Operations Policy

The document outlines the company's operational system to support staff in delivering high-quality courses and expeditions.

Contents

Associated Policies / Plans:	**Associated documents:**
Health & Safety Policy Emergency Response Plan Quality Assurance Policy Media Management Plan	Full time staff Contract Expedition Leaders Contact Expedition Support and Evacuation (ESE) Policy Consent Forms Activity Request forms Report Forms (in H & S Policy) Feedback Forms Overseas Insurance documents Company Insurance documents Company Values & Principles

1. Introduction

The Expertise Group (EG) consists of a number of specialist companies offering a range of personal development and training programmes, both in the UK and Overseas. Wilderness Expertise (WE) is the youth arm of the organisation.

Each of the companies in the group are responsible for the administration and operation of the courses and programmes they provide, utilising the resources held centrally by the EG.

The products offered by EG are:

- Overseas Expeditions to any destination in the World
- UK based training courses
- First Aid and Medical Training Course
- Training Courses for Trainers
- Consultancy

These areas of the company operate in the Adult and Youth market.

The EG is committed to employing an integrated and preventative Operational and Safety Policy, hence these policies should be read in conjunction with each other. This approach forms part of Due Diligence and Corporate Governance that the Directors are committed to.

The following general factors are in place and form part of our philosophy:

- Safety is a culture not dogma and sits at the heart of all we do;
- Staff are trained and experienced and have a full understanding of their operating environment;
- A transparent and open, no blame culture exists for all Operational and Safety Matters;
- Mentoring and supervision is in place to develop staff;
- Staff strive to adopt relevant industry best practice in continuous professional development and networking.

The Company Directors are responsible for ensuring that the systems laid down in this document are adhered to. Regular quality checks are in place to ensure that this policy and the company's operational systems are maintained. In addition this document is made available to all full time staff and they are responsible for following the systems for their area of operations.

This document is reviewed every twelve months and after any key developments. This keeps the systems at an appropriate level in relation to the volume and diversity of our products.

The systems in place are common sense and logically laid down. They ensure both safety and quality are maintained at the highest levels, ensuring that EG continues to have a name associated with high quality, safe and enjoyable training.

2. Health and Safety Management

The Operations Director is ultimately responsible for safety and tasks the nominated Safety Officer to implement key aspects of the policies. It is, however, naive to assume that one person holds all the answers regarding safety in the outdoors. Therefore WE have outside advisors to assist and advice, not withstanding NGBs for relevant awards.

Technical Advisor	Land Based	Stuart Johnson (MIC)
Technical Advisor	Water Based	Adrian Barker (L5 BCU)
AALA	Regulations and Procedures	AALA
Consultant	Company policy and procedure	Peter Harvey (Director)
PR Advisors	Media Issues	Media Management Plan
Legal Advisor	Legal Obligations	Sue Car

To increase the awareness of the Health and Safety Policy, temporary employees will be required to sign the Health and Safety Policy statement when accepting a work contract.

Maintaining and transferring knowledge about company procedures is difficult in all companies however this is a particular challenge for WE due to the number of freelance staff employed for short periods. Therefore staff briefings; document mail outs and training weekends must be relied upon (see staff management section).

All other matters regarding Health and Safety are covered in the Health and Safety Policy and should be referred to on all counts.

3. Staff Management

Wilderness Expertise believes that it is vital to use experienced, well-qualified and well-motivated staff. In the outdoor setting the trainer must have sound judgement, full understanding and an ability to communicate with the group. Therefore we have a detailed selection process. We pay all staff well, offer training and are open to their suggestions and inputs; this promotes commitment, motivation and effectiveness.

3.1 Selection of Staff

The following systems are used when recruiting all staff:

Vetting Procedure

- Initial Phone conversation;
- Request for CV and covering letter
- Interview with SBM or Trainer Liaison Manager
- Request: CRB Clearance (E) documentation / Copies of all relevant qualifications/ Copies of First aid certificates / List of references;
- References sought (1 written and 1 verbal) and ECRB application completed
- Attend a Trainer Induction Day / Weekend
- Mail out enclosing: Health and Safety Policy, Job description, Contract, New staff pack;
- CPD plan devised and arranged
- monitor and observe with group if possible;
- Approval given by SBM and/or Trainer Liaison Manager
- Re evaluation and permanent staff assessments take place every 6-12 months.

