

# So you want to run a PESGB Field Trip... ?

Great news, we would love to have you involved! Field trips are an integral part of the PESGB and are a great way for members to meet and learn something new.

To get you on your way we have compiled a list of questions which will help us pull together your field trip and start tying down the details. Don't worry if you don't know the answers to all the questions at this stage, just let us know as much detail as possible.

*Once submitted this information will be forwarded to the Training Director see whether it will fit into our events calendar. Please note that completing this form does not guarantee your trip will be able to take place, although we will always do our best to accommodate all requests.*



## The Basics

Your first name

Your Last name

Contact E-mail

Contact phone number

Name of trip

Please describe in 50 words or less what this course is about and what it aims to do

For further information and guidelines please see appendix 1 – Guidelines for Trip Leaders on page 6



# The Logistics

Prospective dates or months you would like to run this:

Location

Expected leaders expenses and other costs for the budget: (please see appendix 2 on page 13 for the guidelines)

Will you be providing a field guide? and if so will you need assistance with printing?

Would you be happy for the PESGB to publish the guide following the trip?

Yes

No

Minimum number of attendees

Maximum number of attendees

Initial meeting time / place

Ending time / place?

## Accommodation

How many nights

Hotel recommendations

Will you require classroom space?

## Catering

Should any catering be included (e.g lunches or dinners in specific locations?) if so please give details:

Alternatively we can reserve tables for the group and attendees can have the option to join. But this won't be included in the ticket price. If this would work better please let me know when where you would like tables reserving:

## Transport

We recommend hiring a minibus for the ease of those attending – would this be suitable for this trip?

Yes

No

If not how would you recommend people get around?

If yes:

Do you have a category D1 driving licence?

Yes

No

Are you happy to drive a minibus?

Yes

No

Where / when would you like to collect the mini bus from? (For example from your place of work or home or the location of the trip?)

Where / when would you need to return the mini bus?



## The Marketing

Text or description for inclusion on advertising

Please also send a picture (for which you have copyright) which can be used on advertisements

Done

Who is the trip aimed at?

Is there anything else that would help us market the trip? For example tweets or articles we could publish?

If you have an itinerary for the weekend please outline it here (if you haven't, don't worry!)

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## Health and safety

Are you a qualified first aider?

Yes

No

If not do you have any recommendations for who should be the first aider on the trip? (if not don't worry I can ask one of the attendees)

Please provide a brief description of any safety or other equipment that the participants will need to bring on the trip. (This will be included on their joining instructions).

PESGB information for field trip leaders is enclosed and you should make sure that either your employers, or your own liability insurance cover (including medical insurance) is in order, particularly for personal accident and loss or damage to equipment, as the PESGB cannot accept any responsibility for claims arising from this trip. We also ask you to bear safety in mind at all times and to act responsibly when leading this trip.

Please complete and email this letter to the PESGB office, acknowledging that you have read this letter and the attached information sheet for field trip leaders, and that you accept responsibility for leading this field trip. All leaders are required to sign a disclaimer before they are able to attend a PESGB field trip. Please retain a copy for your files.

**Thank you for your time.**  
**Please send this form to [events@pesgb.org.uk](mailto:events@pesgb.org.uk)**

Once submitted this information will be forwarded to the Training Director see whether it will fit into our events calendar. Please note that completing this form does not guarantee your trip will be able to take place, although we will always do our best to accommodate all requests.

Please note that if accepted you will be required to complete a risk assessment and disclaimer for your trip.



# Appendix 1 - Guidelines for field trip leaders

## 1. INTRODUCTION

The Petroleum Exploration Society of Great Britain (the PESGB) has over 5,500 members. It was established in 1964 and became a registered charity in 1987. The Society objective is -

" to promote, for the public benefit, education in the scientific and technical aspects of petroleum exploration "

The PESGB achieves this goal in a variety of ways which include the publication of a monthly newsletter, and the organization of lectures, conferences and training courses. It also provides an annual programme of field trips for members of the Society. These trips rely upon, and are managed by, volunteers such as yourself. In recognition of this, the PESGB has prepared these guidance notes to help you -

?Successfully complete your field trip

- with minimization of safety risks
- with happy participants
- without making a loss

For some of you, especially those in academia, the organization and management of a field trip is a familiar enough process. For others, field trip organization and management is a relatively new and exciting challenge.

Whatever your experience of field trip leadership, please read through these guidance notes carefully. They will get your thoughts organized, answer some of your questions, and hopefully stimulate a few ideas. The safety of field trip participants is of paramount importance to the PESGB, pay particular attention to sections three and four which deal with field locality hazard assessment and safety precautions. There has been an increased emphasis on HSE matters in the petroleum industry in recent years with most companies that run field trips tightening up their policies. Indeed, for many members, their companies will not now pay for them to attend a PESGB field trip unless we can demonstrate HSE standards as high as the company concerned. This update follows a 2013 Council safety review of policies and attempts to minimize risk pragmatically without jeopardizing the running of field trips. The Society also draws your attention to the safety booklets listed in Appendix 1.

