PRE-APPLICATION GUIDANCE FOR FOREST AND PEATLAND SITE ACCESS AND USE

THIS DOCUMENT SHOULD BE READ CAREFULLY BEFORE APPLYING FOR SITE ACCESS

Welcome to the University of Edinburgh's Forest and Peatland Programme

This programme is dedicated to achieving multiple benefits for carbon reduction, nature, and people.

The Forest and Peatland Programme sites serve as dynamic operational environments, where a variety of activities including woodland creation, peatland restoration, habitat management, and public engagement and access provision are actively undertaken. While these sites are prioritised for operational functions, they also present invaluable opportunities for education and research initiatives.

To ensure the integration of planned educational and research activities within the Programme sites, an approval process has been developed, complementing internal protocols necessary for fieldwork or field trips.

A permission process has been established to:

- ➢ Safeguard ongoing operations;
- ➢ Mitigate any potential risks or harm to both individuals and the environment;
- ➢ Maintain public access;
- ➢ coordinate with other planned teaching and research activities;
- ➢ Ensure ethical measures are followed;
- ➢ In partnership sites, ensure activities are approved by the landowners;
- ➢ To provide guidance and support

All access requests should be made by completing either site access form A or B, depending on the nature of the activities

i. **Site access Form A** if activities are Scottish Outdoor Access Code (SOAC) compliant, such as site walkovers, keeping to the assigned paths, or do not include research/fieldwork. Additional supporting documentation is needed:
   - Signed-off risk assessment.

ii. **Site access Form B** if planned activities will go beyond (SOAC), involving research/field work (even for training purposes) such as walking off assigned paths, sampling or collecting specimens, possible disturbances to wildlife or habitats, and operating equipment such as drones. Additional supporting documentation is needed:
   - Signed-off risk assessment
   - Signed off Ethics assessment
   - In some cases, a map of planned activities

Ideally, site access requests should be submitted at least six months in advance for complex projects or activities. At a minimum, straightforward requests must be submitted no later than six weeks before the intended visit/activities. Please note that access is not always guaranteed, as decisions are based on a careful balance of multiple criteria.

Before completing the site access application form, it is essential that you thoroughly review the responsibilities of the team and of visitors/researchers, as well as the code of conduct (as outlined below).

FORESTS AND PEATLAND PROGRAMME TEAM RESPONSIBILITIES

1. Access to the site is contingent upon approval, and activities must not commence until permission has been granted, by the forest and peatland team and as needed by the visitors/researchers school/institute.

2. Access approval is determined via a thorough assessment of multiple criteria. This evaluation aims to mitigate risks, prioritise the well-being of visitors and local residents, and safeguard the environment. Ecological conditions, social considerations, stakeholder/partners preferences, and other scheduled LTR activities are also accounted for.

3. The Programme is committed to fostering positive relationships with local partners and stakeholders, prioritizing mutual respect and collaboration in line with the University of Edinburgh's core values. Consequently, proposed activities should ideally align with or contribute to these broader objectives.

4. The approval process for site access requests—whether for learning, teaching, or research—follows the same general steps. However, the specific approval requirements will vary depending on the nature of the proposed activities, including their potential impact, scale, duration, and whether the site is University-owned or a partnership site.

5. The Programmes approval process will go through the following steps, according to the scope, scale, and duration of the proposed activities, and if the site location is university-owned or a partnership site, see Figure 1.
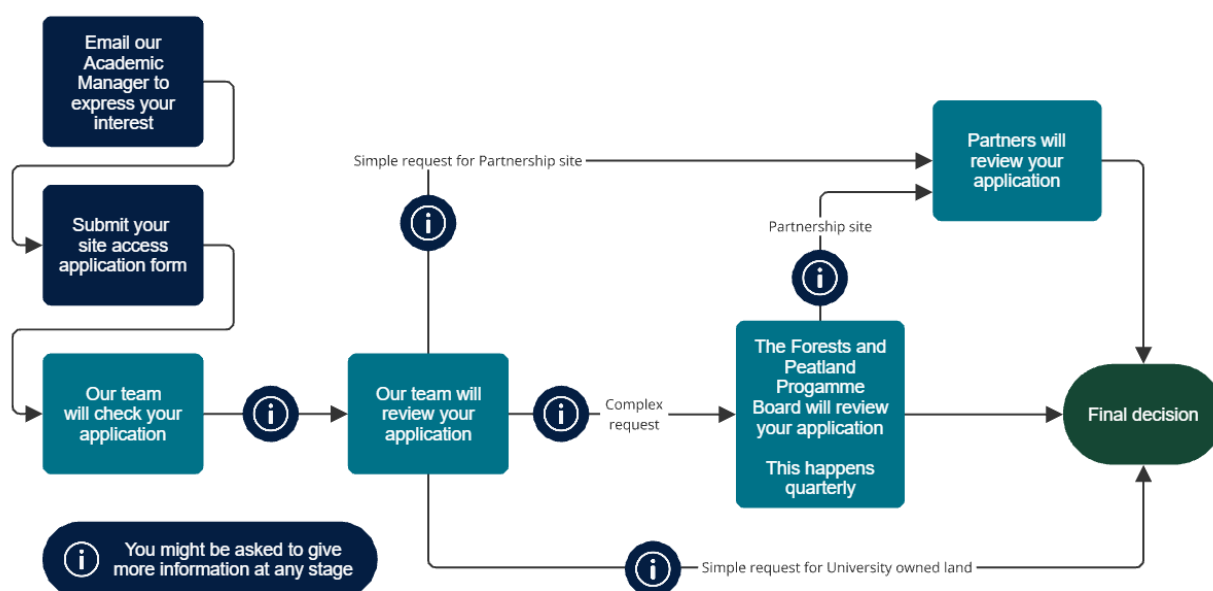

