Title	Owner	Last Updated	Next Review Date
Safe Operations	Head of Expeditions	Jan 2026	Jan 2028

Policy Statement

British Exploring Society is committed to ensuring the safety and wellbeing of all its participants, leaders, staff, trustees and members who are subject to its duty of care throughout the delivery of any activity, residential or otherwise, in the UK or overseas.

British Exploring Society will support the positive outcomes and the safe and effective care of all expedition members through adherence to the guidelines contained in this policy and in related Standard Operating Procedures (SOPs) referenced herewith.

British Exploring Society is committed to:

- The design and implementation of a safety management system which adheres to industry best practice and supports leaders & participants to:
    - Assess and analyse risk and associated benefit whilst on expedition or training and make good decisions.
    - Foster an appropriate safety culture on all expeditions and training events which encourages all participants to be risk aware and take responsibility for their own safety and that of others.

Further Policy Detail

STANDARDS AND EXTERNAL AUDIT

British Exploring Society will always welcome scrutiny, audit and accreditation from relevant industry bodies and licensing authorities as well as seeking expert advice from a panel of technical advisors.

British Standard 8848

British Standard 8848 (BS 8848:2014) is the British Standard for overseas expeditions and fieldwork. It aims to "reduce risk from injury or illness and provides those that comply with the standard with a way of being able to demonstrate that they are following good practice to manage the venture safely" and outlines minimum criteria to support UK venture providers. British Exploring Society will comply fully with BS 8848:2014 and assist in its development where appropriate. Compliance will be externally validated by an appropriate third party. At time of writing this validation is supplied by Adventure Activity Associates as a requirement of British Exploring Society membership of the Expedition Provider's Association (EPA).

Adventure Activities Licensing Authority (AALA)

All UK activities conducted by British Exploring Society will be carried out in accordance with all relevant UK legislation. At time of writing, all outdoor activities delivered for participants under the age of 18 must be delivered by an organisation holding an AALA license and in accordance with the AALA

requirements. Where necessary British Exploring Society will secure a license or outsource activities to a licensed provider. The holding of a license requires regular external audit by a license inspector.

Membership of appropriate industry groups

British Exploring Society, in consultation with the Operations Sub Committee, will maintain membership of relevant and appropriate industry associations and groups to ensure an up to date understanding of best practice. A schedule of current memberships is below.

Expedition Providers Association (EPA)

British Exploring Society holds full membership of EPA; a membership body made up of UK-based expedition providers. EPA is the awarding body for the Learning Outside the Classroom (LOtC) Quality Badge for Overseas Expeditions. In order to be compliant, all EPA members are externally assessed by an independent inspecting body.

Institute of Outdoor Learning

The Institute for Outdoor Learning is the professional body for organisations and individuals who use the outdoors to make a difference for others. They hold regular conferences at a national and local level to share best practice.

Technical Advisors

British Exploring Society will seek guidance and assistance from recognised technical experts to support best practice and ensure the highest standards are maintained. A network of advisors will provide support and scrutiny for environmental and activity practice (e.g. mountain, jungle, water / paddling) and medical. Depending on the nature of the planned expedition(s) in terms of environment, activity and client group; a Technical Advisor's remit is likely to include guidance on; protocol and operating procedures; minimum competencies for leaders; leader ratios; leader competence assessment.
All Technical Advisors will be highly experienced experts in their field, holding high level qualifications where relevant and will have a strong understanding of youth development expeditions & outdoor learning.

Insurance

British Exploring Society will ensure that relevant insurance is held to safeguard the organisation, office and equipment, staff and all expedition participants & leaders throughout all operations.
Public liability insurance will be held at a minimum limit of £10,000,000. Travel insurance policy for expedition members will include; personal accident; medical support and repatriation; curtailment and cancellation; and equipment cover.

INTERNAL AUDIT

Accountability

The Chief Executive Officer will be accountable for all the activities that are carried out in the United Kingdom.
Whilst on expedition, Chief Leaders will have responsibility delegated to them for all operational activities from the time that the Leaders and Explorers come under their care at the departure airport until they arrive back in the UK. Chief Leaders are employed directly by British Exploring Society and are managed by the Expeditions Team with their responsibilities detailed in their contracts of employment. Chief Leaders have direct access to the CEO at any time.

