

Donal C. O'Brien, JR. Sanctuary & Audubon Center at Pine Island

Dear prospective or returning researcher:

Enclosed are the forms requesting permission to conduct research at the Pine Island Sanctuary. If you have any questions, please check our website (<http://pineisland.audubon.org>) or email us at pineisland@audubon.org or phone: 252-453-0603. Forms are designed to be filled out in MS Word and submitted as email attachments. They can also be printed, filled out and mailed to the address below.

NEW APPLICATIONS

Please fill out and return

- **Research Application Form**
- **Proposed Research Summary and attachments (including maps and C. V.)**

If Applicable:

- **Application to collect specimens of plants, animals, minerals, or soil.**
- **Housing Application** (Submit at least a month before need as approval depends on space available).

If research is approved, fill out and bring with you on your first research visit to the Sanctuary (for our files):

- **Participant Safety Registration for each individual involved in the project.**
- **Good Conduct Agreement**
- **Copies of state or federal handling/collecting permits.**

APPLICATION RENEWALS

- **Summary of previous year's research**
- **Research application form (if any changes from previous season).**
- **Proposed research summary (if any changes from previous season).**

NOTE: if you are continuing an ongoing study with no changes to protocol, please email or phone us with details of when you plan to be on site. If you will need housing, please fill out a housing application form.

If applicable:

- **Application to collect specimens.**
- **Housing application form.**
- **Updated safety registration for each participant.**

Thank you,

Pine Island Audubon Sanctuary
300 Audubon Drive
Corolla, NC 27927

Research Guidelines and Application Forms

Donal C. O'Brien, JR. Sanctuary & Audubon Center at Pine Island

APPROPRIATE PROJECTS – Pine Island Sanctuary encourages studies on role of soils, fire, water, plants, wildlife, and humans on native ecosystems, especially studies that may lead to better public understanding, appreciation, and management of native barrier island and marsh species and communities. However, not all projects are appropriate for this field station, and the following guidelines will help you decide whether to submit an application for permission, to conduct research. *The ideal research*, in our view: protects the biological integrity of the Sanctuary; informs citizens and leaders of ways to safeguard regional ecological communities and processes; and provides archived data that can be used by future scientists.

GENERAL GUIDELINES

1. All projects must be approved by Director or designee from Audubon (i.e. Research Coordinator) before fieldwork commences. Applications may be reviewed by partnering agencies prior to approval.
2. Researchers are expected to abide by the Sanctuary's guidelines and regulations while on the premises and conduct their projects in accordance with the approved proposal. If requested, researchers are expected to assist staff when emergency conditions exist on the Sanctuary.
3. Audubon has ultimate authority for all activities on the Sanctuary, including research. The Director may halt the project pending an evaluation, discussion, and decision staff and the researcher under the following circumstances: an emergency situation exists; a research activity is having or will have a significant negative impact that was not anticipated during project evaluation; the researcher(s) is/are not fulfilling obligations agreed to in the approved proposal; or a research activity has deviated or is deviating significantly from the proposal.
4. Projects on the Sanctuary should be non- or minimally invasive, with no long-term negative impacts on natural communities or populations, and must be compatible with planned sanctuary management activities.
5. Alterations of an approved study on the Sanctuary must be approved by the Sanctuary Director in advance.
6. Negative impacts on the Sanctuary must be minimized by proper use of vehicles and equipment, and careful selection of study areas, schedules, personnel, and volunteers. The Sanctuary may prohibit activities that might adversely affect any species, communities, or future research.
7. Researchers must provide the Sanctuary with copies of publications, reports, abstracts, etc., relating to the study.
8. The Sanctuary would appreciate copies of field data and notes from the study for archival purposes.
9. The Sanctuary may wish to permanently mark the study plots, transects, or photo points.
10. Audubon must be given proper credit in all published papers relating to research or studies conducted on the Sanctuary.
11. A research permit is good for only 1 year: renewal is contingent upon submission of a 1 page summary of the past year's research activities and an application renewal form, settling of any outstanding debts to the Sanctuary, and receipt of copies of relevant papers or reports published during the previous year.

