USHA Universities Safety and Health Association

Higher Education Sector Guidance on Health and Safety in Fieldwork and Travel

Including all offsite visits and travel in the UK and overseas

supporting partners

UCEA UNIVERSITIES & COLLEGES EMPLOYERS ASSOCIATION

HEBCoN Higher Education Business Continuity Network

AMOSSHE The Student Services Organisation

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This document supersedes the 2011 USHA/UCEA document Guidance on Safety in Fieldwork, which has been withdrawn.

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This guidance can be downloaded from the **www.usha.org.uk** website.

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FOREWORD

A healthy and safe environment is an important part of any work and study place, regardless of where that may be. Fieldwork forms a key element of academic teaching and research, enabling our institutions to develop innovative and exciting solutions to a wide variety of problems, issues and intriguing questions.

The approaches and methods used in fieldwork can vary across disciplines and can be carried out in almost all parts of the world. As such the risks associated with fieldwork can be multiple and complex. It is important therefore that any assessment and mitigation of risk is carried out in a sensible, informed and pragmatic way.

Fieldwork is therefore an important aspect of the student experience. This document is to provides guidance and frameworks to enable delivery of the many forms that fieldwork takes that maximises student potential whilst ensuring health and safety.

I would personally like to thank those who have contributed to the production of this guidance and hope that you all find it extremely useful. USHA is very proud to present this document to the sector.

Cathy Day
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1. INTRODUCTION

This document provides a framework for establishing policies and procedures that enable staff, students and other participants in higher education institutions to undertake fieldwork safely. It provides institutions with a way to demonstrate that they are following good practice to manage fieldwork, thereby facilitating fieldwork in even the most remote and challenging of environments and circumstances.

It is aimed at Heads of Institutions and other senior managers responsible for setting policy, at Heads of Departments/Schools, fieldwork leaders and others who may be accountable for the health and safety of staff, students and other participants engaged in fieldwork. It also gives practical advice to other stakeholders, such as academic researchers; students; supervisors of students undertaking independent field research; advisers in health and safety; occupational health advisers and insurance officers.

It supersedes and draws upon previous USHA/UCEA guidance on Safety in Fieldwork (USHA 2011). It includes material from Health and Safety when Working Overseas (USHA 1998). There is separate UCEA/USHA/HEOPS guidance on Health and Safety for the Placement of Higher Education Students (UCEA 2009).

The revised guidance aligns good practice in the Higher Education sector with the British Standard, BS8848: Specification for the provision of visits, fieldwork, expeditions, and adventurous activities outside the United Kingdom ('BS 8848:2007+A1:2009') and PAS 3001:2016 Travelling for Work – Responsibilities of an organization for health and safety and security – Code of practice.

In this guidance, the following pages set out:

- A definition of fieldwork, including offsite visits and travel.
- A framework for managing fieldwork safely.
- A summary of legal liabilities.
- Case studies outlining good practice.
- A list of resources and references for implementing the guidance.

It is stressed that by adopting this guidance it should not be necessary for institutions to increase bureaucracy prior to routine travel. In view of the wider definition of fieldwork, there will be many instances of fieldwork which can be demonstrably assessed as low risk and can therefore be excluded from the majority of the recommendations in this risk-based guide. It is envisaged that each institution will set its own policies and generic rules and exemptions, based around its travel profile and common activities remote from the institution – applying each recommendation only where it is appropriate, and where it would add value.

The format chosen to present the guidance is described below:

Core actions for policy makers and senior managers, and for those supervising or undertaking fieldwork, that relate to the legal duties of an institution. These actions are intended to set a minimum standard of basic compliance.

Where core actions have been identified, the intended audience – those in each institution likely to be given responsibility for their implementation – have been identified by colour-coding as follows:

YELLOW
Institutional level – e.g. the office of the Head of Institution, strategic managers and central policy departments.

GREEN
Fieldwork management – Heads of Schools/ Departments; fieldwork leaders and research supervisors.

BLUE
Fieldwork implementation – fieldwork leaders, supervisors and participants.

Further guidance that either set out ways to give the core actions practical effect, or give advice regarding measures which assist in compliance with the requirements of 'BS8848:2007+A1:2009'. These have also been colour-coded as shown in the table above.

Case studies selected from institutions which have demonstrated successful management of fieldwork health and safety, or to highlight common issues and barriers to successful management.

In addition, the Fieldwork Resources Toolkit, hosted on the USHA website, includes a selection of example checklists and forms that can be adapted to suit the needs of each institution. These resources have been provided by USHA's member institutions to assist others and in order to develop this resource, institutions are encouraged to offer further examples to admin@usha.org.uk.

Legal responsibilities

Criminal Liability
For fieldwork in the UK, with regard to criminal liability under UK health and safety legislation:

- Primary responsibility for the management of health and safety for a member of staff and for any post doctorate researcher or postgraduate student while on fieldwork lies with the institution (under Section 2 (1) of the Health and Safety at Work etc. Act 1974).

- The institution also has a duty in respect of students and non-employees (under Section 3 (1) of the Health and Safety at Work etc. Act 1974 and the Management of Health and Safety at Work Regulations 1999)

- All employees have a responsibility to follow instructions and act sensibly to protect their own health and safety and that of others (as set out in Sections 7 and 8 of the Health and Safety at Work etc. Act 1974). Those holding more senior positions have responsibilities under section 37.

- Under the Corporate Manslaughter and Corporate Homicide Act 2007 an organisation is guilty of the offence of corporate manslaughter (corporate homicide in Scotland) if the way in which its activities are managed or organised by its senior management causes a person's death, and amounts to a gross breach of a relevant duty of care owed by the organisation to the deceased.

Failure to comply with these requirements can have serious consequences for both institutions and individuals. Potential sanctions include fines and imprisonment, and any legal action can result in reputational damage.

Individuals and institutions are also subject to the laws of the countries in which visits take place. Any criminal prosecution or civil action may also be brought in that jurisdiction either independently or as well as in the UK.

Legal opinion on the criminal legislation and its application to overseas fieldwork is included in the Fieldwork Resources Toolkit.

Civil Liabilities
The nature and extent of civil liabilities between the institution and the fieldwork participant, and the nature and extent of their civil liabilities to others, are affected by many factors which can only be resolved in the courts and may depend upon which country's legal system is deemed to have jurisdiction. Civil liabilities are affected by the nature of any agreements between the parties, of any statements made by the parties in advance about what they offer, and by civil law relating to contracts and services.

The aim of the guidance is not merely to protect the institution from any criminal or civil action but to provide an outline of management practices that will help to protect both staff, students and participants, and to ensure that their health, wellbeing and safety are sufficiently considered before, during and after fieldwork.

2. DEFINITION OF FIELDWORK AND GLOSSARY OF TERMS

Definition of fieldwork

For the purposes of this document, fieldwork is defined as:

Any work carried out by staff or students for the purposes of teaching, research or other activities while representing the institution off-site.

This definition will therefore include activities as diverse as attendance at conferences and recruitment fairs, or undertaking social science interviews, as well as activities more traditionally associated with the term fieldwork such as survey/collection work carried out by geologists or biologists.

In view of this range of activities the guidance is targeted not only towards fieldwork involving hazardous activities and locations, but also routine low risk activities away from the institution. It is recognised that, for many institutions, much of the fieldwork defined above is carried out by individuals travelling and working alone. It is envisaged that institutions will wish to reflect this distinction in their own policies and communicate clearly their expectations of fieldworkers in all circumstances that fall under the definition.

Glossary of terms

Abduction
The unlawful abduction or transportation of a person against his or her will. This may be done for reasons of ransom, political and other demands, in furtherance of another crime or with the intention of execution. Abduction, Kidnap, Express Kidnapping and Virtual Kidnapping are all contained within the definition.

Contingency plan
An alternative plan to be put into operation if needed; the 'plan B' that is required to ensure that the fieldwork is able to continue safely in foreseeable circumstances, whether or not emergency plans are invoked.

Down time
Down time can be defined as a period of time, occurring before, after or within the overall duration of the fieldwork, but outside the jurisdiction of the institution.

Due diligence
Due diligence can be used as a legal defence in criminal law if the defendant can prove beyond reasonable doubt that they did everything possible to prevent an act from happening. In this guidance, it is applied in particular to the level of investigation made into the health and safety capability and practice of a third-party provider prior to engaging them or signing a contract.

Dynamic risk assessment
The continuous assessment of risk in unforeseen and/or changing circumstances possibly requiring the implementation of new control measures.

Emergency plan
Plans which are required to respond to an emergency situation. These usually involve immediate action and will be made in order to provide a suitable response to a natural disaster or to a medical or security emergency.

Fieldwork leader
The person with delegated operational responsibility for all aspects of the fieldwork. This term may be applied to a variety of types of fieldwork e.g. taught courses, research and collaborative expeditions.

Fieldwork team
Two or more individuals who are conducting fieldwork to a common purpose. A fieldwork team may or may not have a designated fieldwork leader present during the work.

Home contact
The person in the institution – usually in the School/Department who is involved in, (or has knowledge of) organising the fieldwork – nominated and contactable in an emergency, and for general support (ideally linked into institutional arrangements). The level of knowledge and involvement will be dependent on the level of risk arising from the fieldwork

Independent fieldworker
An individual who is undertaking fieldwork on their own without direct supervision.

Institution
The generic term for organisations in the higher education sector, to which this guidance applies, i.e. Universities and Colleges.

Intrinsic risk
The level of risk or threat inherent in a task or destination, which is accepted or rejected by the institution.

Local contact
The person or organisation who acts in support of the fieldwork in the location of the off-site work.

Participant
An individual who is undertaking fieldwork as part of a supervised group.

Personal time
Personal time can be defined as time when programmed fieldwork activities are not taking place but fieldworkers remain under the general jurisdiction of the institution.

Residual risk
The level of assessed risk remaining after reasonably practicable controls have been implemented, taking account of the level of impact of the hazard or threat, the likelihood of its realisation and the robustness of control measures.

Risk appetite
The amount and type of risk that an organisation is willing to take in order to meet their strategic objectives.

Risk tolerance
The willingness of the organisation to accept or avoid risk.

Supervised fieldwork
Supervised fieldwork is mainly under direct supervision such as taught undergraduate or post-graduate courses. However, there may be instances where fieldworkers are under periods of indirect supervision.

Threat analysis
Threat analysis relates to consideration of security and political threat levels, significant natural hazards and health risks.

3. ROLES AND RESPONSIBILITIES

The responsibility for ensuring that suitable management systems are in place for the safe conduct of fieldwork lies with the institution and ultimately the **Head of Institution**.

The **Head of School**, or equivalent, is responsible for planning fieldwork at broad levels. The **fieldwork leader** or **independent fieldworker** is responsible for planning the fieldwork at detailed levels.

Where Heads of Schools and Departments have been delegated overall responsibility for health and safety in their School or Department, they are required under UK law to "make a suitable and sufficient assessment of (a) the risks to the health and safety of employees, and (b) the risks to the health and safety of persons not in his employment arising out of or in connection with the conduct by him of his undertaking".

It is envisaged that institutions will install processes that allow fieldwork to be authorised at a level appropriate to the risk. The person authorising the fieldwork is responsible for ensuring that due regard has been paid to the health and safety considerations.

Therefore, responsibility for the health and safety of all those engaged in fieldwork lies with the Head of School/Department, or the person with overall authority who approved the fieldwork. They should ensure that fieldwork leaders and supervisors are authorised and competent, and that there is clarity of roles and responsibilities. The Head of School/Department should ensure that the risk assessment of the fieldwork is made and that a safe system of work has been established for all staff, students and other participants. Frequently, the Head will delegate this duty to the member of staff organising or leading the fieldwork, but overall accountability for health and safety cannot be delegated.

If such delegation occurs, then the Head should be satisfied that the fieldwork leader has the personal capability and is competent to lead – especially under possible adverse conditions – and has sufficient awareness of the obligations to those under their supervision. In any case, the Head should ensure that the organisation of the fieldwork meets School/Departmental health and safety criteria, that any accidents that occur are reported, investigated and, if necessary, statutory notifications are made.

The **fieldwork leader** has the task of overall supervision. They should ensure that there is a detailed knowledge and understanding of safety measures and that these have been communicated to the other members of the leadership team and participants and understood by all. They should also, where appropriate:

- Allocate specific supervisory duties.
- Allocate a competent person to lead each sub-group where groups are subdivided during the fieldwork.
- Delegate explicit responsibility to the leader of each sub-group to know the total number and identities of the fieldworkers they are responsible for supervising.