This lengthy system ensures that the staff have both the philosophy and ability to train at the standard demanded by Wilderness Expertise.

Overseas Leader Matrix The Leader Matrix relates to technical qualifications and experience. This alone does not suggest competence in leading overseas expeditions. In order to gauge the suitability of a Leader, assessments shall be made with regards to the potential Leader's character, personality and previous experience of travelling within Developing World countries in conjunction with this Matrix. Therefore other skills alongside technical expertise are necessary additional competencies for the outdoor leader who wishes to lead an overseas expedition. A person who is qualified by experience but does not possess NGB qualifications may be appointed as a Leader provided that: a. the experience is relevant and verifiable; and b. the experience can be judged to be above the level needed to gain the appropriate NGB qualification.				
Expedition Activity Experience	**Regional knowledge**		**Core Competencies**	**Essential Knowledge and Additional Experience**
Demonstrate experiential expertise in areas relevant to planned activities: • Treks • Mountaineering • Rafting • Caving • Cycling and Mountain Biking • Canoeing • Working with animals • Vehicle • Diving • Swimming • Cultural/Social Projects	**Demonstrate experiential expertise in regions relevant to intended environment:** • Mountain • Desert • Jungle • Water-based • Tropical • Polar • Developing World • Altitude	**Essential Qualifications:** • First Aid • E-CRB check **Demonstrate further professional development through:** • APIOL • NGB Awards (MLTUK) • BCU Awards • BSAC / PADI Awards • OSSM • Coaching Awards • NVQ Awards • Other relevant Qualifications		**Demonstrate understanding and ability in assessing:** • Transport systems • Medical facilities • Emergency support • Guides • Accommodation • Crime • Gender • Religions • Leadership Style • Problem Solving • Crisis Management • Novel Situations

Employee / Freelance trainer Records

Wilderness Expertise will hold on record the following documents as Pdf's on a secure electronic system:

- CV & References
- Qualification Certificate Copies
- CRB Check (E)
- Induction training record
- First Aid certificate
- Medical form
- CD reports
- Professional Development Plan

To monitor this all staff will have an internal file with the Staff Check list attached to it (see extra-net database).

3.2 Staff Inductions

As outlined in the introduction it is vital that all staff working on an activity are fully informed of company procedures and policies. Any information, which is sent out to a staff member, should be recorded in their Staff File. This will provide a check and record of the information sent. The following Induction system should be used.

Initial Employment briefing by SBM:

- WE Values and Principles
- Contract and Letter of engagement
- E CRB Form completed and Copy of Proof of Identity
- Health and Safety Policy (Read and Sign)
- New Staff Pack / Guide
- Emergency Response Plan Discussion

3.3 Staff Briefings for UK Work

a. Course information pack (See Section 4)

b. Formal briefing by telephone or ideally in person

Aims of the Course:
E.g. to create a safe environment for young individuals to develop using their experiences in outdoor activities

Basic School trip info:
Discipline and behaviour control via teacher
Trainer primarily controls safety and the activity

Safety:
Policy, Guidelines, Qualifications, Medical forms, First aid and Hospital Cover, Feedback route

Reporting / comments at end of trip

Informal discussions
An opportunity to raise any questions and discuss individuals in the group

Full time staff or regular trainers will receive all amendments to company procedures. In addition specific activity guidelines are available on request by the instructor. These are normally direct from governing bodies of the activities e.g. SPSA / SPA guidelines for Climbing.

3.4 Expedition Leader Handover

This is an important step in the ops process. The discussion will set the tone of the trip and ensure that there is a seamless transition between the office and field team.

The objective is to ensure that the leader team understands:

- The philosophy
- Risk management process (specifically the control measures)
- Need for flexibility
- The ownership and responsibility the leader has

In the back ground we must reinforce the support we supply 24/7, we do care about the trips and the leader is our critical link. We have on-call: a doctor, director, on-call rep who can help answer and guide decisions as well as the team that designed the trip and made the bookings.

The leaders need to understand that they can pick up the phone when ever they have a concern, judgement call or conflict. The end state is that the leader and leader team feel supported by the company, values and are aware of their boundaries and responsibilities.

Who:
A company director or the Director of Wilderness Expertise must undertake the briefing and handover to the Leader. All members of the overseas Leadership team should be present for this briefing (i.e. to include assistant leaders, liaison teachers and additional adults. This meeting takes place at the beginning of the Build Up day, at a mutually agreed location – normally the school. This process will be supported by an expedition manager who will have compiled the paperwork.

