

# 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 four-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 \(LOTC\) 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 Society staff members and individuals contracted<sup>1</sup> to provide such work on behalf of the Society.

<sup>1</sup> For example, as a trainer or contributor to an event or resource.

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.

## **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'<sup>2</sup>) and those it supports but are delivered by others (where others 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 year<sup>3</sup>. Currently, such activities include:

- a) Field visits undertaken by the Society's 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 others – 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*

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<sup>2</sup> British Standard BS 8848: 2014 defines the Venture Provider as the individual or organisation 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.

<sup>3</sup> 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.

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## *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, and the point of contact for reporting any incidents and escalating as appropriate within the organization. The Business Continuity Plan, incident communications plan and, depending on the nature of the incident, other risk and incident management policies will be deployed as appropriate. They will be responsible for 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 by 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, Commonwealth and Development Office (FCDO) 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 Managers in the Expeditions and Fieldwork Department 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 a Society 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 Managers in the Expeditions and Fieldwork Department. 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<sup>4</sup>.

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 Director of Research, Education and Professional.

#### *4.3 Advice and training provided by Society staff members and individuals contracted<sup>5</sup> 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 the Managers in the Expeditions and Fieldwork Department. This work is overseen by the Director.

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 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.

CS JM 24/03/2025

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<sup>4</sup> [www.rgs.org/exploration/grants/guidance-for-society-grant-applicants/safe-responsible-and-ethical-research](http://www.rgs.org/exploration/grants/guidance-for-society-grant-applicants/safe-responsible-and-ethical-research)

<sup>5</sup> For example, as a trainer or contributor to an event or resource.

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## **Appendix A: Examples of the Society's current field-based activities (last updated March 2025)**

### *(1) Field activities organised and delivered by the Society*

- Field visits undertaken by the Society's Regional Committees.
- Field-based CPD events for teachers and trainee teachers.
- Alexander Award fieldwork residential courses for A Level students at Field Centres.
- Occasional one day field events and CPD activities for teachers and/or A Level students, such as a data collection exercises in Hyde Park for GIS day.
- Occasional fieldtrips for delegates at the Society's Annual Conference.

### *(2) Field activities where the Society does not organise or deliver the activity but provides support*

- Society's grants programme including:
  - Field research undertaken by university students and staff
  - Independent researchers and expeditions
  - Fieldwork apprentice scheme
  - Frederick Soddy teaching awards

### *(3) Advice and training by Society staff members and individuals contracted to provide such work on behalf of the Society*

- Staff with advisory roles
  - Managers in the Expedition and Fieldwork Department provide advice information and training through face-to-face training and advice, printed and digital activities
  - Grants Officer answers questions for applicants to the Grants programme.
- Field safety training and guidance
  - Members of the Society's Schools team responsible for the organisation of fieldwork CPD for teachers and advice and guidance provided digitally through [www.rgs.org/schools](http://www.rgs.org/schools)
  - Programmes Officer for regional field visits
  - Professional Officer Teaching and Learning resources for Higher Education field practice.
  - Educational Visits Co-ordinator Trainers.
  - Off-Site Safety Management Trainers.
  - External speakers at relevant events e.g. RGS Explore.

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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 Society committee) and sent to the Society's Programmes Officer and in turn approved by Director of Communications and Engagement. 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 guidance for regional committees on organising a field visit and what to do in case of an emergency, are outlined below in Appendix E.

Completed forms are archived by the Programmes 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 provided by Society staff (who have the training / relevant experience for the activity), the Field Centre's staff (with biographies being provided 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 Director of Research, Education and Professional (or other Society senior manager 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 Director of Research, Education and Professional. 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 misuse of alcohol and drugs).

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## Appendix C: Grants Programme - Review of Health and Safety Risk Assessment and Crisis Management Plan

Applications received and reviewed by Grants Officer in consultation with Director of Research, Education and Professional. All applications are checked but the usual pathway for review for each of the grants is either:

*1. Award contingent on appropriate reviews and approval by institution (usually a school, HEI or Research Centre)*

- All Early Career Research Awards
- All undergraduate and postgraduate Awards (including Geographical Fieldwork Grants)
- Senior Research Awards
- Teaching and Learning (including Schools) Awards

*2. Review undertaken by Director of Research, Education and Professional and Expeditions and Fieldwork Manager with appropriate consultation with experts (environments, techniques, locations, etc.)*

- Neville Shulman Challenge Award
- Ran and Ginny Fiennes Award
- Gino Watkins Fund Award

The Journey in Audio programme is a media and communications training workshop and the Society takes no responsibility for the delivery of any subsequent activity nor the safety of the participants.

In all Terms and Conditions for Grant Recipients it is clearly stated that approval and support is conditional upon receiving all the appropriate approvals and permissions.

- The Royal Geographical Society (with the Institute of British Geographers) requires that the research it funds be conducted in an ethical and responsible manner and that recipients fulfil all of their institution's ethical approvals (this is reworded if applicant is not in an Institution).
- Applicants must also adhere to the codes of practice of the Society. The Society's Research Ethics and Code of Practice is included.
- The Society requires that the project/fieldwork embed the health and safety principles of British Standards 8848, the specification for the provision of visits, fieldwork, expeditions and adventurous activities outside the UK\*.
- Full copies of documentation providing evidence of institutional approval (health and safety and ethical, if appropriate) for the project to be supported with a Society grant, must be submitted to the Grants Officer before the grant will be awarded and paid.
- If there are any health and safety related problems in the field, the Society must be notified.
- Insurance must be in place before the researcher departs for the field project.

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**Appendix D: The project Discovering Britain encouraged people to undertake geographical themed walks located in Britain.**

They are made available to members of the public via [www.discoveringbritain.org](http://www.discoveringbritain.org)

This site provides the following disclaimer:

*“Our responsibility to you. Accuracy of information. We make every effort to ensure that the content of our walks and the other information appearing on this website is accurate and up to date. However, errors and omissions do occur, and you should not take the accuracy of the information for granted. None of the material contained in this site is to be relied upon as a statement or representation of fact. On occasions, construction works, weather conditions or other irregular circumstances may affect the walk routes and users may need to find an alternative route. We cannot be held liable for any accident or injury suffered while on one of our walks.”*

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## **Appendix E: Further information about the regional committee field visit activities and the support provided by the Society.**

Regional committees are provided up to date guidance via the [regional committee webpages](#)<sup>6</sup>. This webpage provides links to relevant policies and procedures for organising and running field visits.

Included in this webpage

- Good practice for regional events: field visits
- Example risk assessment
- Example joining instructions to be sent to all delegates prior to the event.

### *Procedure*

1. Regional committees must follow these steps when organising a field visit:
2. Event organiser (committee member) submits their event via the field visit google form at least two weeks before the relevant Bulletin deadline.
3. Programmes Officer downloads PDF version of the google form and sends to Director of Engagement and Communications for review.
4. Director of Engagement and Communications either approves visit or requests further information. The event organiser will be notified of the outcome within seven working days of the Programmes Officer receiving the google form.
5. Once visit is approved, the Programmes Officer will inform the event organiser. The event organiser will need to complete a risk assessment (no later than four weeks prior to the event).
6. The Programmes Officer sends the completed risk assessment to Director of Engagement and Communications for review. (Incomplete or late forms risk the visit being postponed or cancelled.)
7. Director of Engagement and Communications (or if on annual leave, then the Director of Research, Education and Professional) either approves visit, requests further information, or cancels the visit if there are serious safety concerns. The event organiser will be notified of the outcome within seven working days of the Programmes Officer receiving the completed form.
8. In advance of the visit, joining instructions will be sent to all delegates, and delegates should notify [events@rgs.org](mailto:events@rgs.org) of any pre-existing medical conditions that will affect their ability to participate. The Programmes Officer will share any responses with the event organiser to make sure it is still safe for the delegate to participate.
9. On the day of the event, the event organiser should make sure all of the control measures outlined in the risk assessment are fulfilled.
10. After the event, the event organiser should complete the post-event form and share it with their Chair and the Programmes Officer.

### *Guidance for the regions on what to do in case of an emergency*

Regional committees have been provided two guidance documents on how to manage an emergency based on the Society's protocols should an incident occur on a Society-related field-

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<sup>6</sup> [www.rgs.org/members-area/information-for-regional-committees/organising-events/field-visits](http://www.rgs.org/members-area/information-for-regional-committees/organising-events/field-visits)



based activity. These documents are:

- Managing an incident checklist
- Guidance on dealing with unforeseen events (contingency planning)

The checklist document is a step-by-step procedure for the committee member to take with them and follow in-the-field in the event of an incident. They are very short and only contain the essential information needed during an emergency.

The guidance document is designed to inform the committee member in advance on what they will need to know and be aware of when they are faced with an unforeseen event.

After an incident has occurred, the field visit organiser is required to complete an Incident report form and submit this to the Society as soon as possible. The content of this form, and an associated debriefing meeting will be used to ensure that any learning from the incident is implemented.