It is important that, during supervised fieldwork, there is a clear command structure within the group. While this structure may be perfectly obvious on most fieldwork, there can be confusion when command passes from the Fieldwork Leader to others, for example a Boat Skipper or a Diving Organiser. When this type of transfer of authority occurs, all members of the party should be kept fully informed.

The fieldwork leader is responsible for ensuring a suitable and sufficient risk assessment is in place and for ensuring that all safety precautions are observed for the duration of the fieldwork. This duty may be passed to other responsible persons (e.g. Boat Skipper) but the overall duty to ensure the safety of the fieldwork remains with the fieldwork leader. In high risk areas such as

quarries, mines, cliffs, on water, or in situations with a foreseeable risk of violence, this may require active monitoring.

The leader of fieldwork assessed as carrying a high level of threat should implement the control measures identified, monitor and review these threats, and alert the institution to any change in the level of threat.

It is the responsibility of the fieldwork leader to ensure that the level of supervision is adequate for any given situation, and to make necessary adjustments to itineraries in the interests of safety, including – where necessary – cessation of an activity. The fieldwork leader should be explicitly empowered by the Head of School/ Department to discharge these responsibilities and also to implement emergency or contingency plans if necessary.

The fieldwork leader is also responsible for ensuring that all instructions issued to participants are comprehensible and appropriate, that control measures identified in risk assessments are implemented in practice and for ensuring that dynamic risk assessments are carried out if necessary.

Independent fieldworkers undertaking solo travel or self-managed fieldwork have a responsibility to take reasonable care in their activities. In practice they will assume many of the duties of the fieldwork leader and therefore some of their responsibilities, which should be agreed in advance with the Head of School/ Department.

It is the responsibility of **participants/members of a fieldwork team** to heed, understand and observe any instruction given to them by a supervisor and to bring any questions or problems, particularly those of understanding, to the attention of their supervisor. Participants should acknowledge their own responsibilities for the health and safety of both themselves and others. The authority and responsibilities of the fieldwork leader, or any other designated supervisor in relation to safety, should be clearly defined and understood by all members of the party. Institutions will need to decide how they deal with participants unwilling to accept that authority: this could include exclusion from the fieldwork.

4. FIELDWORK HEALTH AND SAFETY POLICY AND AUTHORISATION PROCESSES

Each institution is unique with its own set of objectives and values. Each institution therefore needs to develop its own thinking around its appetite and tolerance of risks posed by its off-site activities, for example whether or not to allow fieldwork to a remote area of an unstable country. It is important that such decisions are made systematically, objectively, and at an appropriate level in the institution. This implies that robust escalation processes are in place for activities which pose unusual hazards, or where there are high levels of residual risk.

The institution should convey a sense of the level of intrinsic and/or residual risk that the fieldwork leader, the Head of School/ Department, and the institution respectively are empowered to accept, authorise and/ or escalate to the next level. It is strongly recommended that each institution should articulate their levels of risk appetite and tolerance in the form of a written fieldwork health and safety policy, which covers travel risk, in order to inform such escalation. Such a policy may include, inter alia:

- Security risks and travel to areas of political instability.
- Natural disasters and extreme climates.
- Areas of endemic and epidemic disease.

If an institution would never allow its staff or students to travel to a war zone under any circumstances it should say so; or it may take a view that such extreme risks should be escalated for consideration by senior management on a case-by-case basis. In either position, the process and likely outcomes should be transparent. A suggested checklist of considerations when establishing a fieldwork health and safety policy is given at the end of this Section.

It is important that the Head of School or equivalent is empowered to reject any proposal even if the risk level is beyond their authority to approve. The escalation process should therefore require explicit approvals at all levels. In this way vital information – such as the competency of the leaders (see Section 12) and the value of the research – will be considered, assessed and approved at an appropriate level prior to escalation. It is also vital that such key decisions are made objectively.

Conversely, many instances of fieldwork can be demonstrably assessed as low risk. Each institution should set the scope of its Fieldwork Health and Safety Policy, and should design its approval processes, to reflect this.

Where the fieldwork is within the scope of the institution's Fieldwork Health and Safety Policy, it is useful to adopt a documented risk analysis and management system which includes the following:

- Risk assessment for the fieldwork.
- Threat analysis for the destination and travel.
- Incident management and emergency response plans.
- Accident, incident and near miss reporting.
- Competency and training.
- Robust authorisation and approval processes.
- A review process after fieldwork is completed including the actions in response to review outcomes.

Institutions should also consider whether it is desirable to know where all those travelling on its behalf are.

Further guidance on the detail and application of such a management system is given in the following chapters. These considerations are also

important at an institutional level when designing processes that will capture and evaluate the risks, and that will give clarity around expectations of rejection, approval or escalation.

While the ethics of teaching and research are largely beyond the scope of this guidance and should be considered separately, it is recognised that analyses of fieldwork risk may pose ethical considerations. The risk assessment and approval process may therefore trigger considerations in a parallel ethical approval process and vice-versa.

CORE ACTIONS	FURTHER GUIDANCE
• Develop a Fieldwork Health and Safety Policy (or equivalent) to cover all off-site activities. • Develop clear approval processes, including processes for escalating high or unusual risks for institutional approval. • Ensure all staff involved in the approval process understand and accept their role, powers to refuse and the limits of their approval authority.	• Develop an approval process for all travel, clarifying where a written risk assessment is necessary, and establishing clear rules for known threats in regular destinations. • The level of detail in the policy will be informed by each institution's travel profile. Examples of such considerations are given in the table at the end of this section. • Use "filters" and triggers to allow as much fieldwork as possible to be authorised at the lowest level appropriate to the risk and complexity. • Establish links and boundaries with ethical and other approval processes.
• Assess the competency of fieldwork leaders, and only approve or escalate the proposal if confident they can respond to and control all foreseeable risks. Reassessment may be necessary if there are subsequent changes to the fieldwork leader or team. • Link the approval to a review of the risk assessment where risks are likely to change in the period between approval and departure. It should be understood that the approval may be withdrawn if the risk status changes.	

Case Study – Escalation Processes

A PhD student proposed a tour of study in European and American political centres prior to field research in Somaliland and central and western Afghanistan. The University had well-developed escalation procedures, and the highly detailed proposal was duly considered at institutional senior executive level. The Somaliland fieldwork was accepted, but the Afghan part of the proposal was not approved in its original form. The entire proposal was then rejected by the University via a parallel ethical approval process until further modifications were made. Conditional authorisation was eventually given for limited research in Kabul only, which was subsequently and successfully completed.

This case highlighted the need for transparency of the University's tolerance for risk in relation to travel and fieldwork in order to aid the planning process, and the need to ensure that the institutional ethical and risk approval processes are linked but independent.

Topics for consideration in a Fieldwork Health and Safety Policy	Reference
What is the scope of the policy? ○ Does it include low hazard sedentary work; can any activities be excluded by default? ○ Does it include the European Economic Area? UK travel? ○ Are there separate considerations or are there existing processes surrounding: • One-off travel – To known "safe" destinations e.g. other institutions and established hosts – Into the unknown, e.g. expedition work, marketing, business contacts or new research • Travel as a precursor to contracts or partnerships that will result in regular travel requirements • Regular destinations, e.g. research centres and field bases; or pursuant to contract	**Section 6**
What are the limits of approval authority at each level?	**Section 4**

Topics for consideration in a Fieldwork Health and Safety Policy	Reference
Are there any underpinning principles? For example: ○ Is the policy based on informed consent? If so ○ Is risk to individuals limited by a robust approval process? ○ What is the institution's position if someone refuses to travel despite approval – i.e. gaps in expectations, e.g. lecturers, researchers, staff in marketing or recruitment? ○ Is there a separate mechanism for ethical approval? If so • Does this cover risk? • How will the risk and ethical approval processes be aligned? ○ What is the institution's default position when the UK Government/ FCO advises against • All travel? • All but essential travel?	**Section 5**
When is a written threat analysis required? ○ All fieldwork? ○ Where indicated by FCO, the insurer or other trigger? ○ Prior to tenders, partnerships or collaboration agreements?	**Section 6**
When is a written risk assessment required? ○ Can meetings, conferences etc. be excluded? ○ Visits and collaborative work at other institutions? ○ How will hazardous activities in otherwise low hazard environments be captured?	**Section 7**
What mechanisms are needed to scan information on unstable or volatile destinations, environmental/climatic conditions and health risks in order to ensure good communication and decision-making, e.g. on repatriation?	**Section 6** **Section 7**

Topics for consideration in a Fieldwork Health and Safety Policy	Reference
Insurance / Assistance ○ Is it sufficient for all travellers to all destinations or do key exclusions need to be communicated? ○ What is the position on extensions, stopovers and leisure time? Is this explicit? ○ Are there emergencies for which the institution will self-insure? ○ Is there provision for dedicated medical and security assistance? ○ Does the institution cover others such as spouses, children, emeritus professors?	**Section 9**
Is a policy on kidnap necessary?	**Section 6**
Is there a level of in-country or local support the institution insists on or wishes to offer participants in certain types of fieldwork or travellers to unstable destinations?	**Section 10**
What information sources will be made available and are any expected to be used?	**Section 11**
What mechanism will be in place to facilitate communication during the fieldwork?	**Section 11**
Are there minimum levels of competency, experience, information, instruction or training necessary? ○ For broad classes of destination or risk prevalent in the institutions travel profile? • **Location** – Overseas; rural vs. urban; FCO and insurance advice status • **Traveller** – Novice; experienced; seasoned • **Training** – Briefing; security awareness; hostile environment; survival ○ For certain roles and commonly-undertaken fieldwork tasks?	**Section 12**
Is it necessary to specify minimum first aid cover, supervision ratios etc. for certain fieldwork?	**Section 13**
What is the policy on provision of/payment for immunisations?	**Section 14**

Topics for consideration in a Fieldwork Health and Safety Policy	Reference
Are existing protocols on disclosure and information sharing adequate?	**Section 15**
Is a mechanism for approval of third party providers necessary?	
○ Accommodation?	**Section 16**
○ Catering?	**Section 17**
○ Transport?	**Section 18**
○ Others	**Section 19**
How will the fieldwork be monitored and reviewed?	**Section 21**
THE ABOVE GUIDE IS NOT EXHAUSTIVE	

5. PLANNING

It is vital that all fieldwork is planned sufficiently in advance of the intended departure to allow the institution to consider the proposal in suitable detail and approve it at an appropriate level.

Many Schools/Departments preside over fieldwork that is of itself routine and low risk, and this may necessitate very limited planning, relying in the main on generic risk assessments and procedures developed from within the School/Department or similar. However, all fieldwork is unique and there will be variables that need to be considered for each instance of fieldwork. For example the varying competence of the group; participants' individual special needs; changes to or at the field site; and the introduction of new activities or methods. Equally, Schools/Departments can routinely send or allow participants to travel to remote, hostile or unstable environments, or to carry out work which of itself poses a risk. The effort and detail required in planning fieldwork is largely commensurate with the risks identified. Particular attention should be paid to fieldwork leaders becoming complacent with conducting well established but high risk activities and/or undertaking routine work in unfamiliar or higher risk surroundings.

The purpose of the fieldwork, together with a summary of its associated activities and expected outcomes, should be clearly established at the planning stage. This will provide a context against which the School/Department and the institution can form a view as to whether the expected outcomes are worth the risk. It will also aid in the consideration of financial approval, ethics and other considerations beyond the scope of this guidance.

CORE ACTIONS	FURTHER GUIDANCE
• Foster a culture that expects fieldwork to be planned in advance. • If necessary, integrate institutional protection policies for young persons and vulnerable adults with the Fieldwork Health and Safety Policy.	

• Establish the purpose of the fieldwork and the value of expected outcomes.
• Identify the proposed fieldwork team and as many of the participants and stakeholders as possible at an early stage of planning.
• Identify potential participants including young (under the age of 18) or vulnerable participants' parents as stakeholders.
• Identify all permissions required in advance and ensure they are obtained.
	• For supervised fieldwork establish codes of conduct for participants, including potential disciplinary action.
	• Plan all outline itineraries in advance – at the start of the planning process.
	• Identify all stakeholders, e.g.
	  ○ Sponsors
	  ○ Relatives
	  ○ The responsible persons in organisations providing participants on a voluntary, educational or charitable basis.