How:
The style is flexible to the leader, team and the situation. The meeting moves from broad ethics to factual handover with the Director slowly stepping back as the leader takes over. The end state is the WE fulltime team enable the leader to do their job. This normally means that once the formal handover of paperwork has taken place, the leader will take over and while the WE fulltime team are in the background, they will organise for the kit and in-country budget to be sorted and checked. Meanwhile the director will meet parents and be at the beck and call of the leader until they are satisfied with the complete handover.

Preparation:
Pack car with: paperwork/ full kit / spare kit / repair box
Prep history of UK1 & 2 plus list of past incidents / accidents / issues
Check leader file and that we have 100% group paperwork and payments
Look smart and arrive early!

How long:
60 min Leadership team brief
60 min Parents meet and greet
60 min Kit check
15 min Wash up with Leader

What:
The content is outlined by bullet point below. Additional elements may need to be expanded on as required.

Step 1 Ethical Perspective:

The company: Values

The trip: Concept and objectives – personal development not a peak

Style: Empower and give responsibility. Use creative reviewing techniques to encourage team to develop, take away tangible lessons - how often is up to leader.

Group issues: Previous feedback – concerns (UK 1, UK2 and teacher feedback)
Staff issues (No EL – staff relationships)
Happy with team/leader/teacher roles and responsibilities
Contact with home: emailing parents – potential problems
Therefore leaders need to communicate proactively

ELP: Ensure EL has brought ELP & MELP with them otherwise re-issue
Talk through each page esp. PXR
30 labelled digital photos

MELP: Medical drug protocols (EL must contact doctor before use)
Cipro use
Antibiotics caution
Raise issue on drug names v. name in pack, brand names change
Medical cards – to be completed on build up day by Leader on 1:1 with student (liaison teacher in attendance). If there are conditions that have not been previously declared the leader must call WE before departure as there are insurance implications
Medical kit (talk through items)

Step 2 Nuts and Bolts:

SELP: Specific Expedition Leader Pack includes pre-paid bookings, budget and accounts forms - one for leader, one for team
Contents of Leader and Student Packs
Itinerary (check leader happy – destination updates e.g. security)
Guidebooks from WE library and any background info WE may have

Contact numbers
Clear line between what the UK office has and has not booked/pre paid
£ breakdown – if anyone starts asking where the money went and becomes a group issue, call and we can email a breakdown.
Happy to explain this.
SELP to include a template for personal reports.

Finances: Expedition & contingency funds & calculator
Contingency is just that a contingency to be brought back. It is not the team's money and has not been included in the Expedition price that they pay.
Expenditure of unauthorised contingency, unless exceptional circumstances, will be deducted from final pay as per contract.

Your group budget is the total sum of money that you have to spend on Expedition. The costed itinerary is a guideline as to how that money may be spent. Please note that prices can fluctuate and there may be additional in country costs. Part of the team's challenge is to manage their budget to cover all eventualities, if clever they can make savings etc and use for a treat at the end. Don't just turn to the contingency,

Safety: Judgement and common sense
Never left alone / or only EL with 1 student
Inform and educate the group of risks
Document key discussions
Swimming: quals. and kit
Kit – fuel bottles – make sure empty on flights, leave lids off due to pressure. Use lots of soapy water to get rid of the alcohol smell before flights esp international.
Near misses from the last few years
Relationship and authority issue – not just about popularity
Avoid ultimatums e.g. smoking (use the teacher)
If anything is lost or stolen a police report must be obtained within 24 hours for insurance purposes.
* Highlight applicable past incidents (See Incident logs)

Comms: Systems in place, use them
Call in procedure and consequences of missing a call in
Always call the on-call number not the office even during work hours – anyone can pick up the phone in the office and may not necessarily know if there are messages to be passed to the team etc
If a personal mobile phone is used on Expedition an itemised list must be presented with the final invoice in order to be reimbursed.

Updates: Email a paragraph to info@wilderness-expertise.co.uk mid expedition. The due date is noted on your itinerary, parents love to receive these and are on the ball if late.
All/any updates received will be uploaded onto the taems blog page on the WE website
Leaders will receive an email approx 3-5 days prior to return flight reminding them of what they will need to have ready for collection at the airport.
Leaders must forewarn WE of any serious medical issues BEFORE flying home. WE will have a representative at the airport and will be able to discuss this with parents, face to face.