The life cycle of an expedition starts with detailed planning, is followed by extensive preparation, covers the execution in the field and finishes with evaluation, so that, through objective feedback, lessons can be learned and applied to future expeditions. Schematically, the processes are as follows, with approvals being sought from and agreed by Council as indicated:

Council of Trustees

Council will receive an appraisal of the operational plans prior to the launch/marketing of an expedition and prior to delivery.
The Expeditions Team will meet/speak with the Operations Sub-Committee of Council on a regular basis who will provide scrutiny. The Operations Sub-Committee Terms of Reference provide specific detail as to the function, process and responsibility of the committee.

Authority of Council

The formal authority of Council will be sought at two stages in the expedition planning cycle:

Approval to recruit

The following notes relate to the authority of Council to consider and endorse an expedition in terms of **operational risk.** It should be understood in the context of the Expeditions Register – the process by which Expeditions are approved to recruit by Council in terms of the fundraising and recruitment context and hence the **corporate risk** associated with opening the expedition for recruitment. Only when an expedition has received both types of approval can it be opened to recruit Explorers.

Operational approval for new expeditions / operations

New destinations, basecamps and operational models will be researched by the Expeditions Team in order to satisfy a pre-approved schedule of expeditions. For details of how such research will be conducted, see "Initial Planning Report" below. On completion of the Initial Planning phase, a report will be submitted to Council, covering as a minimum;

- An overview of the area / location including notes on terrain and local cultural and physical context.
- An outline of the potential for exploration and how well the location supports the personal development objectives of BES.
- An overview of the risk and threat environment including the top 3 operational risks associated with deployment.
- A budget

On receipt of this information, Council will be asked to formally approve the expedition's operations and authorise the planning to enter the recruitment phase, provided authority has also been given via the Expeditions Register.

<u>For existing expeditions / operations</u>

Authority to recruit from an operations perspective will be assumed where the Expeditions Team plan to deploy an expedition to the same base camp and according to the same operational plans previously authorized. For this reason, expeditions to the same location can be opened to recruit subject to approval; being offered through the Expeditions Register.

In some cases, where there is a significant change in the operational model or risk profile, it is the responsibility of the Expeditions Team to notify Council of these changes and re-gain approval. Examples of where there might be a significant change include a requirement to move base camp to a new location,

the introduction of a new discipline (i.e. roped climbing on an expedition previously approved for trekking), or a significant change in the political or environmental situation at the proposed expedition location.

Approval to deploy

Within 4-weeks of the scheduled deployment date of an expedition, the Expeditions Team will offer the Operations Sub Committee a brief on the current status of the expedition. This brief will include an update on developments in recruitment and training of both Explorers and Leaders, arrangements with local agents and an appraisal on a reviewed risk assessment (see Risk Management (field)).

Based on this brief, Operations Subcommittee has delegated authority from the Chair to offer approval to deploy expeditions on behalf of Council.

A formal record of this approval must be kept by the Executive.

Initial Phase

An initial planning report will be completed to establish the feasibility and appropriateness of the new expedition destination. In most cases, this will necessitate a reconnaissance to further consider and become familiar with the specifics of the area in terms of logistics and objective outcomes. A reconnaissance may not be necessary if the Expeditions Team are able to satisfy each heading of the Initial Planning Report through internal knowledge and/or liaison with Chief Leader(s), in-country agents and/or other trusted supporters such as trustees or technical advisors.

If a reconnaissance is required for a new destination this will be undertaken by

- At least one member of the Expeditions team or contracted staff for the team.
- Ideally with the proposed Chief Leader of the expedition.
- Where a new base camp location or area of activity is being considered within a known expedition destination and many elements of the expedition will remain the same, reconnaissance may be undertaken without a member of the Expeditions Team.

At the conclusion of the Initial Planning Phase, an Area Info Pack will be created incorporating a risk benefit assessment, notes on terrain and environment, maps and minimum staffing ratios.