Figure 1. Forest and Peatland Programme site access approval process

6. Even with permission, access may change if activities or dates are altered, or extenuating circumstances (e.g., health and safety risks from extreme weather) arise. Applications may require re-review. To avoid issues, visitors/researchers are advised to stick to the approved access dates.

7. The team will provide site information, upon request, via the relevant '*site information sheet'*, covering practical considerations e.g., facilities available, site risks such as utilities, access requirements, parking locations, etc.

8. If visitors/researchers require a site scoping visit, a Forest Ranger may be able to provide a guided visit, depending on their availability. The Ranger is not responsible for visitors/researcher group's health and safety or activity management; or travel arrangements, this is the group leader's responsibility. To request assistance, please note this in the form with advance notice. Availability is not guaranteed, but the team can suggest a potentially suitable date.

9. If team resources are required to assist with visitors/researchers visits, then resources may, in some cases, need to be compensated according to what is required.

10. The team can provide information on the scheduling of operation activities. See Programme web pages for general updates. Scheduling is subject to change.
11. Based on the nature of the proposed fieldwork/field trip, the team will provide, a site constraints map. This map will indicate where activities will be restricted due to ecological, heritage, historical, and utility constraints. This map will be provided on request, depending on the activities proposed.
12. The team will provide information to support Emergency & Evacuation Procedures for the site, see the relevant '*site information sheet*'.
13. The team reserves the right to visit any learning, teaching, or research activity on-site at any time. The team further reserves the right to issue instructions to visitors/researchers regarding health and safety aspects or implications of visits and activities.
14. The team, and for partnership sites the partners themselves, reserve the right to pause or halt activities on the site/s if they are found to be in breach of proposed guidelines, activities, or code of conduct.
15. The team is developing a data management strategy to promote, store, provide access to, and utilise all open-access datasets related to the sites, with permission from the data owners/creators.
16. Wherever possible, data collected from the sites, with permission of the data owners, will be made available and accessible via a digital repository for research data as approved by the University of Edinburgh in accordance with the FAIR principles (to make data Findable, Accessible, Interoperable and Reuseable).
17. *If access to certain data is restricted or limited by legal, ethical, or contractual obligations, the team will work with researchers to find alternative solutions or obtain necessary permissions to facilitate data sharing where possible.*

VISITOR/RESEARCHER RESPONSIBILITIES

1. Recreational visits do not require permission. All visits related to learning, teaching and research activities require approval. In such cases, the team can provide guidance and support to ensure visits are safe and well-coordinated, as well as inform visitors/researchers of any ongoing operational activities that may affect plans.
2. If visitors/researchers are planning/interested in utilising the Forest and Peatland Programme sites for learning, teaching and/or research activities please contact the Academic Manager with an **Expression of Interest**. For partnership sites, the expression of interest will be directed to the partners for feedback. In response, visitors/researchers will be guided through site suitability, operational activities and other practical considerations that should be accounted for before submitting their proposal, research grant, site access form etc.
3. Once learning, and teaching research activities are developed visitors/researchers are required to submit a **site access form**, with relevant supporting documents. The form type will depend on the proposed activities and whether they comply with the Scottish Outdoor Access Code (SOAC). Access is not permitted until approval has been provided.
4. All visiting groups/personnel are responsible for arranging their own transport to the sites. If visitors/researchers are a member of the University of Edinburgh, transport arrangements should align with the Sustainable Travel Policy.
5. If accommodation is needed, all visiting groups/personnel are responsible for arranging their accommodation. See the relevant *site information sheet* for options.
6. Health and Safety (H&S) is a top priority. Visitors are responsible for their own H&S and that of their group, ensuring all activities prioritise the safety of staff, students, and the public.
7. If any H&S incidents, dangerous occurrences, or near misses occur, these must be reported to the team as soon as possible. Please contact the Forest Site Manager and email FPP.siteaccess@ed.ac.uk. All incidents should be reported to the university's H&S reporting systems. The University uses an online system, called 'Accidents and Incidents Reporting' (AIR) to manage accidents, incidents, and near-miss records.
8. If team resources are required to support visitors/researchers or a group visit, this may come at an additional cost to ensure staff time and resources and compensated.