Post Exped paperwork: PXR, individual reports and MAX 30 LABELLED photos to be returned to WE within 4 weeks. Many students use individual reports for UCAS etc, need to allow for editing time etc
NOTE – PXR written for WE, personal reports written for students. Personal reports must be constructive and not inflammatory.

Please collect any useful info, maps, hostal cards etc for use at future UK1/Itinerary planning sessions

EL Obligation: Safety – your responsibility

3.5 Contracts / Evaluations

Full Time and Part Time company staff have formal contracts as employees and a standard trial period is written into the contract.

Expedition Leaders have a formal contract for services which is caveated by a positive performance on UK1, positive references, approval by the school and a clean E CRB.

Freelance staff in the UK have formal contracts for services which are activated by a LOE (Letter Of Engagement). At the end of the Engagement period the Course Director or Trainer will complete a review with all staff to highlight any safety concerns, problems or possible improvements.

3.6 Staff Development

All staff are offered numerous opportunities to improve their professional and personal qualifications. These opportunities are raised during various Personal Reviews and Continuous Professional Development Plans.

Financial assistance is offered annually and all staff are encouraged to be self motivated in this area. WE believes that a work force that is invested in will provide a higher quality and more effective service to clients and colleagues. In addition freelance staff are incentivised by the trainer levels system.

3.7 Specific Staff

Expedition leaders

Expedition Leaders (EL) have a differing degree of responsibility and are therefore required to go through a more detailed selection. Wherever possible, they must have in-country experience and they are required to attend the Leader Briefing training, where a senior staff member will assess their suitability. All leaders sign a formal contract with the company and recommendations are also sought from companies and credible people within the outdoor industry. The issues concerning Expedition Leaders are detailed in Section 4.

4. Overseas Expedition Management

Operating in a wilderness / remote region is not without risk, particularly in developing countries. However, The Company strives to use 'industry's best practice' to minimise the potential hazards. The base line for these practices are the principles and recommendations laid down by the Adventure Activities Licensing Authority (AALA). WE is also able to self declare compliance to BS 8848 – the specification for the provision of visits, field work, expeditions, and adventurous activities outside the UK. The company also recognises that there are many other sources of best practice and will continue to employ the highest possible standards.

Wilderness Expertise also states that while it is vital to accept that expeditions produce anxiety and stress this does however enable the students to truly develop. We must not create a sterile, overly regulated environment where individuals only 'view' other cultures from afar, rather we should create an environment that enable students to interact and experience new cultures and new sides to their own character in great depth. If we are to succeed in providing student with an opportunity of a life time we must not shy from the opportunity to experience life albeit in a safe and 'controlled' manner.

4.1 Expedition Build-up

Destination selection

All expedition destinations are, before presented formally to the client, researched from various sources including country experts, Foreign Commonwealth Office, in-country agents and feedback from previous expeditions and assessed for their suitability for hosting an expedition, bearing in mind the nature of the group.

Situations do change and for this reason Wilderness Expertise can alter an expedition destination up until the final moment if the Foreign Commonwealth Office dictates.

For new destinations, or destinations where expeditions have not recently gone, a threat analysis will be undertaken to assess the risk in that country. Sources included UK Embassy, FCO, Red24, as well as additional online research.

Resources
The process for requesting equipment is at V:\Equipment Resources\Equipment Rental and should be read in conjunction with this policy.

4.2 Sales process
The school sales process starts with a teacher liaison visit where an appropriate destination is chosen (Liaison Pack provided) and is followed by two presentations - one for pupils and then one for parents and pupils together, ensuring that expectations are set. At the end of the Parent & Pupil presentation, information packs are distributed with a company brochure, ATOL leaflet, insurance key facts document, country information sheet, our Terms and Conditions with payment terms and an application/medical form. A copy of the (See insert 3)???. For adult expeditions, one presentation is arranged and the same information is handed out.

4.3 Leader
The expedition leader must hold relevant, recognised qualifications in line with NGBs. Leaders will also hold a minimum of Advanced First Aid. All Leaders are also Enhanced CRB screened and ideally have experience in leading within the destination country (ies).

The fundamental quality of all leaders is their judgement. To that end, all leaders will have worked and been assessed by the expedition manager but also signed off by a company director to ensure they are suitable to lead a student expedition. An Expedition Leader must have the ability to carry out dynamic Risk Assessments during the expedition. They must possess the skill, forethought and the ability to appreciate hazards and risk prior to their exposure to the team.