CORE ACTIONS	FURTHER GUIDANCE
• Identify any relevant legislation of the country where the fieldwork is taking place. • Empower the fieldwork leader to act in the interest of safety, to change itineraries or abort the fieldwork. (see Section 12)	• Include fieldwork health and safety costs (training, equipment, etc.) when preparing estimates and grant applications. • Develop a procurement plan if specialist equipment or services will be needed. • For supervised fieldwork, where reasonably practicable, a preparatory visit should be made to the field site and an evaluation made of local facilities and services with particular regard to the needs of known or likely participants.

6. THREAT ANALYSIS

A fundamental part of the initial assessment of the safety of any fieldwork activity – either in the UK or overseas – relates to consideration of security and political threat levels, significant natural hazards, and health risks. This should include both the field site/destination and travel considerations. In order to assess these threats the fieldwork leader or independent fieldworker should have access to adequate, up-to-date information. For areas of political unrest this information should be kept under review at all stages both prior to departure, and during the work. The institution's insurance adviser is likely to be a valuable source of information. It may be that insurance availability and cost is a major limiting factor when considering travel to unstable areas.

The threat analysis should be used to inform the risk assessment and influence the planning and authorisation process. For that reason, institutions may wish to link on-going monitoring of high or unusual threat or risk levels to conditions of approval, explicitly requiring reaffirmation of approval following significant change in risk levels.

Ensure that the threat analysis includes a clear articulation of the residual threats inherent to the visit. Detailed control measures ensure, so far as is reasonably practicable, the reduction of the threats identified.

Specific threats of violence arising from the nature of the fieldwork (for example some aspects of social research on contentious topics or with volatile individuals) should also be captured, and controls detailed in the risk assessment process (see Section 7).

CORE ACTIONS	FURTHER GUIDANCE
• Provide guidance on how to obtain advice on political and security threats, natural hazards, environmental/climate concerns and health risks within the Fieldwork Health and Safety Policy (or equivalent).	
• Check travel advice on the UK Foreign and Commonwealth Office website. It provides commentary on travel risk to most parts of the world, and the contact details of UK representatives in country. (Be aware that the UK's Foreign and Commonwealth Office travel advice reflects the Government's ability to deliver consular services, and its advice on threat levels should therefore be read in that context).	• Commercial providers which specialise in the provision of travel risk information can also provide useful advice. • Refer to appropriate sources of information for UK fieldwork if threats are perceived. Travel websites, professional bodies, and wider sources such as the Social Research Association (if relevant) can be particularly useful. • Encourage leaders of groups travelling outside EU to provide a list of participants to the British Consulate together with details of the visit prior to embarking on the fieldwork.

CORE ACTIONS

- Consult more sources of information for less politically stable destinations, or where there is a more complex spread of threats. In-country contacts can provide a useful context against which to evaluate more formal information sources.
- Take account of the experience and the competency of the fieldworkers when carrying out the threat analysis. This will be a critical factor when considering security threats due to specific risks associated with certain destinations such as risks associated with hailing a taxi from certain airports.
- Undertake an analysis of the sensitivities of the nature of the fieldwork being undertaken in the context of the location, (GM field trials and animal research, State policies, gender based violence etc.)

FURTHER GUIDANCE

- Where destinations are found to be unstable, or there are significant cultural differences provide an orientation session for all fieldworkers in that location for the first time.
- Travellers should be encouraged to register with a specialist provider of security, assistance and risk management services.

7. RISK ASSESSMENT

Once an outline plan has been given authorisation to proceed, it will be necessary to consider whether a separate written risk assessment will be required. When considering routine travel arrangements for example, individuals attending business meetings and conferences within the UK, a simple procedure, detailed in the institution's Fieldwork Health and Safety Policy (or equivalent) should be sufficient to control the risk.

Activities requiring detailed written assessments are likely to include supervised off-site courses, research projects overseas and any travel planned for teaching or recruitment in destinations showing instability.

The risk assessment process should be closely integrated with the planning of the fieldwork. Documents should ideally be produced which complement each other rather than duplicate information. Although this guidance document contains advice on a number of specific risk areas in separate sections (security threats, use of equipment, health risks etc.), it is expected that in practice, all the relevant risks should be covered together within one risk assessment document. For some activities, documenting a contingency plan will also be an integral part of the risk assessment process. Where necessary, a contingency plan should include responses to illness, changes to leadership ratios, changes in activities, changes in political stability, events such as extreme weather, transport delays, theft or loss of money or vital equipment.

The fieldwork risk assessment should be undertaken by a competent individual, usually the person responsible for the fieldwork or the fieldwork leader. All aspects of the work should be considered on a thorough and systematic basis. The final risk assessment document should aim to identify and record foreseeable hazards and significant risks associated with the planned activities. It will also include details of the control measures which will be, or have been implemented to reduce these risks to an acceptable level. A hazard checklist to assist with this process is suggested at the end of this section.

The legal requirement to determine whether a risk has been controlled 'so far as is reasonably practicable' should be clearly reflected in the risk assessment protocols in place. In some cases alternative proposals may need to be considered (and possibly financial or other implications calculated) in order to conclude whether this test has been satisfied. Any significant residual risks apparent at the end of this process should be clearly identified in the paperwork. It should be noted that the acceptability of an intrinsic or residual risk will also be judged by each institution taking into account the benefits of the fieldwork. Benefits may be judged in a variety of ways for example the value of the educational experience, the profile of the research proposed or the income potential generated.

In order for the risk assessment to be 'suitable and sufficient', the written assessment should clearly identify what further action needs to be taken before the activity proceeds, how and by whom the actions will be taken, and it should detail the timescale for outstanding action to be completed. Care should be taken to ensure that all strict legal requirements under specific regulations are covered in the risk assessment process. Institutions may wish to develop their own standard templates for fieldwork risk assessment.

It is also likely that an element of dynamic risk assessment will be required to respond to changes in circumstances or new risks. However, dynamic risk assessment should not be a substitute for adequate emergency and contingency planning. If new categories of risk need to be assessed dynamically, these should be referred back via the approval process before the activity proceeds. The findings of dynamic risk assessments should also be

communicated and understood throughout the fieldwork team and a method for achieving this should be established.

When drawing up risk assessments for supervised fieldwork, simply circulating a risk assessment document in advance, detailing the actions to be taken by participants is unlikely to achieve safe practice in isolation. Clear and timely management arrangements should also be in place to facilitate the implementation of suitable controls. A programme of skill development and training may be required in advance of the fieldwork as part of this process. Participant advice, (how to mitigate against sunstroke, dehydration, insect bites etc.) is best placed within a participant information pack or other form of communication which is easy to read and understand and can illustrate some of the reasoning behind the controls in place. Further details are given in Sections 10 and 11.

CORE ACTIONS	FURTHER GUIDANCE
• Communicate the requirements for risk assessment clearly in the institution's Fieldwork Health and Safety Policy (or equivalent). This should include a mechanism for line managers to satisfy themselves that a suitable risk assessment has been completed when one is necessary. • Introduce measures to ensure consistency in standards applied across the institution, for example review completed risk assessments to monitor consistency and to check adherence to institutional policies.	• Take steps to ensure that the valuable knowledge and experience of the fieldworkers (often gained over very many years of travel, organising courses or conducting research) is accurately and comprehensively reflected in documentation and is not lost when staff move on or retire. Coordinate feedback from the review of assessments centrally in order to inform any revisions of policy. This review could be completed at two levels, both at School/Department level, and institutionally. • Implement a system for countersignature of all fieldwork risk assessments as a way of helping to ensure consistency within a School/ Department.
• Ensure that the complexity of the written assessment is proportionate to the perceived level of risk. Where appropriate, contingency plans should be built into risk assessment documentation before fieldwork begins and relate directly to the threat analysis/risks identified. • Ensure that the risk assessment includes risks posed both to those participating in the fieldwork, and to other persons who may be affected. All assessments should record the name of the author and the date it was produced or updated.	• Ensure that the fieldwork leader or the individual responsible for the activity has responsibility for producing the associated risk assessment. • Include within the risk assessment document reference to the sources of information used to inform the risk assessment.

CORE ACTIONS

- Share significant findings of risk assessments with fieldwork participants and ensure they are understood and accepted. An important aspect of this process is that any residual risks associated with the fieldwork should be clearly communicated. Consent is then on an informed basis and expectations of participants will be realistic.
- The risk assessment (and contingency plan, where appropriate) should be revised throughout the fieldwork to ensure that it is always up to date and relevant to changing circumstances.
- Review the risk assessment in the light of any incidents or near misses and record any recommendations or lessons to be learned.

FURTHER GUIDANCE

- For supervised fieldwork engage participants in the process of risk assessment as this can be a useful learning tool. However, the risk assessment produced should be signed off by an employee. Participants could also be encouraged to review risks whilst in the field and suggest safety management strategies.
- Where possible, tie the risk assessment review process into another feedback mechanism such as student feedback.
- Consider ethical and environmental risks and include these issues within the management strategies adopted.

Example Fieldwork Hazard Checklist

Consider hazards associated with:

- Travelling to the destination.
- Travelling around in the vicinity of fieldwork location.
- The specific activity undertaken.
- Threats to personal security from terrorism, crime or aggression from members of the public.
- Equipment (manual handling, defects, failures).
- Unsafe accommodation (fire, carbon monoxide poisoning, electrical safety).
- Extremes of weather (hypothermia, sunstroke, dehydration, frost bite).
- Location (sea or water courses, landslide, rough terrain, work in trenches, avalanche).
- Contact with hazardous flora and fauna.
- A city environment.
- Locations with low infrastructure and support.
- Ill health (prevalence of disease, foodborne illness, distance from Medical Facilities).
- Inadequate or lack of competent supervision.

Example Fieldwork Hazard Checklist

- Lone working.
- Fitness or competence of participants on supervised courses.
- Inherently dangerous activities (climbing, diving, caving).
- Inability to communicate or summon assistance.
- Poor or inappropriate participant behaviour.
- Failure to develop suitable contingency plans.

Case study – Contingency planning

On a 6-day physical geography undergraduate fieldwork based at a field centre in Scotland in late March, heavy snowfall began on the third day rendering roads dangerous or impassable.

There was no separate written contingency plan but staff monitored weather forecasts and discussed contingencies as set out in the written risk assessment for the work which had anticipated the possibility of such conditions, briefing students on likely changes to the schedule.

On day three it was decided not to attempt to use the minibuses; all were properly equipped and clothed for the conditions but normal fieldwork would be difficult while snow continued to fall, so the programme was adapted to provide a local walk in the snow during the morning to view local river features, followed by an adapted classroom exercise based on local data in the afternoon.

A similar procedure was followed on day four.

On day five it stopped snowing and roads were useable with care so fieldwork was resumed using a slightly modified plan (and following an early foray by staff in a minibus to check road conditions).

For days five and six of the work thick snow cover necessitated revised working procedures, and briefings which included risk assessments were given accordingly.

8. INCIDENT AND EMERGENCY RESPONSE PLANNING

Incident Planning
The level and depth of incident planning required will relate directly to the level of risk associated with the fieldwork. Plans should be in place before the fieldwork begins and should, where relevant, cover the following:

- Available support.
- Missing person's procedure.
- Methods for contacting next of kin.
- Civil unrest and natural disasters.
- Medical emergencies and repatriation.
- Financial plan for emergencies.
- Communication strategy.
- Media management plan.

External stakeholders, including partner institutions or third party providers, should be briefed on the incident plan.

Dealing with a medical emergency is a possibility which should be considered for all fieldwork whether supervised or independent. Considerations include the duration of the work, the remoteness of the destination, the fitness of participants, the access to hospital facilities and standards of health care available in the country.

Emergency Response Planning
An emergency is an event that significantly disrupts normal operations, has caused or is likely to cause severe distress or has severe consequences for individuals and the organisation as a whole. It requires out of the ordinary measures to restore order and normality, thus demanding immediate action from senior management. Crises can come in various forms, and include events threatening an organisation's reputation, assets, financial stability or the safety and security of its staff. Like incident planning crisis response planning should take place prior to travel. Crisis or response plans provide valuable guidance and ensure that essential actions are not forgotten in the heat of the moment and the people assigned to respond to the incident are competent.

