

FIELDWORK SAFETY

A Resource Briefing on BS8848

The new British Standard BS8848 sets out the operational requirements for organizers of fieldwork activities and student placements abroad. First approved in April 2007 for a 12 month pilot period, the Standard's full title is "A specification for visits, fieldwork, expeditions and adventurous activities outside the UK". The GEES Subject Centre and Experiential Learning CETL are jointly publishing this briefing document now (February 2008) because in a few weeks the BS8848 consultation period will come to an end. For all higher education staff involved with fieldwork overseas it is, therefore, important to consider carefully the merits (or otherwise) of the new Standard and to submit views and comments by 23rd April to Sarah Horsfield, BSI, 389 Chiswick High Road, London W4 4AL. The email address is: sarah.horsfield@bsi-global.com.

These Briefing Notes are intended to raise awareness of the new Standard, to address some basic questions about its scope and content and to encourage colleagues to take part in the consultation exercise. These notes have been prepared by **Shane Winser (Royal Geographical Society with IBG) and Dr Derek France (University of Chester)** who were members of the BS8848 group which oversaw the Standard's preparation. However, this summary provides only a relatively short introduction and is not intended to be comprehensive. Readers are encouraged to use it as a starting point before going on to engage with the full document which is available from the British Standards Institute (BSI) via a PDF download from BSI <http://www.bsi-global.com/BS8848> As a charity, your University or College will be eligible for a discounted rate of £40 (full price £80).

As with all such Standards, compliance with BS 8848 is voluntary. Any organisation, including Universities and FE colleges, that provides visits, fieldwork, expeditions and adventurous activities undertaken for educational, research, training or recreational purposes outside the United Kingdom may claim compliance, providing they meet the requirements of the Standard.

Where it has come from?

BS 8848 was designed and built on existing UK guidance and through wide consultation to create a national Standard that will benchmark current good practice in safety management procedures.

Following earlier feedback by many HE colleagues, there were significant changes in the published Standard compared to the earlier draft. In particular, revisions were made to the clauses relating to lone researchers, the balance of the roles of institutions in providing safety frameworks, and the onus placed on individuals to behave in an appropriate manner.

Why does it matter?

Fieldwork continues to serve as a vital teaching and research strategy across a range of GEES subjects and in some other academic disciplines. It is imperative that Higher Education Institutions (HEIs) take a sensible and systematic approach to risk management, so that academics and students are not discouraged from undertaking work in the field.

BS 8848 is aimed at both those who organise overseas field activities and those who participate. All who understand BS 8848 will be better informed about the risks and safety management procedures that good practice indicates should be in place before any agreement to take part is distributed and signed.

A recent inquiry into the risks to researchers involved in social science research (Bloor *et al.*, 2007) found that many grant holders and PhD supervisors were unaware of formal structures in place to protect researchers. For example, they did not know the details of insurance coverage and did not plan for the costs of researcher safety or conduct risk assessments.

In a nutshell this is what BS8848 is designed to provide - i.e. a comprehensive but simple system to ensure that all participants in fieldwork, be they staff, postgraduates or undergraduates, are aware of the need to conduct risk assessments; are adequately trained and prepared; and are aware of the scope of measures to protect their well-being.

BS 8848 can help minimize risk through:

- Guidance on how to run a safe and well organized overseas venture
- Establishing best practice for organizers
- Helping students recognize whether a venture is safe
- Preparing participants for the risks involved
- Aiming to reduce risk of injury and “near misses”
- Providing clear accountability and defined roles for everyone involved

Who needs to know about it within your institution?

Everyone involved in fieldwork needs to be fully aware of the formal structures that should be in place to ensure safety including risk assessments, adequate training and preparation and the provision of the necessary insurance coverage.

BS 8848 is designed to provide a comprehensive yet simple system to ensure that all participants, be they staff, postgraduates or undergraduate students, are aware of these needs.

It will be of relevance to staff in Higher Education Institutions wishing to use BS 8848 to evaluate their existing fieldwork safety management procedures against the national Standard. It will be of particular interest to University and College Health and Safety Officers, to those who are responsible for fieldwork safety within their department, and to supervisors of students undertaking cultural exchanges, fieldwork projects and placements overseas.

Headline points

Much of the Standard will be familiar, as it builds on and incorporates existing good practice. BS 8848 does not attempt to micro-manage risk assessment and response strategies for specific situations. Rather it lays out a coherent process within which a single “venture provider” takes on responsibility for the entire operation, defining an all-encompassing “risk analysis and management system”.

The contents list for BS8848 (see below) outlines the main 29 sections with their corresponding page number.