The leader has three other key aids that enable him to manage the expedition:

a. Team Training i.e. UK1 & UK2
b. The Itinerary (which includes their input)
c. The Risk Assessments and Emergency Response Plan
d. Expedition documents in section 4.13

The leader's involvement in all these processes ensures that they have a thorough knowledge of the team's limitations, particular hazards and the feasibility of a fast evacuation.

4.4 Team Training
Specific training objectives must be completed during UK 1, UK2 and the Build Up day. These are laid down in the Training packs.

4.5 Group ratios
Student – adult supervision ratios are of vital importance to ensure safety. In addition large groups can create a negative impact on villages and cultures they visit. Therefore Wilderness Expertise will not cater for groups over 16, unless they are operating in remote areas where cultural impacts are limited.

The AALA and NGB lay down clear recommendations for instructor ratios. These must be adhered to for relevant activities. Therefore a group normally consists of one Leader to 12 pupils with an additional adult. The company also adheres to the LEA OEAP guidelines on Expedition Ratios.

Supervision:
For a long expedition it is impossible to provide **direct supervision** 24 / 7. However leaders must ensure the supervision is adequate for the group, activity and location. This is completed via the written risk assessment and continual monitoring of the group.**Time-off or down-time does not exist!** Poor supervision is a causal factor in most incidents. If you are uncomfortable increase supervision.

Not all adults can supervise students. Only competent, reliable and background checked staff should have unaccompanied access to students. Often additional adults may increase the risks. There are other ways – buddy-buddy system, tight group management, altered accommodation, altering activities and stopping activities. Obviously a student should never be left alone or with an unknown adult.

4.6 UK1
UK1 consists, in most cases, of a 2 day session, normally held at school. The focus is getting the team to work together and designing a realistic itinerary to budget. The expedition leader and the teacher or main clients involved are present. It is our aim to ensure the Expedition Manager attends the itinerary planning session. A member of Company Staff are present during this procedure if the expedition Leader is doing their first expedition for the company, giving an opportunity for observation and assessment.

After every meeting the teacher or main client are encouraged to feed back on the Leader and the process, resulting concerns can then be addressed.

4.7 UK2
UK2 normally consists of 3-4 days in wild country. Key expedition skills are put across and developed as well as ensuring that the team is working well together. These will include both the general practical and theoretical elements, as well as areas specific to the location and mode of travel in which the group will need to be proficient at.

4.8 Pre-Departure
Build Up is a vital part of the process, it allows time for group and personal equipment to be checked, and for the Expedition Leader to be verbally briefed on any remaining issues. The topics for the brief are outlined in section 3.

4.9 Itinerary
The expedition team and the Expedition Leader design the itinerary at the first training weekend (UK1). The leader and Wilderness Team then develop this initial draft. Safety issues and economic concerns are discussed and if necessary alterations made. Once this is confirmed the revised itinerary is outlined to the team.

The expedition team also completes a discussion based risk assessment of the itinerary at the second UK training weekend (UK2).

The experience of the Expedition Leader coupled with the knowledge within Wilderness Expertise ensures the team's objectives are achievable within the confines of safe practice.

4.10 Activity Risk Assessment

Throughout all stages of the Expedition process, Risk Assessments are carried out. This ensures those dynamic variables such as weather, group energy, morale and behaviour can be assessed. Flexibility within the programme enables the Expedition Leader to alter UK training and the expedition itinerary to adapt to these changing factors. This may be as simple as putting in a rest day to 'recharge batteries' before a final ascent or altering the expedition objective due to poor teamwork or acclimatisation.

4.11 In Country Links and Agents

The Expeditions are normally supported by an in country agent to aid logistics and pre expedition planning. This relationship also extends to aid and assistance with emergencies, itinerary design, organising projects and making bookings whilst acting as a support for the expedition leader when in country.

4.12 Emergency information

The expedition leader, with the support of the Wilderness Expertise team produce an expedition specific Emergency Response Plan, which is carried by the leader and also help by On Call Staff. This document acts as the basis for all emergency procedure.