These notes represent nothing more than good common sense. With the exception of a limited number of basic HSE standards, they are not a set of golden rules from which you must not stray. Such an approach is impractical, as each field trip clearly varies according to the location, duration and content. Neither are the notes to be considered as final: this is a first revision and there will be further ones. In fact, I welcome suggestions for improvement.

If you have any queries, no matter how simple, please do not hesitate to contact the PESGB office in London. We are here to help you.

On behalf of the Petroleum Exploration Society of Great Britain, thank you for your interest and I wish you a successful field trip.

Petroleum Exploration Society of Great Britain.

*Version 1 : Bob Leppard*

*Version 2 : June 2013, Duncan Macgregor, 2013 Director of Education and Training*

## 2. OBTAINING PERMISSION TO VISIT FIELD TRIP LOCALITIES

Before you set a date for your field trip, make sure that you have permission from the landowner, farmer, water authority or whoever to visit your field localities. This will prevent embarrassing unannounced encounters. Remember to be aware that a seasonal ban on visiting may also operate in your proposed field area (shooting, bird nesting etc). Even if you do not require permission to visit, a courtesy letter informing the owner of your intentions is courteous and good for public relations. Take this opportunity to inform the owners that the PESGB is a responsible charity whose members have the utmost respect for the natural environment and hammers will not be used..

## 3. FIELD TRIP HAZARD ASSESSMENT

### a. Introduction

The safety guidelines recommended below are based on the C.H.U.G.D. safety booklet entitled "Safety in Geoscience Fieldwork" (Appendix 1). Before your trip, undertake your own hazard assessment exercise by writing down the potential hazards associated with each field locality (Appendix 2). Include an brief assessment of risks for each outcrop in the field trip handbook.

### b. Examples of potential hazards

#### i. Natural outcrops and cliffs faces

Assume these will be unstable. Wear a hard hat (to BS5240) preferably with chinstrap and be aware of poor ground stability above and adjacent to participants. The PESGB will instruct all participants to bring their own hardhats. Pay particular attention to joint configurations. These may define detached blocks which will fall with the slightest disturbance. This will be especially relevant early in the year, when the outcrop will have been exposed to a full winter of frost shattering.

#### ii. Upland areas, rivers and streams

Ankle covering footwear should be worn on rough ground and the PESGB will instruct participants to bring and wear this. Be wary of steep paths and slopes, a slip may lead to an uncontrolled tumble. Carry a first aid kit at all times, and it's a good idea to include an ankle support in this. Some areas may contain old mine workings which participants must not enter. Gorges may become subject to flash flooding and some bogs may become thixotropic. The weather may also deteriorate very rapidly in upland areas (refer section 3.vi). While working along riverbanks be wary of flash flooding. Note also that some rivers and streams immediately adjacent to their margins may be unexpectedly deep and fast flowing.

#### iii. Coastal localities

Wear hard hats. Wave cut platforms and coastal outcrops are slippery, especially when they are wet or covered by seaweed. Try and keep away from the surf zone and be aware of storm surges and very large waves which could sweep into your study area. Prevent the field party from walking along the base of sea cliffs (where fatal collapses have occurred in recent years), continuous pounding by waves make them very unstable, more so than inland cliffs. Use binoculars as an alternative. Do not cross any fences or barriers as these will be there for a good reason.

Research the tides for each locality well in advance of your visit. The PESGB can help you with this (section 6). Then check your estimated tide times with the local coast guard before you are due to make your visit. Leave the coastal exposure well in advance of the tide turning. This will allow you to accommodate any unforeseen circumstances (twisted ankles etc). Note that headland localities become rapidly cut off as the tide turns.

#### iv. Working quarries, mines and related man made excavations

Read the safety booklet "Code of practice for geological visits to quarries, mines and caves" (Appendix 1). Hard hats, brightly coloured reflective clothing and all other safety equipment stipulated by management should be worn at all times. For the safety of you, your field party and company personnel, obey all safety instructions to the letter. Keep to one side of roadways and try to anticipate blind spots such as junctions and the brow of inclines. Designate one or two persons as 'look-outs' where necessary. Do not walk along side vehicles as quarried blocks often fall off them. Do not touch machinery.

Be wary of man-made ponds and slurry pits, they are often very deep and have steep loose embankments. Do not pick up pieces of electrical wiring or aluminum, they may comprise explosives which have misfired. For the same reason, do not poke around drilled shot holes. Ground conditions are often unstable, especially after blasting. For this reason, stay away from the edge of quarry faces and be aware of joint configuration for the reasons given in section 3.b.i.

Working facilities will have first aid on site. Know where it is and how it can be contacted quickly.