Civil unrest and incidents of terrorist attacks are becoming more common. It is essential that the risk to fieldwork staff and students is fully assessed. The Foreign and Commonwealth Office and other open source security information should be closely monitored to ensure that the fieldworkers are fully up to date with the threat climate. In the chaos of an emergency or civil unrest individuals may become separated from the main group. Everyone should know exactly what to do and where to go in such a situation. They should not waste time looking for the main group.

Often in a major emergency travel can be restricted. This restriction can be in the form of roadblocks where travel documents are scrutinised through to the closure of all main ports. Be prepared to gather in a safe haven for several days or a few weeks so ensure a credit card with sufficient funds is available for living expenses.

Critical incidents that frequently constitute crises include but are not limited to:

- Abduction, kidnap or hostage-taking.
- Murder or death in suspicious circumstances.
- Incidents causing multiple casualties and requiring urgent response.
- Arrest or detention.
- Other security situations or events causing a high degree of threat to staff.
- Complicated or large-scale evacuation, or medical evacuation ("medevac").

CORE ACTIONS	FURTHER GUIDANCE
• Ensure that the Fieldwork Health and Safety Policy of the institution includes adequate consideration of incident management and emergency planning requirements.	• Put in place a system so that any lessons to be learned, and necessary improvements following any emergency, can be shared throughout the institution if appropriate.
• Ensure that the fieldwork risk assessment includes emergency procedures detailing the availability of medical assistance and first aid. • All fieldwork leaders and supervisors should be aware of the institution's procedures to be followed in the event of an accident or incident to a member of staff or a participant. • There should be a means of summoning help in an emergency. For remote locations, it may be necessary to have a personal location beacon or satellite phone.	• Review access to emergency funds in accordance with the risk assessment. Check the supervisor's capacity to obtain money and consider the provision of an institutional credit card. • Nominate a home contact, preferably from the same School/Department and known to the fieldwork team, who is contactable for advice. Remind leaders of supervised fieldwork (in writing) about information which may be required in an emergency. An example is included in the Fieldwork Resources Toolkit. • The Home Contact arrangement can be supplemented by use of existing institutional emergency response procedures, ideally by making assistance available via a 24/7 on-call institutional number. • Where appropriate nominate a local contact who will be able to provide immediate emergency assistance. Details of the home contact should be shared with the local contact. • Emergency procedures should link to existing institutional procedures as far as possible e.g. in the event of a death.

CORE ACTIONS	FURTHER GUIDANCE
• The fieldwork leader should obtain information on local health care facilities. If additional emergency assistance provision is to be relied upon, contact and implementation details should be included in the emergency plan. • Provide information and specialist training for fieldwork leaders and first aiders as necessary where it is known that participants have particular health needs. For example, if a participant is known to be vulnerable to anaphylactic shock, instruction will be needed in relation to suitable treatment.	• Give all fieldworkers clear documented information on the location and identity of first aid providers. • Where necessary, identify a local or in-country contact that can assist in the case of an emergency. • For supervised fieldwork, provide a copy of the incident and emergency plan to all participants. Where the participant is under 18 years of age or a vulnerable adult, this information should also be provided to the participant's parent or responsible adult. • The fieldwork leader should ensure that those on the fieldwork are supported, for the duration of the work and on their return to the institution, following an incident or emergency. • Provide a list of emergency contact numbers for all fieldworkers. • Where necessary, take standard travel first aid packs as part of the fieldwork equipment. Additional items should also be taken based on risk assessment.

Emergency Management Plans

Emergency Management Plans should be designed to create, maintain and develop organisational ability to respond to and manage a crisis in an adequate manner. For a timely and appropriate response, the plans should be regularly updated, reviewed and simulated.

They should include:

- Definitions and types of crises.
- Notification and reporting procedures.
- Clear and effective decision- making structures.
- Roles, responsibilities and training for the key members of staff.
- Protocols and formats for each possible situation.

Kidnap and Abduction

Whilst the likelihood of an abduction is lower than other threats, the impact to the individual, their family members, the institution and the academic sector as a whole can be enormous.

Dealing with an abduction is possibly the most complex situation that an institution can face. Beyond the clear threat to the abductee, the institution's finances, morale and reputation will be at risk throughout and after the situation. The number of individuals and groups involved in an abduction case can be large, and many will need to be directly engaged, possibly for long periods.

For these reasons, all institutions with a reasonably foreseeable risk should ensure

they have abduction policy statements in place. The extent to which abduction planning is necessary will relate directly to the level of abduction threat. Where locations, or the nature of the research, have an elevated threat of abduction, then an extensive Abduction Protocol should be in place.

Where the risk is foreseeable for institutions the following should be considered:

- How the institution will respond to abductor's demands whether financial or non-financial (ie: not sending researchers to the country again.).
- If the institution will facilitate ransoms and other demands on behalf of others (ie: family, friends, etc.).
- Who the institution will respond on behalf of (staff, students, accompanying family etc.).
- What the priority objectives are for abduction situations these could include:
  - Ensuring the immediate safety, health and security of the abductee
  - Ensuring the abductee's safe and secure release
  - Protecting the reputation of the institution
  - Who would make up the emergency/ crisis management team
  - How the institution will communicate these decisions to relevant stakeholders

In the event of an abduction, senior management should be contacted immediately. Where one exists, the crisis management team should be assembled and if appropriate, advice from specialists should be sought. This should be part of your travel insurance policy cover.

Further guidance and considerations for an abduction protocol can be found in the Tool Kit.

9. INSURANCE

When planning fieldwork it is important to consider insurance requirements from the various perspectives of what could go wrong and who might be adversely affected. It is important to liaise with the person responsible for insurance at the institution to ensure fieldworkers are aware of which insurances the institution provides and which they may need to arrange themselves to ensure the level of cover is adequate. This section provides a brief summary of the insurance generally available for both individuals and institutions that is particularly relevant to fieldwork. All fieldworkers going abroad should have travel insurance. Typically the policy may include:

- Emergency medical or dental expenses.
- 24 hour emergency helpline.
- Search and rescue costs / emergency repatriation.
- Cancellation / curtailment / delay.
- Personal liability.
- Personal accident.
- Loss or damage to equipment / personal effects.
- Kidnap and ransom.

Generally speaking, Institutions will set in place a Travel insurance policy which acts as an umbrella for all travel requirements. It is important to note, however, that policies differ considerably. Some will have hazardous activity exclusions (including sports perceived as dangerous), some will exclude territories against which the FCO advise against travel, some will include incidental holiday travel and many will exclude pre-existing medical conditions. Some policies will exclude travel over a set duration, whether 3, 6, 9 or 12 months. Furthermore, each policy will have a sanctions exclusion, which relates to countries against which the UK, EU and often the US have sanctions which in some (but not all) circumstances could create problems for the Insurer to move funds into the country, even in an emergency.

It is very important that the policy is negotiated in such a way that it meets the recurring needs of the Institution without the need for a stream of bespoke changes for individual trips because, despite being administratively inefficient, this is prone to error if travellers are not aware of the fine print on the policy. It is also more likely to result in travellers relying on personal insurance which may not allow the Institution to adequately discharge its duty of care. Where there are exclusions or conditions relative to cover, the Institution should consider how to communicate those to all potential travellers, except in the case of a 'Kidnap and Ransom' extension to the Travel policy, where non-disclosure conditions might prevent any publicity.

In deciding what should be covered, there are a number of variables such as:

- Whether to restrict cover to employees only, or to extend to students on authorised trips, to visitors and others;
- Is cover restricted to within the UK on specified types of trips?
- Whether cover is time-bound, or if locally-sourced arrangements for extended work abroad might be needed.

Each Institution has a general duty to disclose material facts to its underwriters, and this was extended under the Insurance Act 2015 to a duty to present full and accurate data for the insurer. Whilst central travel logging as an institutional requirement can help institutions discharge these duties, it can also aid in implementing emergency response plans and mitigate against reputation risks in the event of disasters or terrorist attacks. An institution would be advised to engage with a specialist risk mitigation organisation when considering response plans and reputational risk.

Travel insurance is only one facet of the Institution's wider insurance programme, and works in concert with other insurance policies and assistance programmes, all of which should operate worldwide.

CORE ACTIONS	FURTHER GUIDANCE
• The institution should have processes in place to ensure appropriate insurance is in place, whether provided by the Institution or not, and that all participants have adequate travel insurance cover for the duration of the fieldwork.	• The Institution should have processes in place to oversee and identify destinations and activities which are excluded, or territories which have sanctions issues, in order to escalate these to the Insurer for approval or declinature prior to travel. All relevant travellers to be covered by the insurance should be aware of these issues. • Communicate any key exclusions or policy conditions clearly to all travellers and provide an emergency pack that they may take on hard copy and also on mobile devices. Consider placing this information in the cloud so that it is accessible anywhere by anyone with an Institutional login.
• Check that specific fieldwork risks are adequately covered e.g. Hazardous activities, protracted fieldwork, dangerous countries, pre-existing medical conditions. Activities might need to be curtailed or cover extended as appropriate. • Ensure that the risk assessment and any emergency plans reflect the insurer's capabilities overseas. Some insurers provide websites with pre-travel advice including medical facilities/capabilities abroad. Consideration should be given to engaging the services of a specialist medical and travel security assistance provider that will complement the selected insurer. • Make separate insurance arrangements for risks not covered by institutional or individual policies, e.g. most PL and EL policies exclude liability arising from the use of mechanically propelled waterborne vessels or vehicles.	• If in doubt, fieldwork leaders and organisers should liaise with the insurance adviser to check the limit of insurance is adequate e.g. in the US medical costs can be expensive; worldwide, the cost of rescue from remote regions can be significant. • Arrange appropriate institutional travel insurance with a single insurer for all participants on the same fieldwork. It is better to have a single contact for emergency aid rather than 40 separate numbers. • Although not recommended, some Institutions require that participants arrange their own insurance. If this approach is taken, it is essential to gather evidence of this, and if participants fail to provide the necessary information to the institution they should be asked to withdraw. When participants are providing their own cover, they should be advised to check the wording, and particularly the exclusions, to ensure that it meets their requirements. In addition, it is advisable for the institution to maintain an immediately accessible log of individual arrangements, including policy numbers and emergency help-line numbers.

CORE ACTIONS

- Make arrangements for fieldwork leaders and others travelling independently to immediately notify the institution of any incident so that it can assess what action, if any, needs to be taken. A full incident log should be completed. An example is contained in the Fieldwork Resources Toolkit.
- Travel policies may not provide Kidnap and Ransom insurance for higher risk destinations. Check the wording carefully and consider purchase of additional cover.
- Any insurance cover that members of the group are required or recommended to purchase for themselves should be notified to them in writing at the earliest opportunity. (This approach is not recommended – see Further Guidance opposite).

FURTHER GUIDANCE

- Consider provision of private medical insurance for protracted fieldwork or where fieldwork becomes a secondment.
- Review terms and conditions for secondments to check the requirement for medical insurance in the country concerned and also any requirement for Workers' Compensation if the trip extends beyond normal travel.

- Check insurance is in place for stopovers or extensions to fieldwork for personal holidays. If necessary, fieldworkers should arrange separate insurance.
- When driving a vehicle for fieldwork, check that fieldworkers have insurance in place to cover local legal requirements. Many countries have low standard limits for third party injury, very notably the United States, and extended third party cover should be purchased if hiring a vehicle overseas.
- Ensure that equipment is covered whilst being taken on fieldwork. Check policy limits / excesses / conditions and arrange additional insurance if necessary. This may be covered by the Material Damage Policy, but participants should be aware of the cover afforded under each.

- When participants arrange their own travel insurance, beware of inferior cover or willingness to cover territories to which the FCO advise against travel if the institution's insurers will not. Usually, corporate cover will be broader than personal cover. Such cover should also be valid for business purposes.
- When driving a vehicle for fieldwork there are various considerations depending upon who owns the vehicles and the country being visited including:
- When using private vehicles for UK fieldwork – check personal Motor insurance cover has been extended to allow business use including the carriage of passengers where appropriate.

CORE ACTIONS

- Identify any gaps in insurance or risks that are uninsurable but which may have an adverse consequence to the institution or individuals. Ensure that fieldworkers are aware of the gaps and are making an informed decision to travel. Escalate any decision to accept or reject the risk, including self-insurance implications, in accordance with the institution's authorisation process (Section 4).