4.13 Expedition Documentation

The following documents make up Wilderness Expertises management of Overseas Expeditions.

a. Expedition Information Pack (Parents and Students)
   - Team names
   - Detailed Itinerary
   - Methods of Communicating
   - Full Equipment list
   - Emergency Contact details in / to the U.K.

b. Expedition Leaders Pack. (Teacher, On call staff and Leader)
   - Generic **(ELP)**
   - Expedition Philosophy
   - Accident report Forms
   - Risk Assessment Forms
   - Report Forms
   - Emergency Response Plan

   Medical **(MELP)**
   - Drug Guidance notes
   - Medical Guidance notes
   - Casualty Cards

   Specific **(SELP)**
   - Nominal Role / Itinerary
   - Emergency Contact details in Country
   - Call in times / Medical Forms
   - Flight Ticket / Passport Copies
   - Financial Details
   - Next of Kin Details
   - Communication Plans
   - Emergency School Contact Numbers
   - Copy of Insurance documents

- Evacuation Plans (Land based, Air, with / without external aid)
- Key contacts (Evacuation / Medical treatment)
- Actions / Considerations (Evacuation Triggers)

These documents provide full details of the procedures in place for all Overseas Expeditions. Specific details are compiled for each individual trip to cover the activities being undertaken within the country.

5. Overseas Expedition Support

All Expeditions have the following services available to them. In addition each expedition has a unique set of procedures. These specific details can be found in the Expedition Leader Pack. The Emergency Response Plan is designed by the Expedition leader and also used by the on call staff. A copy is attached see insert 4.

5.1 Wilderness team 24hr Cover

The company provides 24hr on call cover throughout the Expedition period. The primary contact will be made by SAT phone to the on-call number. The Staff member who is on call will provide the necessary support to the Expedition, and if required call in assistance from the company. Such assistance may be in the form of ECGs Expedition doctor, Directors or simply some admin support.

5.2 Communication Check in times

All our expeditions carry Satellite phones. This enables two-way communication for all expeditions in the case of an emergency. To ensure that all expeditions are progressing well pre set call-in times will update the office in the UK. 'Missed Call in time' action plans will be discussed with the Leader at the Handover. This method of call-in in will also allow non-urgent 'two way' messages to be relayed. Urgent Messages can be relayed from the expedition team to their parents via the office or emergency number. This information will be relayed to the parent(s) at the next appropriate time. Messages from the UK to the expedition team can be passed to the team via the in-country agent or other agencies outside of these calls. This system can take time. This depends on the phase of the expedition and may involve a team from the in-country agent trekking in to the team's location. In addition Police Radio nets, boat merchants and inter village communication can be used to pass simple messages.

5.3 Medical Assistance Company - 24hr Support

The expedition insurance is underwritten by Campbell Irvine for 2008 Expeditions and Stuart Alexander for 2009 and future expeditions. They have a 24-hour contact line (365 days a year) and can offer the following services. They are in place to support the on call team and leader and ensure that all-possible medical aid and evacuation options are provided.

- Health Advice: Medical Information Line / Nurse Triage Service
- Medical Services in the region
- Evacuation options
- Repatriation advice and co-ordination

The MAC will also act as advice line for the On-Call Staff.

The MAC will cover all cost of the evacuation once the insurance details have been quoted. However some initial expenditure may be required to get the casualty and / or team to a basic communication point to call the MAC.

5.4 Contingency Funds

All Expedition Leaders carry a contingency fund, which should only be used in an emergency. This is primarily to enable evacuations to flow smoothly. If this source is exhausted, additional funds can be wired from the UK to the In-country agent or to an appropriate hotel or bank.

A number of key limitations should be noted:

- The evacuation plans in the Expedition Leader Pack have outlined the appropriate external evacuation methods. However bear in mind that Helicopters, if available have a flying ceiling of on average 14000ft.
- It will take time to initiate the evacuation.

6. UK Course Management

6.1 Course build-up

Initial liaison

The first meeting or telephone call aims to isolate the clients needs. General options are discussed and the meeting or telephone call is followed up by a firm proposal with course options. Client exact 'wish list' must be ascertained so a second meeting may be required.

Confirmation

Once the client has agreed in principle, the Itinerary is developed and the client is invoiced with a contract sent. At this stage Medical Forms and Consent forms are mailed out as appropriate although in many cases the client will have their own copies for the students which . This is not completed for Wellington College (the Sanatorium is to be contacted for all up to date medical details). Copies of all medical and consent forms will be requested and kept on file for the on-call safety system.