#### v. Roads and road cuttings

If your vehicle breaks down, get every participant out of the vehicle and arrange for them to sit / stand a safe distance away from the roadside. When photographing or inspecting an outcrop, be aware that delegates may step back into the oncoming traffic. High vis jackets must be worn when working on roadsides and the PESGB will instruct all participants to bring these.

Be extremely vigilant when the party is alighting from a vehicle. Participants will be eager to stretch their legs, get some fresh air, or visit the outcrop etc. They will not be focused on the dangers of on coming traffic. Make sure that you get out of the vehicle first, ensure that delegates alight from the correct (pedestrian) side of the vehicle in an orderly manner. Even if the road is no more than a quiet country lane, observe these precautions.

#### vi. The weather

Beware of sunburn or heat stroke. The weather can also deteriorate very rapidly, especially in upland or coastal areas. Advise field trip participants to come equipped with either walking or Wellington boots. They will also need to wear a system of layered clothing (non-cotton) which can be removed or put on as temperatures fluctuate. One of these layers should be waterproof and wind proof.

For weather forecasts try : [weather.noaa.gov/weather/GB\\_cc.html](http://weather.noaa.gov/weather/GB_cc.html)

[www.met-office.gov.uk](http://www.met-office.gov.uk)

[weather.org.uk](http://weather.org.uk)

[www.bbc.co.uk/weather/](http://www.bbc.co.uk/weather/)

Note that the national TV forecast should be considered only as a very general guide.

#### vii. Flora and fauna

Not really a problem in the UK but in certain times of the year, midges can play havoc with a field party in summer months. There may be a very small risk of snake (adder) bite in some UK localities. Vegetation may conceal old mine shafts.

#### viii. Geological hammers

Geological hammering is unnecessary. Apart from being unsightly, it makes a mess of the local environment and will eventually spoil the outcrop for other geologists. It is illegal in SSSIs and national parks. It also irritates farmers and landowners who may consider hammering to be nothing more than vandalism. Therefore, the general PESGB policy is that hammers will not be brought or used.

However, if you feel that the use of a geological hammer is justified (perhaps in a working quarry) be considerate. Ensure that you first obtain permission. Advise participants to put on protective goggles before using a hammer, and to check the ground stability above and adjacent to them. Geologists also need to be protected from flying rock chips.

Never hit a geological hammer with another hammer (chisel action) it will shatter. It is far more effective to collect a fallen block of rock and prepare this for display or inspection at your place of work!

#### **4. SAFETY IN THE FIELD**

##### **a. Before your trip : First Aid Qualifications**

ALL LEADERS MUST BE QUALIFIED FIRST AIDERS unless the field trip is entirely within an industrial site, cave or tourist site where there is first aid on site or you are able to guarantee the attendance of a co-leader who is a first aider. At this stage, Boulby Mine, Alderley Edge and Building Stones are exempt. Your first aid certificate should be up to date (within 2 years) and cover resuscitation techniques. If you are not a qualified first aider, the PESGB will arrange and pay for you to attend a course either of your choice or preferably by our preferred and tried and tested provider 'Training Expertise', who have courses across the country. Please allow time for this as the courses are only every few months.

When taking registrations, the PESGB will determine who else attending the field trip and is willing to be a backup first aider. We will limit the number of registrations on the trip to 15 if a backup first aider is not identified. Ensure that they become known to you. The PESGB will enquire as to medical conditions and this information will be made available confidentially to you.. A nominated person should be in charge of overall safety during the field trip and this should be made clear on the first day, by all means delegate this if another first aider on the trip is more experienced than yourself.

Identification of a backup or second first aider is considered critical to any trips with particularly high risks such as long cliff sections, overseas trips or groups exceeding 15. The Director of Education and Training is also required to be a qualified first aider and may be called on in such circumstances.

Add in the field guide a page with lists of emergency numbers and directions to local hospitals.

##### **b. Travelling on the Trip**

PESGB field trips usually involve the use of several private cars. The chance of a car accident clearly is proportional to the number of cars, so try to reduce these : this also helps with the feasibility of parking at roadside localities. Where finances allow, consider a minibus. Ask for volunteers to be drivers for others to reduce the number of cars used. On a Sunday, when many will wish to drive straight home from the field and thus take their own cars, it's a good idea to find a public car park to assemble all cars in, redistribute the participants to a smaller number of cars and return everyone later to that car park. It will also reduce car parking charges!

PESGB discourages driving under the influence of alcohol and clearly the less alcohol drunk during the day, the lower the risk. This is stated in the guidelines sent to all participants. If you suspect anyone is over the limit and breaking the law, they must be prevented from driving or asked to leave the field trip. Be aware to the sensitivities of passengers in such cases. If you are worried about controlling alcohol consumption during the day, then take packed lunches : for large groups, this saves a lot of time in any case..

