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

Authors: Buma Lab

**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 to no formal training in the “soft” skills required to manage a field team successfully, relying instead on individuals’ potential background experience in leadership or management. While many individuals may enter graduate school with prior experience leading a team, the skills required for managing a field crew in remote environments, under high stakes and facing high 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 involved with fieldwork (Claire Demery et al. 2021) or are aimed at helping supervisors or advisors prepare student mentees (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.

[recommend labs develop their own policies]

**Methods**

We developed a short (>5 minute) survey in order to collect advice from individuals across career stages (Appendix).

**Results**

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

**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.

*Specific suggestions:*

*-*  Introduce scenarios of risk across several categories of risk (i.e., weather, wildlife, harassment) and walk the field crew through what they can expect as a group if the group experiences any of those forms of risk. State explicitly what they can expect from you as a team lead in the event that any of those scenarios arise (i.e., will you be the one to call 911 in the event of an injury? What if you’re incapacitated?)

- Introduce the safety equipment available to the team and make sure everyone knows where it will be stored / how to use it. This is especially important if in a remote location and using satellite phones, etc, but also applies in urban areas – where are the truck/car keys going to be stored while in the field?

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

**Actionable Advice**

**[Graph of before/middle/after surveys]**

**Conclusions**

**Acknowledgements**

**References**

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Tracy, E.E., Teal, C.N., Ingram, S.J., Jenney, C.J., Grant, J.D. and Bonar, S.A., 2021. The Impact of COVID‐19 on Freshwater Fisheries Fieldwork and Data Collection. *Fisheries*.