FURTHER GUIDANCE

- When using the institution's owned/ hired vehicles for fieldwork in the UK or overseas – check that the institution's Motor insurance covers the county being visited. Often they will exclude overseas countries apart from EU and some other European territories. Check also the local legal requirements as some countries require local insurance policies.
- If hiring a vehicle overseas – Check the level of insurance offered as in some countries comprehensive cover is not standard, or they may have low limits of indemnity or have significant excesses. Build this into the risk assessment. Consider purchasing damage waiver cover from the hirer.
- If using, taking abroad, or hiring a minibus, please be aware of the UK (Section 19 Permits and D1 Licensing) and overseas requirements. These should be checked with the Insurance Office.

Case study – Director of university fell seriously ill with appendicitis whilst leading fieldwork in China

The insurer's website advised that in China doctors and hospitals will immediately expect cash payment prior to even emergency treatment. Foreign health insurance plans are not usually accepted and many hospitals do not accept credit cards. Members of the fieldwork team were all staying in a reputable hotel when the fieldwork leader fell ill. The hotel porter was able to take cash from the till, and accompanied the member of staff by taxi to the local hospital. The patient underwent emergency surgery. It took 48 hours before the local hospital would recognise the insurer's authority and transfer the patient to a private room. All fieldworkers were advised of the incident and had copies of their itinerary / travel documents so were able to continue with their plans under modified leadership.

10. EXCHANGE OF INFORMATION

The provision and exchange of clear information is critical for fieldwork both in the UK and overseas. This applies to fieldwork teams, participants on fieldwork and independent fieldworkers. Information ought to be provided sufficiently well in advance of the fieldwork to allow any areas of concern to be raised and addressed. Timely provision of information allows for the purchase of equipment, medical advice to be sought and adherence to the planning and risk assessment requirements mentioned in earlier sections. This is particularly important when responsibilities are split between institutions.

When managers receive clear written information on activities planned by fieldworkers they will be able to seek any further clarification as necessary prior to authorising the fieldwork. When supervised fieldwork participants receive clear written information, the potential for misunderstandings will be minimised and participants will be able to take action to ensure they adhere to requirements.

There is also a need for an audit trail to be established to demonstrate that informed consent is given by fieldworkers to engage in certain (possibly higher risk) activities and to establish clarity for all those with specific roles and responsibilities. This point can be critical when recruiting staff who may need to carry out fieldwork in locations where intrinsic risks are higher. It is also very important when organising supervised fieldwork to locations which do not have immediate access to medical help.

CORE ACTIONS

- Establish a system to allow ready access to itinerary records of all employees and students travelling on institutional business. This system should be underpinned by robust processes to ensure that emergency contact details are current and available.
- For supervised fieldwork establish systems to provide comprehensive information to participants at the earliest opportunity. The information provided should include the control measures for significant risks identified (see Section 7) and any residual risks inherent to the fieldwork.
- Provide all those travelling overseas with requirements for, or details of, existing travel insurance (see Section 9).

FURTHER GUIDANCE

- For supervised fieldwork, develop systems which integrate health and safety information within a participant information pack or joining instructions, rather than in separate documentation.
- For supervised fieldwork, detail a code of conduct and include this as a standard part of the health and safety information. An example of a Code of Conduct is given in the Fieldwork Resources Toolkit.
- Course handbooks and other preparatory information should be clear about what information is to be provided by whom and when.

CORE ACTIONS

- Provide information covering the scope of supervised fieldwork. This should include the times, location and type of work, and should specify any fieldwork that cannot be undertaken without direct supervision.
- Review information frequently, with any changes to itinerary and contact details communicated as appropriate, and confirm final details immediately prior to departure.

FURTHER GUIDANCE

- Leave copies of health and safety documentation, risk assessments and full itineraries with the nominated home contact.
- For supervised fieldwork, request any mandatory information from participants early in the planning process. Ensure all relevant information is received prior to formal booking.
- For supervised fieldwork, keep a log indicating that each participant has received the code of conduct and acted upon the requests made in preparation for the fieldwork, especially if a minimum standard is required for an individual to participate in any of the activities.

Example checklist of information to be provided to participants on supervised fieldwork:

- Full itinerary.
- Explanation of activities to be undertaken.
- Gender mix of leadership team.
- Costs associated with the fieldwork.
- Actions for individuals arising out of the risk assessment.
- Residual risk descriptions.
- Details of training related to any activities to be undertaken on the fieldwork or required due to environmental or security considerations.
- Purchase of safety or specialist clothing and equipment.
- Cultural issues/language training.
- Relevant reading and website research in relation to the location and fieldwork activities to be undertaken.
- Passports, visas and other essential travel documentation.
- Preventative medical treatment against anticipated local hazards, especially any programme of vaccinations required either by the host country or by the health risk assessment.
- Physical fitness appropriate to the demands of the fieldwork, and arrangements for declaring and assessing fitness.

Example checklist of information to be provided to participants on supervised fieldwork:

- In-country orientation training.
- Down time and personal time arrangements.
- Names and addresses of any third-party providers.
- Communication options for their next of kin.
- Insurance cover.
- Accommodation and catering arrangements.
- Transport arrangements and any associated contingencies.
- Code of conduct.
- Home/emergency contact in the School or Department.
- Fieldwork review procedures.

11. COMMUNICATION

Good communication frameworks minimise the possibility that those engaged in fieldwork have overlooked policy requirements or other correspondence. This applies to independent fieldwork and supervised fieldwork.

Requirements for communication extend throughout the duration of the fieldwork and arrangements should be explicitly included in the risk assessment to a detail commensurate with the risk.

Communication in the event of an emergency is a key area to plan, especially when remote locations are included on the itinerary. See Section 8 Emergency Response Planning.

Effective face-to-face communication well in advance of supervised residential fieldwork can be a critical part of ensuring that those about to engage in the fieldwork fully appreciate the type of experience planned. Full discussion of elements such as the type and quality of accommodation, eating arrangements, sleeping arrangements, and the hours of work (as well as any restrictions in place for activities during personal time) can pre-empt mismatches in leader/participant expectation which might lead to disappointment and difficulties with participants whilst on fieldwork.

CORE ACTIONS

- Ensure that there are clear communication frameworks in place for fieldwork leaders to adhere to when planning fieldwork.
- Install a process for implementing institutional emergency response and crisis management plans should an incident occur during fieldwork.

FURTHER GUIDANCE

- Establish a system which will, if required, allow those off-site to log routinely or update details of their whereabouts and changes to contact details. This will also allow contact from the institution in an emergency.
- Establish a procedure to ensure that each home contact nominated for all fieldwork is able to interrogate records should a fieldworker fail to maintain communication as determined by the risk assessment or Fieldwork Health and Safety Policy.
- If contact is to be made through intermediaries, institutions should ensure that these arrangements are robust. This may involve vetting by an independent travel agent who may have been appointed as a corporate approved supplier of travel services.

CORE ACTIONS

- For supervised fieldwork, brief participants regularly on safety management procedures whilst in the field and before any event or activity which requires special control measures.
- Detail reporting-in procedures in the risk assessment, with frequency of communication with the home (or local) contact commensurate with the level of risk. This is particularly important if supervision is to be provided remotely.
- A method for those off-site to communicate with the institution or between groups is a core element of the risk assessment. Independent fieldworkers or fieldwork teams should have access to a mobile and or satellite telephone which work at the location, or some other form of initiating an emergency response.
- Where appropriate, local contacts should be established and details of these left with nominated home contacts and vice-versa.

FURTHER GUIDANCE

- For supervised fieldwork, share written information with participants in a meeting prior to the fieldwork taking place, as groups or as individuals. This should include opportunities for participants to express concerns and anxieties. During this exercise participants can be informed about the communication options which will be available to them and their next of kin during the fieldwork.

Case study – Emergency contact numbers

The insurer's website advised that in China doctors and hospitals will immediately expect cash payment prior to even emergency treatment. Foreign health insurance plans are not usually accepted and many hospitals do not accept credit cards. Members of the fieldwork team were all staying in a reputable hotel when the fieldwork leader fell ill. The hotel porter was able to take cash from the till, and accompanied the member of staff by taxi to the local hospital. The patient underwent emergency surgery. It took 48 hours before the local hospital would recognise the insurer's authority and transfer the patient to a private room. All fieldworkers were advised of the incident and had copies of their itinerary / travel documents so were able to continue with their plans under modified leadership.

12. COMPETENCE

Fieldwork leaders, independent fieldworkers and participants working off-site need to be competent to plan and undertake fieldwork safely. Competence in this context is defined as being not only an appropriate combination of knowledge, experience and qualifications, but also being able to acknowledge one's own limitations.

The Head of School/Department should be satisfied that the fieldwork leader has the personal capability and competence to lead, especially under possible adverse conditions, and has sufficient awareness of their obligations to those under supervision.

It is important to recognise that a leader's and/or fieldworker's competence in an academic subject, or in research techniques, is different from competence in management, leadership, and supervisory skills.

CORE ACTIONS	FURTHER GUIDANCE
• Train fieldwork leaders and independent fieldworkers on the contents and application of the Fieldwork Health and Safety Policy. • Assess the competencies required for leading and/or participating in fieldwork. This analysis may be required as part of both the approval and risk assessment processes.	• Develop in-house or outsource bespoke fieldwork/travel risk courses to ensure that fieldwork leaders have a knowledge and understanding of the risk assessment process. For leaders organising hazardous fieldwork such training should be mandatory. • Training records to be kept on personnel files for an appropriate period.
• Ensure that fieldwork training includes, as a minimum: • The institution's operating procedures. • Implementing the emergency plan. • Risk assessment. • Undertake an assessment of the competence of fieldwork leaders and independent fieldworkers to ensure training is commensurate with the level of risk. The Head of School/Department should not authorise the fieldwork until all gaps have been addressed. • Review training needs for fieldworkers regularly. This can be achieved as part of the annual staff appraisal where such a mechanism exists.	• Include funding requirements for fieldwork health and safety training in departmental plans. Consider the resources and effort required to ensure and maintain competency of fieldworkers and managers. • Inexperienced leaders to start by leading lower risk fieldwork having first shadowed an experienced leader. • Encourage staff to maintain a reflective log of their fieldwork experience which may be used towards evidence of competence. • Deliver training on fieldwork in a coordinated manner, where appropriate including input from health and safety, occupational health, financial, insurance and other relevant advisers, and academic Schools. This establishes the internal mechanisms and policy requirements of the institution.

CORE ACTIONS	FURTHER GUIDANCE
• The quantity, level and range of training required for all fieldworkers and participants should be commensurate with the risks, and be appropriate to enable the safe undertaking of all activities. • During supervised fieldwork put a robust system in place to assess and train participants before allowing any indirectly supervised fieldwork. Proper understanding and an ability to operate incident and emergency protocols should be in place. • For some activities, formal qualifications may have to be sought. Consider if outdoor fieldwork may cross the boundary with hazardous sports, and if competency frameworks are already established (mountain leader training). These frameworks should be followed, if appropriate. • Specify minimum standards of first aid training – generally in institutional first aid and fieldwork health and safety policies – and specifically in the risk assessment if additional skills are needed.	
• Use the risk assessment (undertaken in accordance with Section 7) to assist in the identification of training and induction requirements for fieldworkers. Training should be provided prior to departure where possible, or during the fieldwork if more appropriate to do so.	• Training for fieldwork leaders in group dynamics and stress management may be useful for projects involving long term fieldwork in difficult circumstances.

Examples of training considerations

- Fieldwork planning.
- Induction/orientation.
- Risk assessment including dynamic assessment.
- Assessing third party providers.
- Fitness training.
- Leadership.
- Travel health.
- Behaviour code.
- Team awareness and dynamics.
- Specific equipment as highlighted in the risk analysis and management system.
- Languages.
- Cultural awareness.
- Hostile environments.
- First-aid and preventative medical treatment.
- Specific activity training (diving, climbing, navigation etc.).
- Responding to an incident and emergency.
- Survival, rescue techniques.

Case study – First-aid training requirements

A university has laid down the following minimum requirements for its supervised fieldwork:

- Low risk fieldwork – 1 day Emergency First Aid at Work for at least one staff member.
- High/medium risk fieldwork – 2 people to have Full First Aid at Work training.
- For remote destinations appropriate training e.g. "Far from Help" training course for at least 1 member of the team.
- Take medical personnel for extremely remote destinations where medical assistance is particularly difficult to summons.

NB
If adopting this model, institutions are strongly recommended to define low, medium and high risk and to give examples.

13. SUPERVISION

Many factors need to be considered when assessing the level of supervision required for any particular fieldwork. Supervision requirements will vary tremendously, for example an inexperienced group of first year students will require a higher level of supervision than would be necessary for postgraduate student level.

Factors that should be considered include:

- The nature of the fieldwork.
- The environment and conditions in which the fieldwork takes place.
- The experience of the members of staff in supervisory roles.
- The experience of the group.
- The needs of individuals taking into account their age, level of maturity, and any individual special needs.
- The external requirements of regulatory authorities or bodies

Two levels of supervision can be identified – direct and indirect:

- Direct supervision describes where a member of staff is in charge of the participant(s) at all times and is able to immediately intervene in person if necessary. This type of supervision is appropriate for high risk activities or for less experienced participants.
- Indirect supervision describes a situation where the member of staff manages the fieldwork but would be unable to intervene in person immediately. Examples of this type of supervision may include individual research projects, lone working, postgraduate research project fieldwork, and participants working together in group activities or social activities.

It is important to consider the arrangements for supervising personal and down time during fieldwork and how the arrangements are to be communicated to participants.

Personal time can be defined as time when programmed fieldwork activities are not taking place but fieldworkers remain under the general jurisdiction of the institution. It is unlikely that fieldworkers will be directly supervised during these periods. Common examples of personal time activities include sightseeing, social activities and outings. Sanctions may be appropriate if the established arrangements for personal time are not complied with.

Down time can be defined as a period of time, occurring before, after or within the overall duration of the fieldwork but outside the jurisdiction of the institution.

CORE ACTIONS

- Each institution should determine its own policy in relation to personal and down time, for example regarding time-keeping, or for dangerous or uninsured activities. Any rules should be effectively communicated to all participants, together with relevant sanctions.

FURTHER GUIDANCE

- Ensure there is appropriate cross referencing with institutional student disciplinary regulations.
- Consider how disciplinary and capability procedures might be applied to issues concerning staff whilst offsite.

CORE ACTIONS

- Any fieldwork which involves participants who are under the age of 18 or classified as vulnerable adults must comply with legal requirements and the institutions Safeguarding policy.

- Assess the risks arising from the fieldwork activity to determine the type and level of supervision required to secure the health and safety of participants.
- Identify any lone working during risk assessment and specifically include lone working arrangements in relevant plans at all stages. Independent fieldworkers should have some form of supervision, the level of which would be dependent upon the risk. The level of indirect supervision should be agreed by the supervisor and participant prior to the fieldwork commencing. Section 11 refers to communication strategies.
- Monitor the activity during and after the fieldwork to ensure that adequate levels of supervision are maintained. (See Section 13)
- For supervised fieldwork identify the extent of any proposed down time and communicate to the participants prior to any commitment to participate far enough in advance of the fieldwork to allow participants to plan.
- Take into account the age of or any special needs of the participants in the management of personal or down time.

FURTHER GUIDANCE

- If down time is permitted during the course of fieldwork, consider insurance implications, reputational risks and supervisory resources.

- Communicate the details of personal and down time to all participants face-to-face prior to the fieldwork. This allows any questions to be answered immediately.
- For undergraduate programmes, consider –
  - The gender mix of the team and leadership.
  - Whether the leadership is chosen from the institution or outside. Competent supervisors may be used from other institutions, with their roles and responsibilities clarified in writing.
  - The implications of using family members or friends as part of the fieldwork team or its leadership.
- Undergraduate programmes the leadership team should, so far as possible, be chosen from within the institution.
- The use of family members or friends as part of the fieldwork team should be avoided. Competent supervisors may be used from other institutions, with their roles and responsibilities clarified in writing.
- Minimise the amount of down time during undergraduate fieldwork. Social activities can be managed within personal time. It is prudent to note that if a serious injury or death occurred during down time whilst sporting it is unlikely that any distinction would be made by the media: the incident would still be linked to the institution in the eyes of the public.

CORE ACTIONS

- Put in place adequate supervisor deputising arrangements to maintain effective levels of supervision if, for example, the party splits into smaller groups.
- Ensure that contingency plans have considered the impact of losing a supervisor due to illness or being tied up with a difficult issue.
- Assess and train participants before allowing any indirectly supervised fieldwork.
- It is the responsibility of the fieldwork leader to ensure that the level of supervision is adequate for any given situation and to make necessary adjustments to itineraries in the interests of safety, including cessation of an activity. The leader should be explicitly empowered to do so.

FURTHER GUIDANCE

- For indirect supervision, agree a schedule of communication between fieldwork leaders or supervisors and fieldworkers.

Case study – Supervision of a community research project in the UK

The fieldwork involved a student interviewing, in their own homes, women who had previously been subject to domestic abuse. Prior to the research being approved a risk assessment was completed outlining the control measures necessary to enable the work to be completed by the student working alone under indirect supervision. The control measures comprised:

- The student undergoing refresher training in interviewing techniques and effective research methods, positive body language, cultural norms and effective methods to terminate an interview.
- Ensuring that the risk assessment was documented and that it contained details of the reasons why the researcher felt it essential to interview participants in their own homes, and the benefits of lone working to the quality of the responses.
- Approval of the interview questions and content by the supervisor prior to any visits.
- Assessing the competency of the student to deal effectively with all eventualities and to initiate the agreed emergency procedures if necessary.
- Gathering as much information as possible on the selected participant prior to any home visits.
- Any participants that were deemed to be high risk for any reason were not contacted.

Case study – Supervision of a community research project in the UK

- The student telephoning the participant prior to the home visit to ascertain any additional risks so far as reasonably practicable.
- A communication schedule being agreed that ensured the student contacted their supervisor before and after every interview.
- The detailed itinerary left with the supervisor and the institution's Security Services as the research was local to the campus.

The research was successfully undertaken over a six month period. The student visited 35 women in their homes and gathered extensive data.

14. HEALTH AND MEDICAL ISSUES

When planning fieldwork, consider the need to maintain the health of fieldworkers. This may require input from the institution's occupational health practitioners or medical advisers to develop appropriate policies, procedures and advice necessary to manage health concerns.

In the absence of an in-house occupational health service or medical support, alternative procedures should be developed which allow for medical advice in relation to the health of the fieldworker to be sought from appropriately qualified health professionals such as a travel health practitioner, general practitioner or practice nurse.

A risk assessment of the health hazards associated with the particular fieldwork should be undertaken during the planning stages. These hazards may include, for example, the prevalence of certain diseases and parasites. The assessment should also detail any minimum capabilities expected of fieldworkers or participants such as physical fitness.

Fieldworkers may need a health assessment. This assessment should cover the effect of the fieldwork on health and whether the fieldworker is fit for the work they are doing. For example, are there any pre-existing medical conditions that may preclude them from or be exacerbated by the fieldwork? Do they have a long-term/debilitating condition requiring medical treatment and additional medical arrangements? Is additional medical travel insurance required for the trip?

The assessment of individual health needs and the provision of appropriate travel health advice for each fieldworker will vary in complexity depending on their health status, destination and identified hazards for the fieldwork. For example, fieldworkers who have identified on-going health concerns or disabilities may require more formal medical assessment and may need additional support (see Section 15).

CORE ACTIONS

- Develop a process to manage health concerns arising from fieldwork linking a health screening and monitoring programme for fieldworkers to assessed needs.
- Develop clear protocols for disclosing and sharing health information.

FURTHER GUIDANCE

- Considerations for management of health issues may include:
  - Long-haul flights
  - Driving
  - Mental health
  - Conditions that may be exacerbated by fieldwork or that may need immediate medical attention
  - Other assessed risks to health
- Institutions should encourage participants to disclose health issues to enable any necessary adjustments or support to be provided whilst on fieldwork.

CORE ACTIONS	FURTHER GUIDANCE
	• Consider the use of a confidential health declaration questionnaire to identify those fieldworkers requiring medical support in the field. • Arrangements should include a mechanism to share health information with fieldwork leaders. In the event that the fieldworker's consent is not given and this failure to communicate might place the fieldworker or others at risk, a clear protocol should be available.
• As part of the risk assessment, fieldworkers should research information and advice on likely health hazards associated with the work they will be doing and where they are going. Information on health hazards should include advice on preventative medical treatment for local health hazards, including any required or recommended vaccination and malaria prophylaxis. • Advise participants of the level of fitness required for the fieldwork. If, for reasons linked to a disability or other health issue, participants cannot meet the required level of fitness, organisers should consider reasonable adjustments to enable participation. Seek confirmation of participants' fitness level in writing as appropriate. • Arrange provision of or access to appropriate travel health advice and ensure that this can be accessed in a timely manner to allow for any necessary vaccinations and access to malaria prophylaxis. Include arrangements for taking medication and provision of storage for medication if necessary.	• For supervised fieldwork, and where identified on risk assessment and in compliance with the institutions travel policies, provide information to participants clearly and in writing e.g. by leaflets or information packs. Where necessary, advice should include: ○ Hazards associated with food, drink and hygiene, bearing in mind that hazards and control standards overseas might be substantially different from the UK. ○ Any significant environmental or climatic illnesses likely to be encountered (e.g. dehydration, heat related illness, acute mountain sickness). ○ Any issues regarding distances from and travel times to medical facilities, which give rise to high residual risk in the event of accident or illness. This should include an assessment of any limitations of specialist medical care. • Consider fieldwork activities which require a lower level of medical fitness and which are more likely to increase participation of those with medical conditions or mobility problems.

CORE ACTIONS

- Obtain written consent from parents or guardians for administering medication or first aid to young persons (under 18) and vulnerable adults.
- Consider the level of training of and number of first aiders required and all necessary first aid equipment as part of each risk assessment.

FURTHER GUIDANCE

- Advise fieldworkers to take adequate supplies of regularly prescribed medication in their original packaging.
- Where fieldworkers will cross borders, it may be necessary to arrange for a signed letter from an occupational physician or other medical practitioner to be issued regarding prescribed medication. Advice should be sought regarding any controlled or scheduled drugs before the fieldwork takes place.
- Fieldworkers should have a dental check-up prior to undertaking extended fieldwork, especially for visits to extreme/ remote areas where access to dental care may be difficult or where there is a high prevalence of blood-borne virus including HIV infection.

Mental Health Issues

An ever increasing number of incidents relating to psychosocial issues are becoming evident during travel abroad. UK data shows a 15 per cent increase in the number of British nationals requiring consular support for mental health issues[1]. This rise in incidence is especially relevant in academia where psychosocial issues can be exacerbated by being in an unfamiliar environment.

According to the World Health Organization, "travellers face separation from family and familiar social support systems, and must deal with the impact of foreign cultures and languages, as well as bewildering, unfamiliar threats to health and safety. Coping with high levels of stress may result in physical, social and psychological problems. Those who encounter a greater range of stress factors may be at greater risk for psychological problems.

Under the stress of travel, pre-existing mental disorders can be exacerbated. Furthermore, for those people with a predisposition towards mental disorder, such a disorder may emerge for the first time during travel." WHO 2015

This increase of stress factors may also lead to the surfacing of more complex mental health issues such as depression, self-harm, and suicidal thoughts. The presentation and subsequent management of these may be significantly influenced by the available standard of healthcare, together with cultural and language related constraints. As a result, the incidence of evacuation and repatriation for mental health issues is much higher when compared with other medical conditions. Evacuations can be complex and expensive to co-ordinate.

Standards of healthcare vary considerably around the world and should be reflected in the risk assessment as should identification

[1]UK Government, Foreign & Commonwealth Office, British Behaviour Abroad report 2014. October 2014. Available from https://www.gov.uk/government/statistics/british-behaviour-abroad-report-2014

and declaration of pre-existing medical/health conditions. Discussions with fieldworkers who have disclosed a mental health condition should take place so all relevant stakeholders are aware of the risks involved and the support needed to control and mitigate those risks.

Information should also be made available to fieldworkers about their destination, including location specific health and safety considerations along with the support measures put in place by the Institution. Mental health issues may manifest themselves during travel as a result of the changing social and physical environment, which may be exacerbated by new experiences or exposures that may be difficult to process. Fieldworkers may therefore feel the need to disclose previously suppressed feelings and emotions, and undeclared pre-existing mental health issues may be brought to light. However, consideration should be also be given to fieldworkers where mental health is often hidden due to being stigmatised.