##### **c. Items to be carried by the field trip leader**

###### **i. Documentation**

In case of any problems occurring during the trip itself, the PESGB will provide a contact representative for you over the duration of the trip. The PESGB will supply you with a list of participant names and address. All participants will be asked to provide details of persons who must be contacted in the event of an accident. These data should be carried with you. Note that supplying personal contact details is entirely a matter of individual choice, but the PESGB offers this option to participants. Additional documentation to be carried includes topographic map(s) of the field localities,

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a map to the local hospital, completed hazard assessment sheets, and a copy of the international mountain distress signal (Appendix 3).

###### **ii. Equipment**

Carry a mobile phone and make sure that the batteries are fully charged throughout the duration of your trip. Have a contingency plan if there is no mobile phone reception – where is nearest reception or land line? Do not forget to give your mobile phone number to your deputy leader(s) (if any) and your personal / PESGB office contact. Carry a first aid kit at all times, especially when away from the vehicles, which contains bandages, aspirin tablets, plasters, tweezers (for stings), ankle supports and surgical gloves (Appendix 3). Note that these items can be borrowed from the PESGB office. Also be aware of nearby medical facilities and how to contact the local mountain rescue team/coast guard. Other equipment required by the leader include a whistle, bright orange plastic survival bag (or reflective space blanket). These are cheap to buy, take up very little room and will not malfunction.

###### **iii. Teaching aids**

Large, simplified colourful diagrams and A4/A3 sized rock thin-section photographs are a very effective way of getting across ideas when in the field. Laminate these or cover in a clear plastic bag to protect them from the weather.

##### **d. When you arrive at the field trip locality**

Distribute the potential hazards of each field locality to participants, preferably in your field guide. Make sure that participants are aware of the potential hazards by reading them out at each locality.

##### **e. If an accident occurs**

Stay calm, re-assure the casualty and administer first aid. If you suspect a back injury, do not move the casualty. If required, call an ambulance or an appropriate emergency service. Do not leave the casualty alone. If the accident takes place away from the road, instruct one or two individuals to meet the rescue services and guide them back to you. If you do not have mobile phone reception, send another fit participant to find reception or a landline, whichever is easiest, having previously determined where this will be.

Inform the PESGB as soon as you can. Instruct the field party not to talk to any outside agencies (the media) however friendly or engaging. Try and write down the details of the accident as soon as possible, get witnesses to do the same. Prepare an incident report afterwards.

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### 5. FIELD TRIP INSURANCE

The PESGB maintains liability insurance to cover you and the group in normal circumstances. This does not cover boat trips, for which you will have to ensure the boat owner covers adequate insurance. For any oddities such as this, please contact the PESGB to ensure you are covered. All attendees, including the leader, are therefore asked to sign indemnity forms prior to departure. This will be arranged by the PESGB office. If for whatever reason, these forms have not been signed by commencement of the field trip, leaders are asked to ensure participants sign a disclaimer before allowing them to take part in any trip. No signature, no field trip. End of story.

### 6. THE HELP CAN YOU EXPECT FROM THE PESGB

The PESGB appreciates and recognises that you have given up your spare time to provide a field trip. The Society is therefore keen to assist you wherever it can with -

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- Photo copying, binding and distributing your field guide to delegates (Section 10).
- Provide PESGB headed A4 paper for letter writing, or write letters in house for you.
- Provide PESGB notelet slips.
- Contact/liase with individuals/landowners on your behalf when necessary.
- Collect and provide relevant information about field trip participants on your behalf.
- Provide a figure for the minimum number of people which must attend your trip.
- Work out tide times for each of your localities (where necessary).

Remember also that the PESGB will be happy to provide general guidance and advice whenever needed. Simply pick up the phone or send an email.

### 7. PESGB PRICING THE FIELD TRIP

#### a. Introduction

The PESGB is a charity and runs field trips on a non-profit, cost only basis. Attendees pay for their own transport, accommodation (this is part of the registration cost) and subsistence. To work out what the cost of the field trip will be for each participant, it is important that you thoroughly research the cost of -

- Your own expenses (food and drink)
- The cost of accommodation (PESGB pay for this directly) – maybe remove this line
- Vehicle hire (if applicable). Leader normally bring their own vehicle unless they specify they want a car hire
- Cost of fuel – if using their own transportation 40p per mile
- Other possible expenses.

If you do this accurately, it will prevent the PESGB from making a loss.

#### b. Maximum number of participants per trip

Attendees are limited to PESGB members, with a maximum number of twenty attendees per trip and fifteen if only one first aider is identified. Any change in this policy must be discussed in advance with the Director of Education. If you desire a lower limit because of parking restrictions etc, please inform the PESGB before registrations open. If a company wishes to make a block booking onto your field trip, you must discuss this with the PESGB office before any agreement is made.

#### c. Working out the cost of your trip for each participant

##### i. Your personal expenses

You need to work out your own expenses which may include -

- Duplication of field trip guides (if applicable).
- Binding of field trip guides (if applicable).
- Return travel between the field trip location and your home.
- Your food and drinks during the field trip.
- Minor incidentals (postage, phone calls etc).

