**Title:** Strategies for managing and leading fieldwork successfully as a graduate student

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# Abstract:

# Introduction

Successfully planning and implementing a data collection field campaign can be fundamental to completing a graduate degree in ecology or other field sciences. However, programs and labs often provide little formal training in the “soft” skills required to manage a field team successfully. Many programs and lab PI’s may not have any formal training themselves, so graduate student training might be haphazard and spotty. Complicating this is the unique nature of fieldwork, with specialized skillsets, work requirements (e.g., hours of work, conditions), and equipment which is not always easy to generalize. While some individuals may enter graduate school with prior experience leading a team, the skills required for managing a field crew in various environments, under high stakes and potentially facing physical risks may differ. Furthermore, for those with little specific experience, this can be daunting. While some resources exist, they can often be highly method-specific (i.e., tree climbing, Houle et al. 2004), deal with a specific aspect of risk (e.g., minority identity individuals, Claire Demery et al. 2021 or physical challenges, Daniels and Lavalleee 2014).

Here, we provide suggestions of strategies specifically aimed at a graduate student audience. Graduate students leading their own field campaign can be in complicated positions of power: they are expected to supervise and lead their field assistants but remain accountable to their advisor and projects.

The COVID-19 pandemic disrupted and often prevented conducting ecological fieldwork, particularly in the summer of 2020 (i.e., Tracy et al. 2020). While unprecedented, disruptions to fieldwork can happen at many scales, and can alter research timelines and degree completion for many graduate students who collect data in the field. While the advice here is not specifically geared at dealing with global pandemics, we believe the strategies and advice compiled here will help graduate students be resilient to such turmoil.

We acknowledge that the advice compiled here may often overlap and may not be applicable to every graduate student. For example, individuals conducting fieldwork in remote areas without cell service may need to respond differently to scenarios than those working in urban environments. We acknowledge such particularities where they arise.

[paragraph recommending labs develop their own policies]

To make this piece as applicable as possible, we report the results of the survey in two formats: 1) general advice, meant to be skimmable, and 2) specific actions to take at various points of the field season, designed to be more applicable to those leading a field season for the first time. We also include a check-list of questions and actions in the supplemental materials, meant to guide labs in establishing their own lab-specific protocols and policies.

# Methods

We developed a 15-30 minute survey to collect advice from both graduate students and supervisors. We distributed the survey first internally among our home department and labs before sending to the Ecolog-listserv.

## Survey questions

* *Background questions*
  + What stage of your research career are you currently in? [Graduate student, faculty member, postdoc]
  + How many years of experience do you have leading a field crew for at least 3 weeks in the field (cumulative) per year?
  + How many years of experience do you have conducting fieldwork not as a team lead?
  + How many years of experience, if any, do you have supervising fieldwork (e.g., as a PI with graduate students who are themselves leading fieldwork)?
  + Where has the majority of your fieldwork experience taken place? [Remote regions, semi-remote (e.g., wildlands near cities), urban areas, a mix of both]
* *Action Questions*
  + **Before the field season**, what are 2-3 specific actions a successful field crew leader takes to promote physical safety?
  + **Before the field season**, what are 2-3 specific actions a successful field crew leader takes to promote safe and productive interpersonal interactions?
  + **During the field season**, what are 2-3 specific actions a successful field crew leader takes to promote physical safety?
  + **During the field season**, what are 2-3 specific actions a successful field crew leader takes to promote safe and productive interpersonal interactions?
  + **After the field season**, are there any actions a successful field crew leader takes?
  + How, if all, do you change your strategy for leading volunteers vs undergrad/grad students gaining experience vs paid assistants?
* *Reflection Questions*
  + Think about a field season you had that was successful. Without giving identifying details and in less than five sentences, what leadership traits and/or actions made it successful?
  + Think about a problematic field experience. Without giving identifying details and in less than five sentences, what made the situation difficult?
  + How have you and your field crew overcome external challenges (i.e., weather, COVID, etc) to have a successful field season?
  + How have you and your field crew overcome internal challenges (i.e., interpersonal dynamics) to have a successful field season?
  + In general, what advice would you give to incoming graduate students leading a field season for the first time?
* *Exit Questions*
  + Are there specific resources (e.g, online) you recommend for new field crew leaders?
  + Are there other strategies to leading fieldwork successfully that you’d like to mention that have not been addressed above?

# Results

*Survey logistic results*

Between DATE and DATE, # individuals completed the survey. % of respondents were graduate students, % were faculty members and % were postdoctoral researchers.

*[some comparison of the strategies suggested by grad students / professors if they differ]*

*Section on urban vs rural fieldwork*

*Section on foreign fieldwork*

*Section on what to do when things go wrong*

## General Advice

* **Prepare individuals for risk**

Fieldwork contains risks from a variety of sources: landscape, weather, wildlife, bystanders and occasionally from other team members. Furthermore, not all members of a fieldcrew are faced with the same source or amount of risk: individuals from minority identities (race/ethnicity, sexual orientation, disability, gender identity, religion) may experience greater conflict or violence from sources external (bystanders, local authorities, etc) or internal (other team members) (Claire Demery et al. 2021). Preparing team members adequately is critical to successfully meeting and managing risks.

The key action required to prepare field assistants fully for potential risks is to talk about them. Acknowledge the risks that exist, and then talk through as a group how the field crew will deal with them if/when they arise. This can feel daunting, particularly in the context of more nebulous sources of risk – it may feel easier for some leads to talk through how to proceed after spotting a bear than how to proceed if a member of the field crew experiences harassment or prejudice, but that makes talking through that risk even more important.

* **Use incentives easily and often**
* **Establish expectations early and often**

## Actionable Advice

[flowchart of before/after/during strategies]

## What to do when things go wrong: Physical

Follow established protocols. Focus on safety first, if necessary. Emergency contacts. Training.

What to do when things go wrong: Interpersonal  
Re-establish communication.

# Conclusions

# Acknowledgements

# References

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