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Discussions around the application of BS 8848 in the HE context have raised some important issues, such as:

- The interpretation of the role of the “Venture Provider” (is it the institution or department?),
- The level of in-country support for an incident/emergency (which may, for example, include the contact details of the British Embassy or a more developed support infrastructure)
- The role of third party providers and seeking their compliance with the Standard
- The role of contracts with suppliers and participants
- The appropriate levels of information and competencies which are required for leaders and participants in relation to BS 8848’s relevance to the operational management, including safety, of overseas activities.
- Lone workers
- Staff Downtime/Personal time

Main action points

We would ask institutions to consider the use of the BS 8848 Standard to benchmark existing fieldwork safety management procedures, in all instances where a specification for the provision of fieldwork, visits, expeditions and adventurous activities outside the UK would be appropriate.

The British Standards Institute have committed themselves to review 8848 after one year, alongside their standard five-year review. This allows HE colleagues, and others within an interest in BS8848, to provide an initial review of the Standard as well as a longer term review based on its implementation over a number of years.

Frequently asked questions (FAQs)

See also FAQs on the BSi website

<http://www.bsi-global.com/en/Standards-and-Publications/Industry-Sectors/Services/BS-88482007/FAQs-for-BS-8848/#faq21>

What protection does compliance with the Standard give my organisation?

BS 8848 sets out in clear, unambiguous language, the actions and associated responsibilities essential for the provision of a risk-based safety management system for overseas visits. In so doing, it gives those intending to provide such ventures a

means of objectively verifying that their activities have been organised in accordance with currently accepted good practice.

Compliance with BS 8848 will demonstrate a sensible approach to the safe planning and management of the activity and the self-discipline of making sure that all the important issues have been covered to make an activity as safe as possible for all involved.

How do I become compliant and who audits this?

Copies of BS 8848 are available from the British Standards Institution at www.bsi-global.com/BS8848

BS 8848 is what is termed a specification consisting of a coherent set of absolute requirements for achieving specific outcomes through actions deemed to be in line with currently accepted good practice.

These outcomes must be objectively verifiable from the point of view of 'a third party called upon to verify conformity'. For specifications to fulfill their mandate it is necessary that verification of conformity could be undertaken by either a first party (e.g. the university), a second party (e.g. a student) or an independent third party.

In the HEI context, an internal audit could be carried out by any knowledgeable person within the organisation or a department who can consider the venture objectively and interpret the Standard's requirements in a locally understood and accepted manner.

What is 'informed consent' and how is it interpreted by the Standard?

A significant aspect of the Standard is that of "informed consent". Participants (both supervisors and students) should be enabled to choose what risks they are prepared to accept. The Standard therefore requires providers to inform participants of the risks inherently or deliberately present in a venture and what will be done to manage them.

Consent is not a one-way process and in return for this insight as to the risks they are likely to face, participants should expect to commit to "reasonable behaviour" as a contribution to keeping themselves and others safe.

What is a 'lone worker' and how does the Standard apply to the lone researcher in the field?

A 'lone worker' is a participant who is unaccompanied such as a student on a placement, or a PhD or Masters student working on his or her own. In these cases, BS 8848 requires the Venture Provider to make arrangements for the lone worker to

undertake the roles and responsibilities of venture leader and participant in combination. This in effect gives them greater responsibility for the planning and management of the venture. This means that the HEI's primary responsibility as Venture Provider is to satisfy itself that their student is capable of undertaking lone research, and in this instance responsibility for the management of activities in the field is then delegated to the work of a lone researcher.

Isn't BS 8848 just a charter to sue HE organisations?

British Standards are not statutory instruments. However, if there should ever be circumstances where a participant and the Venture Provider have gone to law over a dispute, British Standards are one of the established sources of reference for judging whether organizations have behaved "reasonably". BS 8848 provides an explicit framework in which institutions can demonstrate good practice.

BS 8848 is only concerned with the safe management of relevant overseas activities and obviously does not discuss questions of academic judgement and the quality of the research undertaken.

How do I obtain a copy?

For your information the full standard is available from BSI, either as hardcopy or PDF download, or via their website www.bsi-global.com/BS8848. The full price is £80. If your University or College is a registered charity, it will be eligible for a discounted rate of £40 obtainable by contacting the BSI shop on 0208 9969001 or by emailing orders@bsigroup.com.

Further reading:

Bloor, M., Fincham, B., and Sampson, H. (2007) Quality (NCRM) Commissioned inquiry into the risk to well-being of researchers in Qualitative Research. ESRC National Centre for Research Methods, Cardiff University.

<http://www.ncrm.ac.uk/research/outputs/publications/documents/CIReport.pdf>

Butler, R. (2007) Rob Butler looks into British Standard 8848. *GeoScientist* 17 (9) 16-17. Available at <http://www.geolsoc.org.uk/gsl/geoscientist/page2616.html>

Couper, P., and Stott, T. (2006) Field safety training for staff in geography, earth and environmental sciences in HE: establishing a framework. *Planet* 16, 4-8. Available at <http://gees.ac.uk/pubs/planet/index.htm#P16>

Neild, T. (2007) Editorial. Safety first or safety cage? *GeoScientist* 17 (9) 2.



Smith, N. (2007) Passport to a safer field trip. Times Higher Educational Supplement. April 20 2007.