There is no reason why this figure should not be accurate. Please adopt a conservative approach to personal expenses. Keep costs down by using standard class public transport (if necessary) and a modest approach to accommodation and subsistence. The PESGB will not reimburse you for the following -

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- \* The time you spend organising the field trip.
- \* The time you spend preparing field guides.
- \* Pre reconnaissance of the field trip area.
- \* Cost of any third party help or help from relatives.

##### ii. The cost of accommodation, vehicle hire and fuel

It is important to try and estimate the number of people who will come on your trip, this will help you judge the cost of accommodation and vehicle hire. Decide on the minimum number of people you are willing to run the field trip for. This will give you the minimum cost of accommodation and vehicle hire. Conversely, the maximum number of people you and your appointed deputy (if any) can cope with will provide the maximum cost of accommodation and vehicle hire. The actual number of participants will occur somewhere between these two extremes. Note that the PESGB may help you decide the minimum number of delegates required in order for your trip to go ahead (refer section 9).

Assume that participants will be willing to pay £50 to £80 per night for accommodation. A spare room for an introductory talk or evening lecture may also be an additional charge. Check this.

Minibuses are good options for large groups and reduce logistical problems and many of the risks. Shop around for a reputable vehicle hire company and ask them to

guarantee the hire price. I doubt you will need to hire more than two mini-busses. If you are not able to drive the **mini bus yourself, or find a** participant who is willing to do this, a driver will be needed. This of course will be an additional cost. If you are an academic, your own institution may be willing to let you use departmental (minibus) transport. Please will you consider looking into this, it will help keep costs down.

##### iii. Give yourself a financial margin

Give yourself some financial maneuvering space by working in extra funds to cover unforeseen costs. One area where costs are likely to be more than you expected is petrol. Therefore, reasonably overestimate the cost of your fuel. Remember also that cost of petrol is likely to increase just after the Chancellors budget statement.

Note also that since you will be planning your trip months in advance, we may ask the hotel or Bed and Breakfast to guarantee their prices. If they cannot do this, we will ask them when they are due for revision and by how much. If they are unwilling to give you this information, assume an increase of 10% by the onset of your trip.

##### iv. Work out the cost per individual participant

The PESGB will prepare a budget for the field trip with your help and calculate the cost per participant

##### v. Additional costs that individual participants will have to pay

Delegates will have to pay for their own travel, subsistence and accommodation costs (this is part of the registration fee) while travelling to and from the prearranged field trip meeting point(s).

## 8. BOOKING ACCOMMODATION

### a. Introduction

The Field Trip Leader is more likely to have expertise knowledge of the field trip area therefore PESGB staff will seek hotel recommendations from the Field Trip leader. Also the Field Trip Leader may have used the hotel on previous field trips and are happy to return.

PESGB will book and liaise directly with the hotel and pay the deposit/money directly to the hotel.

The PESGB Co-ordinator responsibility will be to sort all hotel arrangement – from enquiring availability, date, reservation to payment.

### b. Reserving rooms

It is likely that the establishment of your choice will dictate terms and conditions for booking accommodation. The PESGB Co-ordinator will liaise will let you know if there are going to be any problems. If there are no stipulated terms and conditions, we will use the following guidelines for booking PESGB field trip accommodation -

1. Fix a date for your field trip – with your agreement and approval
2. Find a hotel or bed and breakfast establishment in or as near as possible to the field trip area as recommended by you. Participants will require a mixture of single rooms, double rooms, rooms with ensuite bathroom, and rooms with shared bathroom facilities. We never usually consider using student halls of residence. Also consider using youth hostels in remote areas, though check for seasonal opening. Do not forget to call the local tourist office, they will be able to help you. – can we delete sentence regarding youth hostel..
3. Check for room availability at the time of your trip. Field trip participants do not like sharing rooms, so concentrate on single room availability. However, it will do no harm having one or two double rooms booked for those who do wish to share.
4. PESGB will book the rooms, but will first try and negotiate a discount for the block booking. Do not be afraid to ask, this is standard practice in the business world, and they will probably be expecting this request anyway! Try for a 5-10% discount at least, especially if the booking is out of season. The fact that you are running the trip for a non-profit making registered charity should also help swing a cost reduction.
5. The hotel or B & B will require a deposit for the rooms, especially if your trip is set to take place in the holiday season or in a busy tourist area. This is entirely fair and standard practice. Find out when the deposit needs to be paid by.
6. Try and keep the cost of the deposit down. If possible, ensure that the deposit or part of the deposit is refundable up to four weeks before the start of your trip. A signed written agreement of this will provide the PESGB with protection against loss or part loss of deposit if problems occur before the refund deadline.
7. Send the accommodation details (name, address, phone number, payment details etc) to the PESGB office so that they can pay the deposit. Note the PESGB Executive Director can only raise cheques up to £500, anything higher needs to be authorised by the treasurer and takes a little longer to organise.
8. Bookings from PESGB members are taken by the PESGB office. The PESGB will only pay the final balance for accommodation (excluding a holding deposit) if the accommodation is included in the field trip price. Find out when this must be paid by.