COLLECTING

1. In general, collection of specimens is discouraged at the Sanctuary. All collecting of plants, animals, rocks, minerals, or parts thereof (living or dead) must be authorized in advance and in writing by the Sanctuary Director. The collections shall be used for scientific or educational purposes only, and shall not be used for commercial profit.
2. In addition to the Sanctuary collection permit, researchers must obtain any necessary state or federal permits prior to collection. Researchers are responsible for knowing what permits are necessary. Note that handling ANY wildlife in the state of North Carolina requires a North Carolina scientific collecting permit or hunting license.
3. Researchers must keep all permits with them when collecting. Researchers should be prepared to educate others as to what, how, and why the collection is taking place, with emphasis on conservation issues. The permittee may be required to furnish an inventory and locality description of the proposed collection and allow examination of the assembled collection.
4. If the population is small (<25 individuals), researchers can only photograph the organism for field documentation. **Never collect one of the last 25 individuals of a Sanctuary population.** Where a voucher is appropriate, researchers should collect only a single individual. Carefully consider the cumulative effect of research and teaching efforts on the population or occurrence.
5. When research requires collection of live plants, use techniques least likely to damage the population of occurrence. The collection preference is: (1) seed (only if abundant), (2) cuttings or plant parts, (3) whole plants. Always leave reproductive or regenerative parts, roots, fruits, tillers or rhizomes of less common species.
6. The Sanctuary expects researchers to care properly for collected specimens. Follow standard specimen preservation and labeling methods. When finished with a specimen, deposit it in the Sanctuary collection, or in a permanent public museum or in the exhibit, study, or type collections or scientific or educational institutions, and inform the Director or Research Coordinator of that location. If collecting under a scientific collection permit, deposit specimens in designated museums or collections.
7. Please do not collect specimens not related to your study. Inform the Director of interesting finds, along with date, time, location, etc.

ENVIRONMENTAL MANIPULATION

Any planned environmental manipulation on the Sanctuary must be described in your Proposed Research Summary (below) and must be approved in advance. Permission to conduct research will be revoked immediately if an unapproved manipulation is begun. Environmental manipulations may be evaluated on a case-by-case basis, considering (discuss needs and any planned manipulations in your Research Proposal):

1. Necessity for conducting the manipulation on the Sanctuary?
2. Potential long-term impacts on the Sanctuary including impacts on other projects.
3. Potential that the manipulation will help restore and safeguard ecosystems in the bioregion.
4. Chemical manipulations are rarely allowed. Chemicals must not be brought onto the Sanctuary unless arrangements have been approved by the Director for proper handling, mixing, and storage, as well as disposal elsewhere. Discuss your needs and planned methods in your Research Proposal.

PUBLIC RELATIONS

Each project principal investigator or field supervisor may be asked write an article for submission to local newspapers, or for use in newsletters, station reports or website describing the research and its significance to the region. The Sanctuary expects every researcher, assistant, or visitor to act in a manner that fosters good public relations for the Sanctuary, for native species, and for the environment.

Research Application

Donal C. O'Brien, JR. Sanctuary & Audubon Center at Pine Island

INSTRUCTIONS FOR APPLYING TO CONDUCT RESEARCH

You must complete and return the **Research Application Form** and **must** attach your **Proposed Research Summary** (no form is provided). Together, these two documents will help us determine if the research is appropriate for the Sanctuary, assist you in more successfully completing your research, and more fairly allocate Sanctuary and facilities to benefit various simultaneously ongoing projects.