Course Director confirmed

The Course Director and the trainers are the most important aspect of any UK programme and so a Course Director will be selected and booked as early as possible. The CD will then have a large input with course design and meeting client expectations and may complete a venue visit if appropriate, meet with the client, review the programme and decide on the kit they will require for the course (see below).

Resources

The process for requesting equipment is at V:\Equipment Resources\Equipment Rental and should be read in conjunction with this policy.

6.2 Course Documents

The key document used on the Programme is the 'Course Information Pack (CIP). This is given to the Course Director, trainers and teacher / group leader. It is made up of the following details:

Course Information Pack

(Trainer, Group Leader/ Teacher, Head Office, On-Call representative)

- Nominal Role
- Outline Plan
- Stand by activities / contacts on route and in area
- Timings

- Contact details for Group and School
- Contact details for CD and trainers
- Staff biographies and details on relevant skills for the particular programme.
- Roles and Responsibilities
- Medical Forms (if appropriate)
- Directions / Maps / Travel route / Walking Route Card
- Vehicle breakdown procedures (found in cars)
- Receipt management
- Food Menu / Equipment list
- Feedback form
- Nearest A & E contact details and maps
- Accident / near miss form
- Risk Assessments
- Emergency contact details

Additional information for the Course Director

- Post Course report template
- Previous couse reports (if applicable)
- Venue recce reports

The above information should be read in conjunction with the UK Trainer field guide, Ops policy and Health and Safety policy

6.3 Course Support

24hr support

The company offers a 24-hour on-call system via an emergency number. The on-call staff will respond to the call immediately and initiate appropriate response. Further staff will be notified and moved to the group's location, if appropriate. In addition to the additional on-call staff there is a secondary back up and on-call trainer.

Escape routes

All walking groups will carry a route card and spare map with escape routes outlined. A responsible individual should hold a copy of the route card.

Medical kit & Training

All trainers hold appropriate medical qualifications. These are outlined in section 7.1.

Vehicle recovery

All company vehicles are covered by Green Flag assistance. However if we are using external minibuses it is vital to check the breakdown cover before departure.

Company Director to site

In the event of an emergency a company director or their representative will move to the location if appropriate.

6.4 Communication / Reporting

Communications

Groups will carry several means of communication depending on the activity, but a mobile phone will always be carried. Report times are laid down and agreed in the CIP (Course Information Pack). Mobile phones are not to be relied on. Therefore landline communications are depended on for the CIP check in times.

Check in times
The CIP states check in times for all groups in the field. This enables the office to be sure that all activities are going to plan and that the group is safe. Failure to call in will initiate a response as outlined on the Emergency Response Plan.

7. Medical Cover and Rescue Equipment

First Aid Qualifications
All activity trainers are First Aid qualified. The level of training is a minimum of a sixteen-hour course required by their sporting national body (e.g. MLTB).

Medical Kits are filled according to Health and Safety guidelines as laid out in First Aid at Work (Health and Safety (First Aid) Regulations 1981 and guidance). Trainers will follow these regulations.

Medical information in the trainers packs cover the emergency procedures as laid out in the company Health and Safety Policy.

At all camp sites the students will be briefed to the location of the first aider on duty and safety area in case of fire. This first aider will be qualified to a level no less than an 8 hr (Appointed Person / Lifesaver) Course.

Medical Kits

Rural Groups
Each team will carry a Basic Med. Pack kit and the means to stabilise, transport (500m) and protect a casualty. The Basic Med. Pack (BMP) will have a small First Aid 'Aide memoir' and Casualty Card.

UK Based Leaders
All leaders in the UK will carry the Trainers Med. Pack and the means to stabilise, transport (500m) and protect a casualty. The leader will also carry a Pager or Mobile phone. The Trainers Med Pack will contain an Evacuation Guideline, Casualty Card and Contents List as laid down in the trainer handbook**.**

Remote Expedition Leaders
All leaders operating in remote areas will carry an additional Expedition Med. Pack. The leader will carry means to communicate in an emergency and have equipment appropriate for an evacuation by the team or external group on foot or air. Signalling methods should also be carried. The Expedition Med Pack will contain medication that should not be made available to the group and therefore must be carried by the leader alone (Contents sheet enclosed)

8.1 Insurance
All overseas trips are individually insured by Cambell Irvine or Stuart Alexander The premiums are set depending on length of itinerary and destination.The travel policy is under written by IPA and Lloyds respectively, see Emergency Response Plan (Insert 4) for full details. A copy of the standard expedition insurance is attached see insert 9.