Fieldworkers and participants can be influenced by others or have their own motivation for participating, which can influence their judgement and risk-taking behaviours. Alcohol and substance misuse, and misbehaviour by fieldworkers, will increase the level of risk to the individual as well as others. The Code of Conduct (see Section 10) can be used to engage with the fieldworker with a view to offering support.

It is important to consider the impact that exposure to extremes of human behaviour and standards of living may have on fieldworkers from western environments, and therefore a low threshold of referral to support services should be in place along with appropriate training of support staff to ensure visibility of early warning signs.

CORE ACTIONS

- Ensure protocols are in place to manage the mental health issues of fieldworkers.
- Consider the capacity of any insurance company or a specialist travel assistance provider to support a mental health crisis when selecting the company and assessing service provision.
- Ensure that a system is in place to evaluate the responses from health questionnaires in a confidential way with advice from specialists if necessary, ensuring that an individual is approved fit to travel by a qualified medical practitioner taking into account the realities of the destination and the individual's health.
- Ensure that information is provided and that good communication mechanisms exist within leadership teams and those who supervise independent fieldwork so that access to support is clear, should the need arise.

FURTHER GUIDANCE

- Ensure that pre-departure training sessions adequately cover the issues which may prove challenging emotionally and provide an opportunity for confidential further support. These should also allow some self-selection to take place prior to committing to a programme. Consideration should be given to making this available online for those who are uncomfortable disclosing such information in a group setting.
- Incorporate some questions on mental health issues within any confidential medical health questionnaire.
- Consider how access to appropriate counselling support services would be considered as part of the risk assessment. This should include access to local accredited counselling services before, during and after deployment, along with rapid access to remote support services as required.

Case study

A student travelled to Thailand as part of an outreach programme. The programme included travel to a remote location in order to participate in a community outreach project. The student was reported to be exhibiting increasing levels of anxiety as the group moved further away from urban centres, and became withdrawn with limited eye contact. Within a few days of arrival at the community project, the student was found with empty medication packets and volunteered that she had taken an overdose. The project location was several hours from the nearest medical facility which could only be reached by water taxi during daylight hours.

Following contact with the designated medical assistance provider, immediate medical advice was provided including guidance on monitoring the patient's condition, mental health first aid and ensuring a 24-hour watch until day light. The student was then taken by water taxi to the nearest town and a ground ambulance was dispatched from the nearest regional medical centre due to the limitations of care and the nature of the condition. During this period it came to light the student had experienced similar previous episodes but no health declaration had been carried out. The student was admitted to hospital for medical attention and due to on-going psychosocial concerns was repatriated with a medical escort back to her home country.

Source: International SOS Medical experts

15. DISABLED FIELDWORKERS ON FIELDWORK

Institutions should ensure that fieldworkers who are disabled are not put at a substantial disadvantage compared with non-disabled fieldworkers. In order to do this, institutions have a duty to make reasonable adjustments to enable disabled fieldworkers to participate in the fieldwork if, without such adjustments they would be excluded or experience barriers to participation. This duty is 'anticipatory' which means an assessment of the fieldwork when possible, should be done well in advance and not as a reactive process.

The only exception to this would be if the decision not to make adjustments is based on evidence that it is a proportionate means of meeting a legitimate aim. For example, the costs of the adjustments might prevent the fieldwork from taking place, thereby disadvantaging all participants or the research outcomes. Similarly, it might be justifiable to restrict the activities of a disabled fieldworker in whole or part if their safety or the safety of others would be compromised.

It should be embedded in any protocol that those fieldwork organisers seek specialist medical, health and safety and disability issues, before making a decision. The disabled fieldworker(s) should be involved in this process.

CORE ACTIONS

- Institutions should have clear policies relating to health and disability issues. They should be clear about the exceptional circumstances under which health information will be shared and/or fieldworkers' activities may be modified or limited in the interests of their own health and safety or the safety of others.

FURTHER GUIDANCE

- Establish a clear procedure that enables fieldworkers to disclose disabilities which may require adjustments or support. Such procedures should comply with the relevant provisions of the General Data Protection Regulations (GDPR) and institutional policies.
- The fieldworker's disclosure to their institution may already permit sharing information on a need to know basis but this cannot be guaranteed.
- If areas for concern are evident, speak to the fieldworker to explain why further disclosure might be necessary. Obtain consent to inform the fieldwork leader or others on a need-to-know basis, should the concerns be likely to require medical intervention. Seek professional guidance on any identified training needs.

CORE ACTIONS

- On disclosure of a disability, control measures should be implemented that support the fieldworker and the fieldwork team.
- The fieldworker and fieldwork leader should liaise with specialists to obtain guidance, advice and support to facilitate adjustments and offer participation where this is reasonably possible.
- Fieldwork leaders should be provided with the appropriate information and training to ensure that they are equipped to support any disabled fieldworker including participants who are disabled.
- Ensure specialist equipment or auxiliary aids, as appropriate, are provided for the use of disabled fieldworkers (see Section 20 on Equipment).

FURTHER GUIDANCE

Case study

Two students with autism commenced degree programmes with a significant fieldwork component. A postgraduate was appointed as their mentor to provide support during supervised residential fieldwork which was funded by the Disabled Students Allowance. The students and their mentor were briefed by colleagues from the institution's disability unit before each residential element. A positive dialogue was established between the students with autism, their mentor and the fieldwork leader well in advance of each fieldwork.
The progress of each student was closely monitored and assessed during each course to ensure that they were both physically and mentally able to cope in the field with challenging conditions. The mentor who had experience in both autism and fieldwork was used for each course over the year as continuity was considered vital for the students.

16. THIRD PARTY PROVIDERS

One of the more challenging aspects of organising fieldwork is the vetting of third party providers, particularly overseas. An institution has obligations to ensure that any third party provider has considered the health and safety implications of its activities and their potential impacts on the institution and its fieldworkers, and has or controlled identified risks.

Specific sections are given to the selection of accommodation (Section 17) and transport arrangements (Section 19). However, a wide range of other third party providers may be used and each of these should be vetted for suitability. Examples of typical third party providers are: specialist outdoor activity leaders, drilling contractors, dive services, field study centres, in-country guides, suppliers of specialist equipment and laboratory facilities. Host or partner organisations should be treated as third party providers. Using a third party provider does not absolve the institution of its obligations under UK law. Use of a third specialist provider may help to improve the overall safety management of the fieldwork. However, unless due diligence in the selection of the third party can be demonstrated, overall risks to the institution and its fieldworkers may be increased.

It may be tempting to rely solely on previous experience of or word of mouth recommendation for a third party provider as the major means of control of approval, and in many cases – particularly in developing countries – such controls may be the most meaningful and practicable measures available. However, the institution will be exposed to criticism and potential legal action in the event of an incident unless formal checks are made prior to the fieldwork and records kept – particularly if the third party provider has a safety-critical or supervisory role. It is therefore strongly recommended that institutions articulate in their Fieldwork Health and Safety Policy the level of vetting expected.

Formal vetting of contractors is now accepted practice in the UK. However, overseas many local contacts may not be used to their safety arrangements being questioned. It may be necessary to use a variety of techniques to establish confidence in a third party provider. The level of due diligence required will depend upon the individual circumstances of the fieldwork and the provider itself. For example, fieldwork carried out in Europe over a week in which travel and accommodation are provided by a well-known and reputable UK based travel agent would require far less effort to demonstrate due diligence on the part of the institution than six months of data gathering fieldwork to Africa where such arrangements are being made by local agents.

CORE ACTIONS	FURTHER GUIDANCE
• The institution should ensure that the arrangements are clear with regard to the steps required to assess the competency of third party providers both within and outside the UK. The level of assessment and record keeping should be risk based.	

CORE ACTIONS

- The fieldwork leader or independent fieldworker should take steps to evaluate the competence of third party providers in order to satisfy themselves that appropriate precautions and safeguards are in place throughout the time they are reliant on that provider. The level of due diligence required will depend upon the institutional requirements, circumstances of the fieldwork and the provider itself.
- If responsibility for the supervision of health and safety is to pass to a third party provider, this should be agreed with the third party in writing. The extent to which formal contract arrangements are needed will vary depending upon the risk involved and the level of control expected of the third party.
- Individual competencies of third party instructors (diving instructors, climbers for canopy access, providers of crew for boats and survey vessels etc.) should be specified in writing.
- Assess the institution's potential insurance liabilities arising from the failure of third party providers and transfer the risk, increase cover, or self-insure as appropriate.

- It is important that, during fieldwork, there is a clear command structure within any group. While this structure may be perfectly clear on most fieldwork, there can be confusion when command passes from the fieldwork leader to others, for example a boat skipper or a diving organiser. When this type of transfer occurs, all members of the fieldwork team should be kept fully informed.

FURTHER GUIDANCE

- Ideally, third party providers of fieldwork services outside the UK will be able to claim conformance to BS8848.
- Experience with third party providers is invaluable. It is particularly useful to monitor records of positive or negative experience with third party providers, including their reliability. This should be shared at institutional level, if appropriate.
- Agree in writing the roles and responsibilities of third party providers with regard to any contingency or emergency arrangements, action to be taken and /or provisions to be made.
- Develop a written agreement between the institution and the third party provider when the service or staff provided are key to the success of the fieldwork.
- Make public liability insurance a standard requirement on all contracts with third party providers. In some countries where it will not be possible for the third party provider to secure public liability insurance, ensure the approval is escalated in accordance with the institution's authorisation policy (see Section 4). Consider whether increased Personal Accident cover is available and communicate potential gaps in cover to fieldworkers (see Section 9).

- Where reasonably practicable the fieldwork leader should undertake pre-visit checks on the third party provider.
- Where appropriate, the emergency arrangements of third party providers should be assessed to ensure that they are suitable and sufficient (see Section 7 Risk assessment and Section 8 Emergency planning).
- For project-critical third party providers, contingency plans should be made in case the provider proves unsuitable in practice.

Case study – Independent travel company operating in Africa did not have its own public liability insurance.

As part of the risk assessment process the fieldwork organisers assessed a proposal to use a third party travel company to lead fieldwork in Africa. The institution discovered that the company did not have any Public Liability Insurance cover. Instead all participants were to be asked to sign a liability waiver.

The implication of this was that if a participant was injured as a result of negligent acts by the company or its staff, the participants would be unlikely to receive financial compensation. In this case the institution had a limited amount of Personal Accident cover under their travel insurance policy but this would not be sufficient in the event of a serious injury.

The decision whether to approve the proposed fieldwork was escalated in accordance with the institution's authorisation process. In view of the high risk nature of the work and the excessive cost of additional cover the fieldwork was not approved with this provider.

17. ACCOMMODATION

The type of accommodation that will be used for fieldwork activities will vary considerably from well-known hotel chains in busy cities to hostels, bunk houses and camping in very remote areas. Many factors will need to be considered in determining the type of accommodation required. These include the requirements of the fieldwork, the needs of all the fieldworkers and the availability of accommodation in the location of the fieldwork.

Developing countries can have differing national standards and it may be necessary to assess accommodation, prior to the work as far as possible and comprehensively on arrival. The overall aim is to reduce intrinsic risks associated with the accommodation to a level acceptable to the institution and to the fieldwork team.

CORE ACTIONS

- Ensure that the Fieldwork Health and Safety Policy effectively communicates the standards that should be achieved for accommodation used both in the UK and overseas.

- The fieldwork leader should take steps to assess the standard of accommodation as far as possible prior to the work. The level of due diligence checks required will depend upon the circumstances of the fieldwork and the accommodation provider.
- All members of staff in a supervisory role should be provided with suitable guidance to enable them to make an informed decision on whether or not the accommodation arrangements are appropriate on arrival. This will be based on the provision of basic safety precautions. Checks may include:
  - Fire safety
  - Personal security
  - General safety of the structure and facilities – for example pool, lifts, balconies, electrics and gas safety
  - Environment surrounding the accommodation

FURTHER GUIDANCE

- Institutions may have purchasing arrangements in place for the organisation of fieldwork accommodation both within and outside the UK. If so, this should include preferred providers with agreed standards of safety, or booking via a travel agent who performs basic safety management checks.

- Communicate the details of the accommodation being used in a face-to-face meeting prior to the fieldwork.
- The standard of accommodation booked should be carefully considered, particularly in unstable areas of the world or where preferred procurement practices cannot be used, or if other services offered would enhance safety – such as interpreter services, a driver, availability of a cash advance for medical care etc.