Your **Proposed Research Summary** is a 1-3 page document that describes your research in sufficient detail for us to determine if it is appropriate for the Sanctuary. It may be based on a compilation of other documents you have already prepared in planning for your work or in obtaining funds. No form is provided, but we require that you include the following to help us clearly understand your objectives and needs, and the benefit that your work will provide:

- **Objectives and applications of the research** - describe briefly the purpose of the study, and how the results may be used.
- **Study area** -- describe the general study areas; include details of any areas on the Sanctuary.
- **Methods** — describe your methods well enough that another researcher could duplicate your work. State whether (or not) any environmental manipulations or toxic chemicals are anticipated in the field or lab. Provide your desired starting and expected ending dates at the Sanctuary, time period you expect to publish results, and expected publication journals.
- **Previous research at the Sanctuary** — state the subject and dates of any work you previously conducted at the Sanctuary, and the specific citations of any publications arising from this work.

In addition to the Summary, please also attach the following:

- **Site map** — note the anticipated specific location of your proposed research on the Sanctuary. This map must be GPS specific and updated if sites change during your research. The GIS manager at the Audubon can help with this if needed.
- **Curriculum vitae** — provide a current CV for each principal investigator.

If research is approved, please bring along the following for our file on your project.

- **Permits** - attach photocopies of all required state or federal permits, such as bird banding or mammal trapping permits, or indicate that no such permits are required. If animal capture, marking, recapture, or collection of other biotic or abiotic samples are anticipated, fill out a Sanctuary Specimen Collecting Form.
- **Letter(s) of recommendation** - Students must furnish at least one letter of recommendation from an instructor or advisor.

Incomplete proposals may be returned for additions or revisions. We are here to assist with the successful completion of your research. Do not hesitate to ask for assistance or guidance — we will learn from each other. When in doubt, ASK.

Research Application Form

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New

Renewal

Project modification

Preliminary study

Principal Investigator(s) _____

PI contact info:

Affiliation		
Address		
Address		
City	State	Zip code
Phone	Fax	
Cell	Emergency number	
Email	Web page	

Principal field leaders

Name:		
Affiliation		
Address		
Address		
City	State	Zip code
Phone	Fax	
Cell	Emergency number	
Email	Web page	

Name:		
Affiliation		
Address		
Address		
City	State	Zip code
Phone	Fax	
Cell	Emergency number	
Email	Web page	

Number of other field personnel _____

Project Title _____

Two to three sentences that summarize proposed research:

Field duration at the Sanctuary:

Start date (m/d/y) _____ End date _____

Days in field _____

What facilities will you need at the Sanctuary? Please refer to and complete fill out Housing Application

Meeting Rooms (maybe you want to put this on the housing form?)

What chemicals (formaldehyde, etc.) will be used at the Sanctuary?

Will you be collecting any specimens at the Sanctuary?

No Yes (Please fill out the **Sanctuary Specimen collecting form** and attach copies of federal and state collecting permits),

Don't forget to attach your Proposed Research Summary!

Good Conduct Agreement

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Please print, initial, and bring with you on your first visit to the Sanctuary.

In order to live or conduct research on the Sanctuary, I agree that:

Release of Liability Agreement

1. I am in good health and am aware of no physical problem or condition that might hinder my ability to safely conduct field research. Note: any specific health issues must be disclosed in the **Participant Safety Registration**.
2. I am participating at my own risk, and acknowledge that Audubon makes no warranty or representation, express or implied, regarding safety at the Sanctuary. Known hazards include venomous animals and poisonous plants.
3. I release Audubon, its officers, directors, and employees from any and all claims, liabilities, losses, damages, costs, and expenses resulting from any injury to me and anyone else accompanying me or damage to my or their property arising out of my presence at the Sanctuary, or participation in any research or management activity.
4. I will be responsible for any injuries or damage caused by my willful failure or the willful failure of anyone accompanying me to follow instructions, reckless disregard for same or failure to act in a reasonably prudent manner, or because of any inaccurate statements I have made in this release.
5. I will provide the locations of transects or study sites to the Sanctuary management prior to implementation of study. The Sanctuary reserves the right to designate the form of permanent markers.