### c. General considerations when booking accommodation

If you have run your field trip before and are satisfied with the previous accommodation, then use that establishment again. If the hotel or B&B can get repeat business from you because of previous good service, it will make for an all round win-win situation.

When booking accommodation we will try our best to ensure that everyone is under one roof. This simply makes for a good team atmosphere and as field trip leader, it will also help you deal with any unforeseen circumstances much more effectively. However, be aware that some delegates may, for whatever reason, wish to make their own accommodation arrangements (stay with friends or family, short holiday etc).

Remember to inform field trip delegates that they may be an extra charge for an evening meal/ packed lunch/alcohol with dinner. You will also need to find out if any of your delegates have any special dietary requirements which might include -

- ? Muslim faith ? Jewish faith
- ? Vegetarian (non vegan) ? Allergy (nut products etc)
- ? Vegetarian (vegan) ? Medical (diabetes etc)

Ask the hotel if they can recommend a nearby establishment which can provide accommodation if the number of bookings exceed your expectations.

Keep in mind that some field trip delegates might wish to combine your field trip with a family holiday. In which case you will find out if the hotel has baby-changing facilities or a children's menu etc. It is an unlikely scenario, but be prepared, especially if your trip is located in or near a tourist area.

## 9. ADVERTISING YOUR TRIP

If you have agreed to provisionally run a field trip, the PESGB needs confirmation from you by early November and will begin advertising your trip in the January training guide. Field trip leaders are asked to submit a detailed synopsis of the geological (and social) highlights of the trip with diagrams and photographs. This should be sent to the PESGB office as soon as possible for publication in the first quarter of the year.

If there has been insufficient bookings by a set date arranged by yourself and the PESGB, your trip will be cancelled. To prevent this happening, consider the following preventative action.

? Inform your colleagues, students or research students about your trip. They may wish to come along (and help out!). Remember, the PESGB requires a separate booking form and associated disclaimer from each individual. Booking forms can also be used to make provisional reservations.

? PESGB field trips are both scientific and social events. If you have colleagues whom you have not seen for a while, inform them of your trip. The field trip locality may be a mutually convenient place to meet.

## 10. FIELD TRIP GUIDES

As a field trip leader, please consider preparing a field trip guide. This should include all safety information and hazard assessments. The PESGB asks that you submit your field guide in good time, so that the society is able to send the document out to delegates around fourteen days before your trip is due to commence. If you would like to see some previous examples, ask for a copy from the PESGB office.

With your permission, the PESGB will offer extra copies of your field guide for sale to PESGB members for the cost of duplication. All field trip guides require a PESGB logo on the front. Note that the PESGB has only black and white printing facilities.

You may also wish to consider preparing a brief information sheet which can be sent out with your field guide. This might include -

- ? Accommodation details (address, telephone number etc).
- ? Your special requests or instructions.
- ? Meeting times and location of pick up points.
- ? Field trip itinerary.
- ? Background reading.

The local tourist office will also provide you with local car park information and town centre maps free of charge. The PESGB will send these out to delegates on your behalf.

## Guidelines for field trip leaders

### 11. LEADERSHIP DURING THE FIELD TRIP

Good organization, good communication and awareness of the individual will make for a successful and happy field trip. To help you achieve this outcome, consider the following general points -

Communicate : ? Keep all participants informed of the itinerary and any changes in circumstances.

Be considerate : ? Learn and then use the first name of each participant.

? Be aware of group dynamics. For example do not allow one or two individuals to hijack scientific discussions to the boredom of everybody else.

? Watch out for individuals who appear subdued, they may be feeling unwell.

Build a team : ? Remember to arrange for an early group photograph session, this makes for a good team atmosphere. Allow for plenty of time for socializing.

? Please make sure that everyone is staying under same roof (section 8.c).

Language : ? Make an effort with participants whose first language is not English. If you do not, they will withdraw into their own cultural huddle. Note also that some guests will be unfamiliar with Welsh/English/Scottish/Irish culture.

Vitality : ? Enthusiasm is infectious, demonstrate an interest in the comments and observations which participants make on your trip.

Plan ahead : ? Consider and then plan for all reasonable eventualities and make sure you can act accordingly.

? It is probably a good idea to think about a possible foul weather alternative itinerary before your trip. This might comprise some sort of cultural activity.

Judgement : ? If the weather is bad, and people are getting fed up, relocate to the nearest café or return to the hotel.

Deputize : ? You may find that an unofficial / official deputy leader will help you manage the group. This could be colleague, or a participant who seems to have slipped into this role. Ask someone to write up the trip for the newsletter.