9. Anyone leading Learning, Teaching, and Research activities must be competent and have a completed Risk Assessment, signed off by a senior local colleague in their work area. Then Risk Assessments must be checked and signed off by the team. Additional information, and/or risk mitigations may be requested.

10. Visitors/Researchers must ensure no activities occur in sensitive site areas based on ecological, heritage, historical, and utility constraints. A constraints map is available upon request. This does not apply to activities following the Scottish Outdoor Access Code (SOAC).

11. If approval has been granted, before the visiting date, visitors/researchers must check in with the team, at least 48 hours before the visit is due, to confirm details, and receive any site activity updates.

12. If a visitor/researchers fail to comply with the conditions specified in this agreement, the team reserves the right to halt activities until further notice.

13. All litter from visitors' own activities must be removed from the site.

14. All visitors/researchers must review the site's Emergency & Evacuation Procedures in the 'site information sheet' and follow them during an emergency. The group leader should carry a hard copy and brief the team before visiting the site. The Forest Industry Safety Accord (FICA) provides additional guidance.

15. Visitors/researchers must report medical emergencies, fires or criminal activity/ anti-social behaviours by calling national emergency services on 999, for police non-emergencies call 101, for medical non-emergencies call the NHS on 111.

16. Visitors/researchers/ group leaders are fully responsible for their own and their group's welfare. The Forest Industry Safety Accord (FISA welfare guidelines) provides further guidance in this area.

17. If vehicles are required, visitors/researchers must ensure vehicles are suitable for the site's parking conditions and the roads travelling to and from the site. See the *site information sheet* for guidance.

18. If the University's hard standing/parking is used, this is done so at the visitor's own risk.

19. Visitors are responsible for having the appropriate insurance in place for themselves and their group. If they are a member of the University of Edinburgh, university insurance can be applied for.

20. Any visits by enforcing agencies must be notified to the team as soon as possible by telephone and in writing as soon as practicable. Please email the forest manager.

RESPONSIBILITIES OF RESEARCHERS

21. Researchers conducting studies involving human subjects or environmental fieldwork must follow ethical assessment procedures. A completed ethical review, approved by an Ethics Committee, must be submitted with the site access application.

22. Researchers are responsible for ensuring all research conducted is performed in accordance with their college's/institutes' research ethics framework/guidelines.

23. If sampling is required, researchers will be responsible for keeping track of their own geolocations (ideally with differentiated GPS) whilst conducting fieldwork and avoiding any sensitive areas.

24. Researchers from the University of Edinburgh must follow the University's Research Data Management Policy, which supports making data, especially publicly funded research data, openly available with minimal restrictions as soon as possible.

25. All researchers collecting data from a site will be encouraged and supported to use an open license for their data i.e. The Creative Commons Attribution 4.0 International (CC BY 4.0). This allows users in all jurisdictions to make use of their datasets, as long as they acknowledge the data creators deposit/ownership.

26. Sensitive data, can be stored in the Universities 'Edinburgh Datavault', providing protected access. In such cases only the data owner or a nominated data manager can retrieve data directly.

SITE CODE OF CONDUCT

➢ No fires or the use of flammable/hazardous/chemical materials are allowed without the prior permission of the FPP Team.

➢ All visits should limit any impacts on nature or people. Following the Scottish Outdoor Access Code (SOAC).

➢ Gates at the site are to be kept closed at all times.

➢ Ensure all site visitors are fully equipped with appropriate clothing for the weather and activity.

➢ Do not obstruct access or endanger the safety of other site visitors.

➢ All activities must be comprehensively risk assessed and appropriate controls followed at all times.

➢ Public access must be maintained at all times, including access to the parking grounds.

➢ All litter from visitors/researcher's own activities must be removed from the site, and not at the hard-standing parking area waste units. All trash should be disposed of at the university/ visitors/researcher's relevant institute.

➢ Non-compliance with these rules may result in the withdrawal of site access approval. More serious breaches that disrupt site operations may lead to further action, including potential legal consequences for those responsible.

As the programme is still in its early stages, some forms and processes are being finalised, with more information to be shared as the programme progresses. The team is actively working to improve processes and create new opportunities, ensuring we meet the Learning, and teaching research objectives, as laid out in the Programmes Learning, Teaching and Research strategy over time. We appreciate your patience during this phase and welcome any feedback you may have.

Please contact the Academic Manager for further information or visit the Programme webpages.

THE UNIVERSITY *of* EDINBURGH
Social Responsibility & Sustainability