EXPEDITION PREPARATION

Leader Recruitment and Training

Leaders will be recruited, employed and trained in accordance with the Leader Recruitment & Training SOP. The number of leaders recruited and the appropriate supervisory ratios for technical leaders (i.e. Adventure Leaders and Paddle Leaders) will be outlined in the Area Information Pack.
All leaders will be recruited by the Expeditions Team. They will ensure applicant leaders have the relevant skills, experience and qualifications to support the expedition participants, environment, and proposed activity, this process can be seen in the Leader Recruitment SOP. .
All leaders will be screened in accordance with the Safeguarding Policy. All leaders will receive induction training to the practices of British Exploring Society in addition to expedition specific training. Elements of the training are mandatory and must be undertaken prior to the expedition, please see Leader Training SOP. Leaders will also contribute to Explorer briefings and training. In the event that a British Exploring Society staff member has the necessary skills to fill an essential leader role, which would otherwise remain unfilled, said staff member may be recruited into the vacant leader role and undergo a condensed training programme, in line with the policy outlined in the Employee handbook.

Participant Recruitment and Training

Participants (covering all non-leaders, including Explorers and Trainee Leaders) will be recruited and trained in accordance with the Participant Recruitment and Training SOP. Participants may apply individually or be supported to engage via recruitment partners such as schools and/or other youth services providers. All individuals will complete an extensive application, and have a discussion with one of the Expedition Medical Leaders in order to fully understand any support needs or risk factors. A referral form, to be completed by a professional adult (non-family member) who knows the individual well (i.e. teacher, support worker, sports coach, cadet leader etc) will be requested for each applicant. All participants will attend an expedition briefing event, and in some cases an additional separate training event in the UK. UK training will be designed to fit the expedition programme and identified support needs of the participant target group,

Effective Screening

We utilise a Screening SOP to ensure a continuous process of review of each expedition participant on the basis of the flow of information we receive about them during the course of preparing for their expedition with us. The SOP outlines where authority/accountability for decision making about participation rests. Our default position is to accommodate and adapt, but our screening always prioritises safety, and an appropriate balance between benefit and risk.

Risk – Benefit Analysis

Risk-benefit analyses will be carried out ahead of each expedition or training event. For expeditions, this will be included as part of the Area Information Pack, using knowledge gained from:

- Reconnaissance
- Previous expeditions and events
- Understanding of the participant group will be used to compile the analysis. Further information and guidance will be sought from relevant partners including
- Technical advisors
- Previous Chief Leaders
- In-country agents

There will be a multi-stage process to compile the analysis and ensure that it is based on the most up to date and accurate information, as depicted in the Risk Management – Field Operations SOP.

Logistics & Third-Party Providers

Transport, accommodation, equipment and further in-country support needs will be identified prior to the expedition. All Third-Party Providers will be subject to an assessment of their service and practice and where relevant a contract agreement will be signed, in accordance with the Third-Party Agents and Suppliers SOP.

Personal Protective Equipment (PPE)

PPE will be purchased, maintained, stored and managed in accordance with the Personal Protective Equipment Management SOP. All equipment will be fit for purpose and meet UK/EU standards, will be inspected by a competent person in accordance with regulations and will always be stored in the British Exploring Society UK stores pre and post use on training or expedition. Where equipment is hired or provided locally, arrangements will be made to ensure it is inspected prior to use by an appropriate person.

Field Expenditure and Access to Currency

Expedition teams, via the Chief Leader and other relevant senior leaders, will be issued with a number of pre-loaded multi-currency cards, enabling local purchases and cash withdrawals. British Exploring Society will maintain the ability to add (or withdraw) funds at any time as required. Field expenditure will be managed in accordance with the Field Expenditure SOP.

EXPEDITION DELIVERY

Leaders' Handbook

The Expedition Team, in conjunction with Chief Leaders, will produce a Leaders' Handbook for each expedition. The handbook will be produced in three sections;

- Part one, containing expedition critical information including but not limited to; contact details; incident management plan; communications plan; contingency planning; nominal roll.
    - In addition, part one will include the Area Information Pack which will contain a risk-benefit analysis along with pertinent location information.
- Part two, containing copies of all the relevant Policies and Standard Operating Procedures pertinent to the expedition.
- Part three, containing useful technical guidance and manuals for items such as communications devices, stoves and first aid crib sheets.