PESGB field trips are relaxed informal affairs so do not be too rigid with your time. Participants enjoy shopping for snacks, souvenirs, post cards etc so allow for some retail therapy. Do not forget that folk may also need to visit a cash point or W.C. Finish the field trip in good time. Agree to reasonable requests for drop offs at railway stations etc, but be aware that other people want to get home.

### 12. OVERSEAS FIELD TRIPS

Travel agents may substantially reduce your workload by researching the cost of booking and arranging accommodation, travel, vehicle hire and can often negotiate discounts for group travel. A disadvantage of this approach is that they will not necessarily be looking out for the best deal! Whatever organization you use, try and get them to guarantee prices.

Research the country and field area. The Foreign Office web site may be useful in this respect. Refer also to travel guides for general information about the field area. The ' Lonely Planet ' books are particularly good in this respect. Make full use of your local contacts (if any) for advice and travel arrangements.

Be aware that exchange rates can fluctuate widely. This can reduce the value of your currency en route, so over estimate the amount of cash that you and the participants will need. Remember also to have cash to pay for airport departure tax (if applicable). Your credit card will not always get you out of trouble, some countries and rural areas may operate a ' cash only ' economy so make sure you have a good supply of bank notes with you.

Make sure that participants are informed in good time of any visa or vaccination requirements. They will also need to have the correct (medical evacuation type) insurance. If the field trip is in an E. U. country, participants will need to fill out an E1-11 form to ensure free medical care.

Be aware of local customs and traditions. Always ask permission to take photographs of individuals and their surroundings. Find out who the head of the village is and pay your respects accordingly.

If you or any field trip participants have a medical condition, it would be prudent to carry a doctors note translated into the local language/dialect. Consider using local expertise and guidance. TWO FIRST AIDERS ARE COMPULSPRY ON OVERSEAS TRIPS.

Climatic extremes may be more significant while on overseas field trips. There may also be a danger of flash flooding so be wary of walking along dry river beds or gorges, they can become torrential due to storm activity many miles away. Snake, spider and insect bite may also be a potential hazard.

### 13. AFTER YOUR FIELD TRIP

#### a. Leader expenses

When claiming your expenses, please complete an official PESGB expense form. Return this to the PESGB office, with receipts, as soon as possible. You will be reimbursed with a PESGB cheque in three to four weeks after your claim for expenses has been received.

#### b. Acknowledgements

If you were pleased with the accommodation and transport, send a thank you note to the relevant individual(s). Remember also to send a thank you note to the owner(s) whose land you visited during the field trip.

#### c. Newsletter article

Following the trip, it is customary to write a review with photographs of attendees. It is the responsibility of the field trip leader to make arrangements for this and to send the article to the PESGB office.

#### d. Have you considered running the trip again?

If your trip was a success, and you enjoyed it, why not consider running the field trip again. If you are interested in this possibility, let the Field Trip Director know as soon as possible.

#### e. Field trip guide

Make your field trip guide available to the PESGB to sell for the cost of duplication.

### 14. ACKNOWLEDGEMENTS

This document follows on from guidelines prepared by the previous PESGB Field Trip Director, Bob Leppard. I also wish to thank PESGB member Peter Gutteridge who provided stimulating advice and guidance while these notes were in preparation.

### APPENDIX 1. Supplementary reading

British Mountaineering Council Pamphlet: Safety in Mountains.

Code of practice for geological visits to quarries, mines and caves. Published by the Institution of Geologists / Geological Society. pp8\*.

Guidance Note: Safety in Fieldwork. NERC January 1992. Based on consultation with British Geological Survey Staff.

Guidelines and Code of practice For Fieldwork, Outdoors and Other Off campus Activities as part of an Academic Course. Published by Association of University and College Lecturers. 1st Edition

1994. ISBN 0905443047.

Safety in Geoscience Fieldwork: Precautions, Procedures and Documentation. Committee of Heads of University Geoscience Departments. Published by the Geological Society. Pp18\*.

St. Johns Ambulance: First Aid Manual.

\*Booklets are available from the Geological Society, Burlington House, Piccadilly, London (Appendix 4).

### APPENDIX 2. Example of hazard assessment

The Wainstones Crag - North Yorkshire Moors National Park

The car park is a known crime black spot, therefore advise participants not to leave personal possessions in the vehicle(s). Access to the locality is by moorland paths. These are well defined but are flanked on one side by steep crags up to sixty feet high. Participants must not stray from the path, especially if visibility is poor.

The party will be examining a crag up to thirty feet high. Loose rock occurs at the top of the crag so each participant must wear a safety helmet. Participants must also be careful not to dislodge detached blocks onto the people below them. There is an abundance of loose broken blocks along the foot of the crag so geological hammering is unnecessary.

### APPENDIX 3. Recommended contents of first aid kit

The first aid kit outlined below is recommended by paramedics, supplemented with several items which will enable you to administer minor ailments and discomforts. There are also several items of survival equipment listed. The kit should be carried in an accessible and easily identifiable container.

- Assorted elastoplasts • Surgical scissors
- Strip of elastoplast fabric dressing • Surgical gloves
- Assorted sterile dressings • Antiseptic cream
- Sterile cotton wool • Antiseptic wipes
- Standard eye pad and bandage • Aspirin
- Three triangular bandages • Paracetamol
- Assorted crepe bandages • Torch
- Surgical tape • Survival bag
- Safety pins • Pepto-Bismol/diarrhoea treatment
- Tweezers (for stings) • Assorted coins for telephone/telephone card

The international mountain distress signal (SOS) is; three short, followed by three long, followed by three short whistle blasts / shouts / torch flashes. If your field trip is abroad, consider a sterile pack of hypodermic syringes, sutures, blood transfusion equipment and a sterile dental kit. Iodine for water purification and oral re-hydration treatments will also be a useful additions. This kit can be bought from British Airways travels clinics and is excellent value (Appendix 4).

### APPENDIX 4. Useful addresses

Safety equipment Geo Supplies Ltd The Geological Society Burlington House

16 Station Road Piccadilly

Chapelton London

Sheffield W1V OJU

S35 2XH

Phone 00114 245 5746 Phone 020 7734 5673

Field work insurance Bryan and Knott

11 High Street

Bridgenorth

Shropshire

WV16 4DB

Phone (01746) 765214

There are 28 British Airways travel clinics located in England, Wales and Scotland. These will provide a full range of immunisations, sterile medical packs, malaria pills and the latest Foreign Office travel advice. Look in the Yellow Pages or local business directory for your nearest clinic.

### APPENDIX 5. A few ideas about how we learn

PESGB field trips are enjoyable, relaxed and informal affairs but they also provide participants with a very good educational opportunity.

To help participants get the most out of your field trip you might like to try and 'factor in' the following intellectual and practical activities during your trip course –

- A concrete experience
- An opportunity for reflection
- Generalisation (and/or abstract conceptualisation)
- Application of participants new knowledge to a new or old situation

How you go about achieving this is entirely up to you, but it is worth bearing in mind that the above is a legitimate theory of learning, proposed by the educationalist David Kolb who called it 'the cycle of learning. This is shown below.

Concrete

Experiences

Applying new

knowledge to new Observation

or old situations and reflection

Formation of

abstract concepts

and generalization

In order for individuals to learn effectively, they must according to Kolb's theory, go through each stage of the cycle.



## Appendix 2 - PESGB EXPENSE POLICY

- In the first instance, all persons on PESGB business shall seek travel support from their own organisations.
  - In the event that organisation support is not available, a request for PESGB support can be made see below.  
NB: A trustee of the Council should not be out of pocket, if their Company won't pay this should not be a deterrent to attending.
  - At the start of each quarter or month, expenses should be estimated and submitted via email, to the Executive Director and Treasurer in the first instance.
  - The PESGB only covers expenses for public transport travel. Expenses possible to claim normally exclude meals, but in certain circumstances, this may be necessary and where possible, anticipated and estimated when initially submitting a request.
  - Following approval, the expenses will be incorporated into PESGB financial forecasts and budgets.
  - Any expenses likely to go over those previously advised, should be discussed with the Executive Director and Treasurer so the budget can be adjusted accordingly. NB: It may not always be possible for payment of additional expenses.
  - PESGB Council members as charity trustees are entitled to receive reasonable out of pocket expenses to enable them to
    - attend PESGB Council meetings or officiate at PESGB events, which are necessary for the charitable running of the PESGB.
    - Reasonable entertainment of external voluntary/unpaid who have made key contributions to meetings, events and publications
    - End-of service hand-over lunch for Council members
- Any other expenses to volunteers are paid through the good will of the PESGB, a registered UK charity with limited financial resources.  
Reference: PESGB Memorandum of Association Point 5. Benefits to Members and Trustees.
- On receipt of approval, all travel arrangements and expenses are made and paid for by the traveller.
  - All expenses should be held to a minimum. Every effort should be made to ensure that expenses are the lowest cost available eg. second class travel. All items must be covered by a receipt.
  - Reimbursement of expenses will be made by the PESGB upon submission of itemised request with receipts and completed expense claim form.
  - All expense claims must be made on a regular basis, within financial review timetables (eg. within a month for PETEX, quarterly for PESGB) to assist accurate forecasting of expenses against budget.
  - All expenses can only be reimbursed if they are claimed by 20th December, before the end of the calendar year, so they can be incorporated in that years expenses for budget purposes. No expenses can be claimed following expiry of any period of office.
  - Any expenses incurred during review or handover period should be claimed immediately (eg. given into the office at the handover meeting).
  - No expenses will be reimbursed by the PESGB without prior written approval.
  - PESGB & PETEX expense claims can take up to 1 month to process and distribute.
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