Initials: _____

Facilities Use Agreement

1. I have read and understand the **General Guidelines** for the Sanctuary; I agree to abide by these guidelines; and I understand that my failure to do so will cause my access to the site to be revoked.
2. I will notify Sanctuary staff of the dates of a visit, and check to make sure facilities are available, no conflicts exist with other projects, and there are no special closures of research sites.
3. I will remove all research materials, including traps, nets, flags, or temporary markers, at the end of my project unless permanent designation of such markers has been approved by the Sanctuary management.
4. I will keep my vehicle on maintained roads, and stay within areas designated on my permit.
5. I will help maintain the cleanliness of common areas (bathrooms, living rooms, kitchen, porch, yard, etc.) and keep all personal items (towels, books, etc.) in my personal area (bicycles do not come inside). I will pay for needed cleaning if I leave my personal area or common areas in less than original cleanliness.
6. I will conserve water and energy by turning off water and energy consuming devices when they are not needed, and will place all recyclables in designated bins, including compost in an outside compost bin. I will limit my disposal of plastic water bottles by refilling containers. I will not use disposable dishes/glasses/flatware.
7. I agree to abide by any additional posted rules.
8. I understand that smoking is not allowed in or near ANY building on the Sanctuary, and if I choose to smoke I will be responsible for proper disposal of all butts, ashes, etc., and for the costs of any damage associated with my decision to smoke.

Initials: _____

Confidentiality Agreement

1. I will not disclose, except to the Sanctuary management and appropriate state or federal agencies, the confidential location(s) of any rare, threatened, or endangered populations, or any archeological sites on the Sanctuary.
2. I may have access to confidential and privileged data, information, or materials obtained through my affiliation with the Sanctuary, such as ongoing or unpublished studies. I shall not divulge any such information to anyone within or outside the Sanctuary not intended to receive such information or materials.
3. I understand and agree that no paperwork, copies, or other reproduction of information of files may be taken out of the Sanctuary offices without express permission of the Sanctuary management.
4. I will not move or remove any other researcher's materials, papers, maps, study sites, information, or any other physical markings for my own or anyone else's benefit.

Initials: _____

Publication Agreement

1. I will provide one unbound copy and one electronic copy of my thesis or dissertation, if conducted partly or entirely on the Sanctuary, plus copies of all publications, including abstracts of posters or presentations, to the Sanctuary.
2. If I am leader of a project on the Sanctuary, I will provide a progress/summary article appropriate for submission to local newspapers upon request, and give the Sanctuary permission to publish or to provide this article to newspapers or newsletters.
3. If I am the leader of a project on the Sanctuary, I will provide a 1 page summary of the previous year's research activity, which will include goals of the field work, methods used, time spend in the field, a brief summary of results, and any significant or unexpected findings. Failure to submit such a summary may preclude future research at the Sanctuary.

Initials: _____

Printed Name of Applicant

Date

Signature of Applicant

Professor or Principal Investigator (print)

(____)_____
Professor's or Pi's telephone

Project Title _____

For office use only Code: Date:

Safety Registration

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To be filled out by every person conducting or assisting with research at the Sanctuary

Please fill out this form and bring it with you on your first day of arrival at the Sanctuary. Thank you.

The Principal Investigator must submit proof of medical and accident insurance for all participants ~ copies of each individual's insurance cards.

Your name	
Your Home Address:	
City: State:	Zip:
Home Phone: ()	Cell Phone: ()

Names of person(s) to contact in an emergency

FIRST:	Relationship:
Daytime phone: ()	Evening phone: ()
SECOND:	Relationship:
Daytime phone: ()	Evening phone: ()

Any known anaphylactic response to snake antivenin serum:

Any known anaphylactic response to antibiotics: _____

Any complicating medical problems or important safety information that could become a problem during field research? _____

(Continue below and on back if necessary).

