

Pre-Trip Orientation Checklist

A discussion with new researchers regarding logistics and potential issues prior to travel is essential to establish realistic expectations and a smooth transition to the field environment.

Logistics and itinerary

Accommodations and transportation

Clothing, gear, and other materials that should be packed

• Items that should not be packed

• Items are available or unavailable for purchase for the duration of the trip

Field location conditions

Field site rules and expectations of conduct during travel

Rules for “off-duty” hours

Pre-departure errands

• University deadlines (TAR, class registration, etc.)

• Personal financial arrangements (taxes, bill pay, etc.)

• Recommended academic preparation

Money

• Source (university credit line, personal credit line, cash, traveler's checks, etc.)

• ATM and currency exchange availability

• Credit card use/availability

• Handling payment for hired staff

Passport and visa requirements

How to avoid and manage potential travel mishaps (cancelled flight, missing bags, etc.)

Situations that may contribute to culture shock

Major cultural customs

• Nonverbal behavior (eye contact, gestures, touching, personal space, etc.)

• Dress

• Concerns regarding gender, ethnicity, religion, sexual orientation, and disabilities

• Food/drink rituals

• Taboo subjects/behavior

• Tactics to avoid cultural misunderstandings

Local laws

• Major departures from U.S. law (e.g., In Saudi Arabia it is illegal to drink or possess alcohol.)

• Means of reporting emergencies

• Documentation restrictions (e.g., Will researchers need to have passports at all times?)

• Driving rules and requirements

If foreign language is a concern, common phrases researchers should know