs, the authority to jointly implement and exercise the provisions of said Executive Order subject to the conditions expressed therein. You may sub-delegate this authority as you see appropriate.

(w/attachments)



THE CALIFORNIA STATE UNIVERSITY  
OFFICE OF THE CHANCELLOR



BAKERSFIELD

CHANNEL ISLANDS

August 23, 2011

CHICO

DOMINGUEZ HILLS

**MEMORANDUM**

EAST BAY

**TO:** CSU Presidents

FRESNO

**FROM:** Charles B. Reed

FULLERTON

Chancellor

HUMBOLDT

**SUBJECT:** Field Trip Policy and Procedures—Executive Order No. 1062

LONG BEACH

LOS ANGELES

Attached is a copy of Executive Order No. 1062, which establishes policy and procedures for campus field trips.

MARITIME ACADEMY

In accordance with policy of the California State University, the campus president has the responsibility for implementing executive orders where applicable and for maintaining the campus repository and index for all executive orders.

MONTEREY BAY

NORTHRIDGE

If you have questions regarding this executive order, please contact the Office of International Programs at (562) 951-4790.

POMONA

SACRAMENTO

CBR/bjc

SAN BERNARDINO

Attachment

SAN DIEGO

c: Executive Staff, Office of the Chancellor

SAN FRANCISCO

SAN JOSÉ

SAN LUIS OBISPO

SAN MARCOS

SONOMA

STANISLAUS



**THE CALIFORNIA STATE UNIVERSITY**  
**Office of the Chancellor**  
**401 Golden Shore**  
**Long Beach, California 90802-4210**  
**(562) 951-4790**

**Executive Order:** 1062  
**Effective Date:** August 23, 2011  
**Supersedes:** No Prior Executive Order  
**Title:** Field Trip Policy and Procedures

This executive order is issued pursuant to the Standing Orders of the Board of Trustees, Section II (a) and (c). Through adoption of the following statement of policy, the California State University recognizes the beneficial educational purpose of field trips and the necessity for policy and procedures designed to maximize the educational experience, mitigate risk to participants and minimize the university's liability exposure.

**I. Purpose**

This policy establishes minimum standards for a campus field trip policy and procedures and delegates responsibility for implementation to the campus president.

**II. Campus President**

The president is delegated the responsibility for the maintenance and oversight of the campus field trip policy, ensure there is a means for future review of the policy, and ensure that it is updated and communicated to faculty and staff at appropriate intervals.

**III. Field Trip Defined**

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. This definition 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.





#### IV. Field Trip Policy – Minimum Requirements

The campus field trip policy must include the following minimum requirements:

- Include a means to identify all courses that involve off-campus field trips.
- Require the use of the approved liability waiver. See Executive Order 1051.
- Ensure student emergency contact information is obtained prior to the field trip. The campus must have emergency contact information readily available.
- Provide students with an instructional agenda, health and safety information, emergency procedures, and the student code of conduct, prior to the field trip.
- Require a pre-trip evaluation. This should include a site visit and the written evaluation should be retained by the qualifying department and available for review. The pre-trip location visit can be bypassed if the campus can demonstrate and document sufficient knowledge of the field trip site. This could be accomplished by review online, published materials, or contacting the site to discuss the visit.
- Include a plan to accommodate students with special needs.
- Provide training for any equipment that may be used on the activity.
- Provide for an alternate assignment for students unwilling to accept the risk of participation.
- Comply with the California State University *Use of University and Private Vehicles Policy Guidelines* and the California State University student travel policy, where applicable. See Executive Order 1041.
- Administer regular reviews to monitor and document compliance with the field trip policy and update requirements as necessary at regular intervals.

The campus has the discretion to amend its field trip policy to include components not addressed above.

#### V. Document Retention

The campus is expected to retain documents related to the field trip consistent with systemwide and campus document retention guidelines. See Executive Order 1031.

It is recommended that the instructional agenda and executed liability waiver be retained together and for a period of one year after the conclusion of the semester/quarter during which the field trip took place. For minors, the documents are to be retained for one year after the minor reaches the age of majority. Electronic copies of the documents are permissible. See technical letter RM 2011-01 and the accompanying *Release of Liability Handbook*.

  
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Charles B. Reed, Chancellor

Date: August 23, 2011