CORE ACTIONS	FURTHER GUIDANCE
• As a minimum, familiarisation with accommodation emergency escape routes will be required. • Ensure that the fieldwork leader is empowered to change any accommodation booking. This will be based on an informed decision if, upon arrival, the accommodation does not meet basic safety requirements.	
• For supervised fieldwork, inform participants in advance of the styles of accommodation being provided and give additional guidance if this is likely to be outside the participant's experience. This may include staying in tents or home-stays, or potentially if participants are expected to share with other members of the group. • Ensure that the accommodation meets the needs of all fieldworkers, paying particular attention to those with disabilities, young persons (under 18) and vulnerable adults. • Where necessary provide training to participants with regard to the safe use of any temporary accommodation such as tents.	• Take into account both the security of participants and privacy considerations. For example, security issues in some locations may dictate that female participants should not be placed alone or in rooms on the ground floor. • Provide a checklist for fieldworkers arranging their own accommodation that alerts them to potential risks and control measures. The list could include making sure that they are familiar with the fire exits, checking for internal room locks etc. A checklist is available in the Resources Toolkit.

18. CATERING

The type of catering required for fieldwork can vary between full self-catering arrangements, to being fully catered for by a third party provider.

It is common for fieldworkers to suffer from an upset stomach or diarrhoea because of something that they may have consumed. The risk of contracting something more serious such as cholera, typhoid and hepatitis A is greater in a developing country. In countries where sanitation is poor, basic precautionary guidelines should be followed, such as not drinking tap water unless it has been treated, avoiding foods such as washed salads, cooked cold meats, un-pasteurised milk and cheese and ice in drinks.

CORE ACTIONS	FURTHER GUIDANCE
• Emergency plans should consider the possibility of an outbreak of food poisoning/ foodborne infection, and have effective arrangements in place. • Ensure that the level of catering meets the needs of all members of the group paying particular attention to participants who have special dietary needs, information on which should be sought prior to the fieldwork commencing.	• For supervised fieldwork communicate the details of the catering arrangements prior to the field work. • Provide food hygiene guidance for self-catering fieldworkers, particularly if the fieldwork is remote or in areas where levels of sanitation and hygiene are poor. • Where possible provide a balanced and varied diet. • Where the risk of foodborne or waterborne illness is high it may be useful to refer to the website of the World Health Organisation (WHO) for up-to-date advice.
• A supply of potable water should be available. • For supervised fieldwork, inform participants in advance which meals will be provided for them and if they will be required to bring or purchase their own food. • Where appropriate, or where catering is project-critical, a process should be in place to check the suitability of the catering. All members of staff in a supervisory role should be provided with guidance to enable them to make an informed decision on whether or not the arrangements are suitable. This will be based on the provision of basic food safety precautions. Where appropriate, hotel accommodation checks (see Section 17) should include basic food hygiene considerations.	• Ensure that participants are able to wash their hands prior to eating or preparing food. Equipment such as antibacterial wipes may need to be provided.

CORE ACTIONS	FURTHER GUIDANCE
• Any self-catering should be arranged by a competent person, who is also able to provide effective supervision to ensure control measures such as personal hygiene facilities, temperature control and food storage are effective.	

19. TRANSPORT

Providing safe transport for fieldwork can be a challenging aspect, particularly in developing countries. Travel requirements may include transport to and from accommodation within the UK and overseas, to and from airports, and between fieldwork locations – sometimes to remote areas. If the risk or complexity of the travel dictates, it may be necessary to actively manage transport arrangements to ensure that all fieldworkers arrive safely at a particular location.

The provision of transport will also vary from public transport to third party providers (see Section 16) and the possibility of fieldworkers using their own vehicles. All of these aspects should be managed.

CORE ACTIONS	FURTHER GUIDANCE
• Ensure that the Fieldwork Health and Safety Policy of the institution effectively communicates the standards that should be achieved for transport used both in the UK and overseas.	• Institutions should have documented procurement arrangements in place for the organisation of travel. This will enable an appropriate approval process, including the consideration of health and safety factors.
• Where basic health and safety precautions cannot be assured by central procurement measures, ensure that the fieldwork leader or independent fieldworker is provided with suitable guidance to allow them to make an informed decision when selecting or using a transport provider. Guidance should be based on the provision of and confidence in basic safety precautions. • Fieldworkers must ensure that they comply with their institution's transport and driving policies and with legislative requirements, including driver training and licensing. • Ensure that adequate insurance cover which meets local legal requirements is provided for the type of transport used. • For supervised fieldwork, ensure that the mode of transport is suitable for the needs of all participants, particularly those with disabilities. Consideration should be given to engaging a logistics risk assessment specialist.	• Implement a system to ensure fieldworkers authorised to drive have valid driving licences. • It is particularly useful to keep records of positive or negative experiences of a transport provider, which can then inform future fieldwork planning and risk assessment.

CORE ACTIONS

- Ensure that all modes of transport to be used are assessed for their suitability, including the consideration of available public transport options.
- Evaluate the competence of independently chartered third party transport providers to ensure that appropriate precautions and safeguards are in place. Considerations should include the safety record of the provider, particularly in developing countries.
- Brief fieldworkers on any residual risk associated with transport safety or accessibility issues that may affect them.

FURTHER GUIDANCE

- All fieldworkers acting as drivers for minibuses or vehicles with trailers should be experienced in the use of such vehicles in addition to holding the appropriate licence.
- Where transport is critical to the project, plan for the possibility of transport arrangements failing or being assessed in situ as unsuitable.
- Risk assessments should consider the potential security threats associated with different forms and modes of transport. This applies particularly in areas with a history of kidnap or ambush.
- For supervised fieldwork, communicate the details of the travel arrangements at a face-to-face meeting prior to the fieldwork. Additional guidance should be made available for any transport that is expected to be beyond the participants' experience, for example some forms of public transport overseas.
- Ensure any fieldwork with gaps in insurance cover, or with exclusions related to transport, is approved in accordance with the institution's authorisation policy.
- Use vehicles fitted with safety belts.
- Ensure any vehicle used is fit for purpose to secure and carry the loads intended. Do not allow the vehicle to be loaded beyond the manufacturer's recommended limits.
- The risks associated with travel can be greatly reduced by making arrangements that do not involve travel after dark.

Case study – Travel risk assessment and driving policy

A risk assessment of the use of minibuses in fieldwork prior to a UK fieldwork found that:

- The vehicles were large/heavy and required long stopping distances.
- A larger number of passengers can lead to increased stress on an inexperienced driver, e.g. extra responsibility, noise and distraction – particularly if the driver has other duties in the fieldwork team.
- Minibuses tend to be used for long distances and infrequently, which is not conducive to maintaining reliability.

It was concluded that a high level of competence is required to drive a minibus. Therefore it was decided to use smaller, staff-driven people carriers on fieldwork in the UK, replacing the traditional minibus. Staff found these much easier to handle and feel more confident in their own driving abilities. Other control measures were considered that may be appropriate to other institutions or circumstances. These included i) having a number of relief drivers who were able to drive the minibus; therefore drivers felt fresh and more effective in the field ii) using coaches or public transport for long journeys.

20. EQUIPMENT

All equipment necessary for the fieldwork should already have been identified and specified at the planning stage, including any equipment or clothing expected to be provided by fieldworkers. Equipment should be specified and selected carefully to ensure that it is suitable for the intended use and conditions, and any prior and ongoing requirements for testing, examination and inspection should be detailed– including any required competencies to inspect or use the equipment. Damaged equipment and equipment that has not been approved should not be used.

Hired equipment should be similarly specified and any maintenance records verified. Where no such records exist it will be down to the judgement of the fieldwork leader and experienced team members, erring on the side of safety where there is any doubt.

CORE ACTIONS	FURTHER GUIDANCE
• Specialist equipment, including emergency equipment, safety-critical equipment and equipment that introduces additional risks, should be detailed in the risk assessment and should be suitable and sufficient for the task. • All applicable legislation must be considered. • Identify and follow requirements for the thorough examination, maintenance and inspection of equipment. Consider how this should be recorded. • Personal protective equipment (PPE) should always be regarded as a last resort to supplement other protection. Engineering controls and safe systems of work should always be adopted first. • For supervised fieldwork, give details in writing of any equipment participants will need to provide during fieldwork. This information should be given to them in good time prior to departure.	• Duplicate safety-critical and survival equipment where possible. Duplicates should be transported separately.
• Ensure that there is an inventory of all safety critical equipment. • Check all hired equipment for suitability and condition at the point of hire or collection/ delivery.	• The value of pre-use checks on equipment by the user cannot be overestimated. A good fieldwork leader establishes a culture that includes pre-use equipment safety checks as standard practice.

CORE ACTIONS

- Ensure that manual handling of loads to and from the fieldwork site has been considered in the activity risk assessment.
- Where necessary, ensure that all users have been adequately informed, instructed and trained in the use of any equipment, risks arising from its use and associated control measures.
- Ensure appropriate specialist equipment is provided for the use of fieldworkers with disabilities and that appropriate training has been provided.
- Identify the need for and provide refresher training on the use of equipment. Frequency will depend upon the type of equipment, how often it is being used and the needs of those being trained.

FURTHER GUIDANCE

- Participants will need to understand any equipment safety training, and it may therefore be appropriate to test their understanding.
- Check the existence and suitability of any personal equipment prior to departure to ensure all fieldworkers are adequately prepared.

21. MONITORING AND REVIEW

In accordance with requirements to manage and supervise health and safety, and to keep policies and risk assessments under review, each institution should develop processes to ensure ongoing monitoring of the health and safety of fieldworkers, together with a formal post-fieldwork feedback facility. It is advisable to collate details of incidents centrally to allow for institutional learning.

The Fieldwork Health & Safety Policy should be reviewed regularly and include a mechanism to benefit from the experience of those who undertake extensive fieldwork as part of their role.

CORE ACTIONS

- Institutions should establish a formal method to review fieldwork processes and procedures regularly and/or following a major incident.

- An appropriate level of monitoring of health and safety arrangements should be an ongoing process during fieldwork, and procedures should be adapted and documents, instructions etc. updated as necessary.
- Where appropriate hold a post-fieldwork debrief meeting, or other formal review, to capture any recommendations for improvement. Considerations that would indicate a need for a formal review would include inter alia:
  - Significant accidents or near-misses
  - Occasions where dynamic risk assessments were needed
  - There was a significant change to plans or itineraries
  - Where unexpected training was needed during the fieldwork
  - Whilst actions following investigation during the fieldwork normally focus on immediate cause and effect and on continuity issues, reviews should focus on potential shortcomings in planning, processes and procedures, and in management of the fieldwork.

FURTHER GUIDANCE

- Institutional arrangements for health and safety auditing should include fieldwork.
- Annual institutional reviews of fieldwork processes.

- Survey all participants following supervised fieldwork. Ideally this should be combined with other feedback mechanisms where these exist, but the survey should have a health and safety content as well as academic or business considerations. The results of the survey should be made available to all involved in the planning, organisation and participation in the fieldwork.
- Set up systems for retrospective incident reporting, and for feedback on accommodation and other third party providers.

CORE ACTIONS	FURTHER GUIDANCE
• Training needs that emerge whilst on the fieldwork should be addressed insofar as is possible as they arise. Training given in the field should be logged and considered at the formal review.	• Relevant risk assessments should be reviewed as soon as possible after return to the institution.

22. ADDITIONAL ADVICE – USEFUL WEBSITES

Fit for Travel:	www.fitfortravel.scot.nhs.uk
Foreign & Commonwealth Office Travel advice:	https://www.gov.uk/foreign-travel-advice
Healthcare Abroad:	http://www.nhs.uk/nhsengland/Healthcareabroad/pages/Healthcareabroad.aspx
WHO International Travel Health:	http://www.who.int/ith/en/index.html
CDC Travellers Health:	http://wwwnc.cdc.gov/travel/
Travel Health:	http://www.travelhealth.co.uk/
NaTHNaC:	https://www.travelhealthpro.org.uk/
British Standard for adventurous activities outside the United Kingdom (BS 8848:2014) Guide:	https://www.bsigroup.com/LocalFiles/en-GB/consumer-guides/resources/BSI-Consumer-Brochure-Adventurous-Activities-UK-EN.pdf
PAS 3001:2016 Travelling for work:	https://shop.bsigroup.com/ProductDetail?pid=000000000030331555

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