

Notes from Project and Risk Management Session

Presented by Claire Curry, post-doctoral researcher at University of Manitoba

1. Permits
 - a. Types: federal, state
 - b. Calling is often better than an e-mail to get quick information
 - c. Start early, note required dates (e.g., review times, meeting of review committees can delay getting your permit)
2. Field supplies
 - a. Permit #'s needed to purchase certain types of equipment (e.g., mist nets)
 - b. Organize your needs ASAP
 - c. Purchase ahead of time
3. Field housing
 - a. Secure well in advance of field season
 - b. Clearly lay out the rules to your technicians (who might also be your housemates!)
4. Accounting
 - a. Keep organized by using a spreadsheet, having envelopes for different types of receipts, and take notes in your spreadsheet saying what each receipt is for.
 - b. Make a calendar note for reporting deadlines
 - c. If you don't have a hand in the accounting for you project, it is worthwhile to sit down with you advisor to go over the tasks involved, so that you will be prepared for when you are asked to do it in a future job.
5. Logistics
 - a. Keep a procedures manual! Will help ensure that data collection/entry/other work is standardized from year to year
 - b. Standardized data sheets/protocol for recording data are imperative for ensuring accurate data collection
 - i. Keep a metadata tab in your electronic data entry files that describes every cell of information. Similarly, have an example data sheet with the kind of information that will go in each unique cell.
 - c. Keep a lab notebook for other relevant notes (don't just use a sticky note, you'll be covered in them)
 - d. Photo records are helpful for standardizing procedures
6. In the field and Risks
 - a. Make sure people know where you are! If you get stuck, and your phone dies, and you're ten miles from the nearest road, you're going to want someone to come looking for you. Figure out the best procedure that works for you and your crew.
 - b. Emergency contact info and procedures should be in vehicles or on each person
 - c. Human risks include things like poison ivy, rattlesnakes, West Nile Virus, getting stuck, getting lost, weather factors (e.g., lightning, heat stroke, sunburn)
 - i. Especially think about technicians from other regions—maybe they aren't aware of these risks?
 - d. First aid kits should be available

- e. Make recommendations for appropriate field gear to technicians (e.g., ankle supporting boots better than sandals?)
 - f. Be a model of good and safe behavior
 - g. Respect the land that you're on (consider the risks and benefits of creating giant mud ruts if it's been raining—do you go ahead or come back another day?)
7. People management
- a. Make sure expectations are clear, and understand that some people will need more guidance than other people
 - b. Know your own and your techs strengths and weaknesses
 - c. Be flexible in your training (if one thing doesn't work, try another way)
 - d. Give people positive and constructive feedback, positive feedback will help improve morale
 - e. Group meetings are helpful, and having "milestone" parties (e.g., we caught our 20th bird today!) are helpful and fun, and create a sense of achieving goals in the group
 - f. Ensure that everyone feels comfortable coming to you with any issues that are arising in the field housing/living quarters, especially when it comes to their co-workers.