Crisis & Incident Management

Incident management plans will be tailored to each expedition. The planning will be carried out in accordance with the Risk Management SOP and will involve input from relevant parties including but not limited to;

- Chief Leaders
- Other senior leaders
- Technical advisors
- In-country agents and providers.

The Crisis Management Plan SOP details how British Exploring Society, through the function of the Duty Operations Team (see below) will manage a major incident, including support for the field team and liaison with relevant stakeholders. The Crisis Management Plan and DOT provision will be supported as appropriate by specialist external agencies.

Duty Operations Team (DOT)

British Exploring Society staff will run a 24-hour support facility known as the Duty Operations Team (DOT) during any period of expedition delivery or training. The primary aim of the DOT is to provide incident and emergency support to expedition teams. The DOT will be operated in accordance with the Crisis Management Plan SOP.

Water Safety

Any activity that takes place in or near a stream, river, pond, lake or sea will require safety procedures and may only take place in accordance with the Water Safety SOP and following a risk-benefit analysis.
The Water Safety SOP establishes the safe practice required for all water-based activities including:

1. Use of large commercial boats and ships
2. Use of small craft, including canoes
3. Swimming and operating in the water margins
4. River crossing

Medical

Consideration will be given in the makeup of any expedition leadership team for the provision of medical professionals or appropriate first aid skills. The number of Medical Leaders required on the expedition will vary dependening on the size of the expedition, prevalence of environmental risk factors and other considerations such as evacuation protocols and reliability of communications. All leaders will be required to hold a valid minimum 16-hour wilderness first aid certificate.

Each expedition will be provisioned with extensive medical equipment and drugs as appropriate for the expedition environment and participant needs.

Medical Leader responsibilities during the pre-expedition preparation and planning phase, during the expedition and post-expedition are outlined in the Medic's Guide SOP. Medical leaders will deliver medical briefings at UK training event and on expedition and will have medical 1.2.1 conversations with all participants and leaders prior to expedition.

Vehicle Safety

Expedition teams may utilise hired vehicles, both self-drive and with driver, and in extreme circumstances public transport. Leaders will manage safety whilst using transport by carrying out checks and adhering to procedures identified in the Vehicle Safety SOP.

Accommodation Safety
Most accommodation whilst on expedition and training will be in the form of tents, often in wild remote locations. Commercial campsites may also be used along with dormitory style accommodation, hostels and/or large communal indoor spaces such as a school gym.

Use of accommodation will be carried out in accordance with the Accommodation Safety SOP. Leaders will be mindful of maintaining safety both in terms of sleeping and washing/toileting arrangements, considering risk factors posed by the building itself, other site users and members of the public, as well as those within the expedition team.

Protection against Predatory and Wild Animals

The Expeditions Team will establish the specific threats and associated risks posed by predatory and wild animals in the proposed expedition area. In accordance with the Risk Management SOP, research will be undertaken to understand the specific nature of the risk, and to develop a specific plan to manage the risk and safeguard all expedition members effectively.

Communications

Each expedition will have its own bespoke communications plan, agreed between the Expeditions Team and the Chief Leader. The plan will cover: routine communications between various discrete parts of the expedition when in the field; routine communications between the expedition in the field and the office; field updates for publication on the British Exploring Society website and blog sites; and emergency communications, including contingency plans in case of equipment or network failure. Each expedition will have access to a minimum of two forms of communication.

EXPEDITION REPORTING

Reporting & feedback

Every expedition will be evaluated on its return. The evaluation will include a full debrief with the Chief Leader carried out by the expedition team and a series of written reports will be submitted by the leader

team in accordance with the Report Writing SOP. Additionally, all leaders and explorers will be given the opportunity to offer their personal feedback, which may be anonymous, via an online feedback form.

Lessons Learned SOP

All reporting and feedback, both written and verbal will be collated by the Expeditions Team and compiled into a lessons learned document in accordance with the SOP. Each 'lesson' will be categorised and an action plan developed to address issues as appropriate.