Vehicles
The company has a vehicle insurance policy via Norwich Union. This is fully comprehensive for any driver which ensures there are no loopholes.

The company insures five vehicles: Landrover Defender 90 and 4 x Scoda estates

8.2 Financial Protection
The Company holds its own registered ATOL Licence for overseas expeditions giving financial protection to all clients during the expedition process. Flights are booked though through Wexas Travel Ltd who also hold an ATOL Licence.

8.3 Recording of Accidents and Incidents
For all recording of Accidents / Near Misses see Company Health and Safety policy Para 5 and 7.2 and the guidance laid down in that policy must be followed.

Internal auditing of all incidents and near misses take place on a monthly basis and are acted on accordingly.

9. Quality Assurance

Setting expectations at the correct level and listening to the clients needs are the fundamental aspects of quality control. Therefore it is vital that all products are designed with the client and tailored to his / her requirements. Safety and quality go hand in hand in producing effective products.

9.1 Instructor input

To ensure the product is designed well we use the instructors to aid in the Planning Stage / itinerary design. The instructors know the area well and have a vested interest in producing a good product. In addition if feasible it is desirable to allow the senior instructor to meet the client prior to the activity taking place.

9.2 Feedback routes

To monitor this process all courses have feedback forms and testimonial sheets distributed. These are held on file and serve as marketing material and guidelines for future products. These are given to all involved from students, teachers, participants and staff. A copy of this form is laid out in insert 8.

9.3 Quality Assurance scheme

Quality Assurance (QA) is essential to every part of our business, not only in terms of the enjoyment of our clients, but also their safety and education. Our aspiration is perfection, and the route to perfection is by instilling a culture of quality assurance through everything we do. Thus quality assurance should not be a burden, or extra work: It should be a natural part of our every day wish to make things work better.

With a sound culture of quality assurance, we can continually improve our products and levels of service. Each Satellite Business Manager (SBM) naturally strives to constantly better his/her business's performance, therefore it is a natural fit to devolve ownership of QA to the SBMs. The culture of quality assurance cannot be imposed, it must be adopted.

The QA policy is overseen by the QA Co-ordinator. The Co-ordinator's role is to collect significant feedback from across the satellite businesses in order to detect any company-wide patterns, and to ensure that company-wide standards are always improving. The QA Co-ordinator can also help SBMs to implement the QA policy in their satellite business by offering advice and support. It is not the role of the Co-ordinator to impose, implement or police the policy within individual satellite businesses.

We have ambitious goals: Through monitoring and improving our own standards of products and delivery we also hope to raise the general standards across all our industry sectors. To do this we must lead the way both in innovating new ideas, and acknowledging and responding to the experiences (positive and negative) of our clients.

There are three critical components of this QA policy:

- **client care**
  1. this is the way we look after our customers, trainers, part time staff and full time staff
  2. it encompasses communication with our clients and product design

- **staff skill**
  1. this is the way we ensure that the staff delivering our products have the right skills (both 'hard' and 'soft') to do so effectively

2. this is also the way that the style and ethos of the company is conveyed through the delivery of our products on the ground

- **practical implementation**
  1. this is the recommended steps that SBMs take in order to monitor the QA of their products and services
  2. this also includes the central monitoring of company-wide trends in QA

The following policy outlines these elements in detail.

9.4.1. Client Care

We consider everyone we interact with as clients. The key clients are customers, freelance staff, part time staff and full time staff. As a group of companies we have a large proportion of repeat sales and client referrals due to our strength in client care issues. Client care encompasses all the ways in which we interact with our clients, written or verbal, and also our success in tailoring products to each individual customer.

The elements of our work which come under the client care banner are:

- Client liaison: written or verbal communication, marketing material
- Programme/solution design
- Personal development content (where applicable)
- Resources

We believe in long-term positive relationships with all our clients. In order to achieve this we must be open to feedback (both positive and negative) at all times, and respond by improving performance.

Policy which addresses Client Care

Our aims are to:

- Gather, reply and acknowledge all feedback
- Discuss the feedback's impact at the present time, for future courses and for individuals
- Evolve a mutually agreeable solution to any concerns
- Give feedback on our actions to all involved
- Record all feedback outcomes and actions
- Improve Business Unit and company-wide systems and policy from the feedback gathered

These are achieved by:

- Course Director reports
- Client feedback forms
- Staff feedback
- Verbal reports to EG staff
- