

RGS-IBG Health and Safety Policy

for Field Based Activities

The Society is directly involved in a variety of field-based activities including fieldwork, field visits, field research and expeditions, ranging from direct delivery, financial support (grants) and the provision of advice and guidance. The Society is committed to ensuring that those who participate in these activities undertake them in a safe and responsible manner.

This document describes the Society's approach to risk management for these field-based activities. This document is referenced in the Society's Risk Register. This approach was first formally approved by Council in March 2015. It is reviewed annually by the Society's Expeditions and Fieldwork Committee to consider whether any updates are needed. A full review and report to Council is undertaken on a three-year basis, aligned with the start of each Presidential appointment. A copy is made available to all staff through the Staff Handbook.

The Society, alongside many other institutions and individuals, has helped promote good practice in health and safety for fieldwork and expeditions for many years, particularly for those in schools, youth settings, in higher education (teaching and research), and undertaking independent scientific expeditions. This good practice, which underpins the Society's approach, is codified in the following standards and guidance:

- [British Standard 8848 \(2014\)](#): a specification for the provision of visits, fieldwork, expeditions, and adventurous activities outside the UK.
- [USHA Guidance on Health and Safety in Fieldwork and Travel](#) (2018): by the Universities Safety and Health Association and the Universities and Colleges Employers' Associations. This identifies good practice in the Higher Education sector and is aligned with BS 8848.
- [OEAP National Guidance](#): developed by the Outdoor Education Advisors Panel (OEAP) that supports Local Authorities, Schools and Academy Groups in England, Wales and Northern Ireland by developing good practice in Off Site Visits, Outdoor Learning and Learning Outside the Classroom.
- [Learning Outside the Classroom \(LOT\) Quality Badge](#): developed by the Council for Learning Outside the Classroom. The Department for Education recommends that schools look for this Badge when choosing external providers of educational visits.

1. The scope of the policy

The policy covers three areas of the Society's field based activities:

1. Field activities organised and delivered by the Society.
2. Field activities where the Society does not organise or deliver the activity but provides support e.g. grants.
3. Advice and guidance (training and resources) provided by RGS-IBG staff members and individuals contracted¹ to provide such work on behalf of the Society.

Examples of each of these activities are included in Appendix A.

Safeguarding of young people and children is overseen by the Society's Education Committee and is covered by a separate policy.

¹ For example, as a trainer or contributor to an event or resource.

2. Basic principles

A key distinction is between those field based activities the Society organises and runs (i.e. for which the Society is the 'Venture Provider'²) and those it supports but are delivered by others (who are the 'Venture Provider').

The Society is the Venture Provider and therefore directly accountable for organising and running only a small number of field based activities each year³. Currently, such activities include:

- a) Field visits undertaken by RGS-IBG regional committees.
- b) Residential summer field classes for A-Level students and trainee teachers.
- c) Other Society courses and workshops which involve an off-site component (e.g. CPD events for teachers, fieldwork elements of GIS day, fieldtrips at the Annual Conference).

Most of the Society's support for fieldwork and expeditions is for activities that are undertaken by other parties – groups and individuals – enabled by funding through the Society's grants programmes and/or drawing on the advice and guidance provided by the Society through training and online resources. In such cases the responsibility for the delivery of the activity and the safety of the participants lies with the organisers, and not with the Society.

When professional advice or guidance on field safety management is provided by the Society's staff or trainers, those who lead the activity are the Venture Providers. For the provision of training, the Society must ensure that the individuals undertaking this work (either staff, contracted or by invitation) are competent to do so and that advice and training given follows best practice (as codified in the guidance above – e.g. BS8848, USHA, OEAP, LOTC).

3. Professional and public liability Insurance for field activities

The Society has insurance cover to defend and, where appropriate, pay out for a claim relating to a death or injury:

1. For any claim arising from a Society representative organising a UK field visit;
2. Death or injury directly arising from advice given by a member of staff or one of its contracted trainers to an overseas expedition company or individual leader/member.

The injury element is covered under the Society's Public Liability section of its Commercial Combined policy, and the advice element is covered under the Professional Indemnity section of its Not-for profit management liability policy. The Society's Finance Director is responsible for oversight and review of the Society's insurance policies.

4. Procedures to be followed

In all cases, the Senior Manager of the team delivering the event or activity is responsible for ensuring the policy and protocols have been followed.

4.1 Field activities organised and delivered by the Society where the Society is the Venture Provider

The Senior Manager responsible will approve the field activity and oversee the completion of appropriate risk assessments by the activity organiser, ensuring adequate documentation. They will be responsible for

² British Standard BS 8848: 2014 defines the Venture Provider as the individual or organization having overall accountability for all aspects, including safety, of the venture provided either on a voluntary basis or in return for payment. This includes any elements contracted to a third-party provider, such as accommodation and travel.

³ If the Society is the Venture Provider, the Society is accountable for all sub-contracted elements (for example, but not limited to venue, transport etc.). Responsibility sits with the Society to make sure, and to be able to demonstrate, that all elements are fit for purpose.

making sure roles and responsibilities of the Society's personnel and any contractors involved in the delivery of the activity are clearly specified. The risk assessment will be signed off the Senior Manager.

Current examples are provided in Appendix B.

4.2 Field based Activities supported by the Society's grants programme

The Society only awards grants to research projects and expeditions which have undergone an appropriate health and safety/risk review aligned with current good practice (as noted above). The Terms and Conditions for all grants state clearly that approval and support is conditional upon receiving all the appropriate approvals and permissions. It is also a requirement of all the Society's grants that insurance is in place before the researcher/team departs for the field project and for the full duration of the field-based activities.

The Society will not fund projects that take place in a country, countries or within an area where the UK Foreign and Commonwealth Office (FCO) advises against all travel (or of the particular type of travel to be engaged in) before departure.

A distinction is made in terms of the process for final sign-off between

1. Projects routed through universities/research organisations/schools which have their own health and safety review and approval procedures (the university/organisation/school take on full responsibility and is the Venture Provider).
2. Those that do not (full responsibility sits with the research team – they are the Venture Provider).

Recipients of most Society grants fall into the first category (see Appendix C).

Expert reviewers for all grants are asked to consider risk and health and safety issues, planning and mitigation, in the context of the project, the team, and the setting of the fieldwork/expedition as part of the standard review of all grant applications. For those projects with (typically) less experienced individuals or teams questions on these topics are raised at interview and/or pursued in detailed follow-up meetings with the Manager of Geography Outdoors and the Grants Officer.

Full copies of documentation providing evidence of institutional approval (health and safety and ethical, if appropriate) for the project to be supported with an RGS-IBG grant, must be submitted to the Grants Officer before the grant is awarded and paid.

For those grants where the individuals/teams are not affiliated with a university/research centre, and there is no institutional approval for Health and Safety, the Society requires the applicants to show sufficient planning for team safety. This includes providing evidence that a suitable and sufficient Risk Assessment and an emergency response plan are in place. These are reviewed by the Manager of Geography Outdoors. Ultimately, though, responsibility sits with the research or expedition team. They are the Venture Provider.

Copies of all risk assessments and ethical reviews are saved in the O: Grants directories for the specific grants. The final terms and conditions forms can be found in the same directories. A model format for a risk assessment is provided on our [safe, responsible and ethical research page](#)⁴.

Appendix C summarises the two different routes for health and safety review before a grant is approved. The Society's Grants programme is overseen by the Head of Research and Higher Education.

4.3 Advice and training provided by RGS-IBG staff members and individuals contracted⁵ to provide such work on behalf of the Society

The Society provides information, advice and guidance to those undertaking expeditions, field research and outdoor learning, primarily but not exclusively via Geography Outdoors: the centre supporting field research, exploration and outdoor learning. This work is overseen by the Head of Education and Outdoor Learning.

The Society is responsible for ensuring that the individuals undertaking this work (either staff or those contracted) are competent to do so. This may be evidenced by their professional qualifications, experience

⁴ <https://www.rgs.org/in-the-field/grants/guidance-for-society-grant-applicants/safe-responsible-and-ethical-research>

⁵ For example, as a trainer or contributor to an event or resource.



or reputation. This is achieved through careful selection, supervision, staff induction and training, and includes the procedures laid out in the Staff Handbook. Feedback and evaluation forms are used to review trainers' performance and to enhance the training provided to delegates.

The Society provides training in Off-Site Safety Management for visits both in the UK and overseas. Affiliated Off-Site Safety Management trainers are required to undertake a one-day training course, and follow a prescribed curriculum for delivery outlined in the *Off-Site Safety Management Trainers Handbook*.

No member of staff is permitted to give advice that the law requires be given by a registered medical professional or regulated by the Financial Services Authority (for example on insurance matters).

Disclaimers are useful to remind participants and those seeking advice, support and guidance from the Society, that they also have a responsibility for their own safety and should check any information provided. However, under UK law, unlike some other countries, they do not absolve the organisers of their responsibilities. Examples of disclaimers on resources are provided in Appendix D.

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Appendix B: Field activities organised and delivered by the Society where the Society is the venture provider

Current examples

B1. Field-visit activities organised by the Society's regional committees

Written guidance on managing field visits is provided by the Society to the Regional Committee members. Field visit notification forms are completed by the organisers (usually members of the local RGS-IBG committee) and sent to the Society's Programmes Manager and in turn approved by the Head of Public Engagement and Communications. Only upon approval can the event be publicised.

Before the field visit takes place, a field-visit risk assessment form is submitted to the Society, and only then can the field visit proceed.

The (1) guidance, (2) notification and (3) risk assessment forms used are available on request and will form Appendix E. Completed forms are archived by the Public Engagement and Communications team.

B2. Off-site and field-based CPD events (adult participants)

These are usually undertaken at (UK based) field centres. The Society's staff select centres with established reputations and those which hold relevant accreditations (e.g. the LOTC quality badge). Plans are drawn up which incorporate the centre's existing health and safety policies and risk review and also cover travel to and from a centre. Training is either provide by Society staff (who have the training / relevant experience for the activity), the Field Centre's staff (with biographies being provide to the Society before training), or an invited expert trainer commissioned by the Society.

The risk assessment is completed by the staff member responsible for the activity and signed off when contracting with a centre by the Head of Education and Outdoor Learning (or other Society SMT as appropriate).

B3. Off-site and field-based CPD events for student participants (<18 years of age)

This follows the procedure above and is completed usually the Educational Professional Support manager. This is signed off by the Head of Education and Outdoor Learning. This must also follow the Society's Safeguarding Policy for working with <18 year olds.

Joining instructions, which young people are required to accept as a condition of attendance, for such courses, also include information about young peoples' behaviour and actions (including in relation to the use and mis-use of alcohol and drugs).