Principal Investigator: _____

Project Title: _____

PI contact info:

Affiliation	
Daytime Phone	Evening phone
Cell	Emergency number

FIELD LEADER(S) at the Sanctuary _____

For office use only Code: Date:

Specimen Collecting Form

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Please fill out and submit with Research Application

Name of applicant	Date
Address	
Address	
City State Zip	
Collection date From: To:	

Specimens to be collected

Species/Taxa	Number

Need for collecting

Collection area on the Sanctuary (describe area or provide map)

<i>Special conditions or restrictions (to be completed by Sanctuary staff):</i>			
Approved	Denied	by	<u>Date</u>

Please initial or write N/A if not applicable.

I have enclosed copies of relevant state and/or federal collecting permits.

If collecting or handling vertebrates, I agree to abide by the relevant guidelines:

Mammals: "Guidelines for the capture, handling, and care of mammals as approved by the American Society of Mammalogists." J. Mammalogy 79 (4): 1416-1431.

Birds: "Report of committee on use of wild birds in research." Supplement to The Auk 105 (1): Jan. 1988. Amphibians and reptiles: "Guidelines for use of live amphibians and reptiles in field research." Published by the American Society of Ichthyologists and Herpetologists, the Herpetologist's League, and the Society for the Study of Amphibians and Reptiles. August 1987.

For office use only Code: Date:

Housing Application Pine Island Sanctuary

Lodging may include 1913 Hunting lodge bedrooms or Cottages (other facilities may be available; inquire for availability and rates) Cottages are general rented for longer periods, lodge bedrooms shorter. The going rate is \$40.00/night/bed

The Sanctuary provides: clean, comfortable housing, shared bathrooms, fully equipped kitchen, washing machines, and sheets, towels. You must wash/dry/fold and leave these on your bed when you depart or you will be charged an extra \$15.00 for The Sanctuary staff to wash/dry/fold your towels and bedding.

You bring: dishwashing soap. Personal soap (unscented), laundry detergent (unscented), groceries (nearest stores are 3 and 5 Miles away).

Your responsibilities: wash your dishes and keep common areas including kitchen, bathroom, and your room clean. For any night that you are away from the Sanctuary and do not wish to be charged, you must completely clean and vacate your area. Storage space may be available if you will be returning within a week. **Visitors** may stay for brief periods at \$40/night if pre-approved by Director.

A \$60 cleaning and repair deposit is required in advance for those staying longer than five nights. Payment is due monthly and at departure. Research renewal applications will not be approved until all previous bills are paid.

Sorry, no pets or guns allowed.

The Sanctuary has NO housekeeping staff; your cooperation is appreciated and helps keep your costs low!

Housing Application

PI contact info:

Affiliation		
Address		
Address		
City	State	Zip code
Phone	Fax	
Cell	Emergency number	
Email	Web page	

Note: the Principal Investigator will be billed for unnecessary damages or cleaning.

Principal field leaders

Name:		
Affiliation		
Address		
Address		
City	State	Zip code
Phone	Fax	
Cell	Emergency number	
Email	Web page	

Name:		
Affiliation		
Address		
Address		
City	State	1 Zip code
Phone	Fax	
Cell	Emergency number	
Email	Web page	

4. FIRST SEASON'S **REQUESTED HOUSING** for each person (indicate desired roommates): (The second season's housing needs can be established after arrival for the first field season)

Name:	Phone	Email
Arrival date:	Departure date:	

Name:	Phone	Email
Arrival date:	Departure date:	

Name:	Phone	Email
Arrival date:	Departure date:	

Name:	Phone	Email
Arrival date:	Departure date:	

Call the Sanctuary (252-453-0603) at least one week prior to arrival, reconfirming the specific arrival date(s) and names of each person. We will do our best to accommodate your specific needs.

Do not write below this line— put additional information on a similar form (stapled together) or on back

Approval of Research Coordinator: Date: Rate: \$
Method of Payment:
Special conditions:
Change of rate, date, & reason: Discharge, date, & reason

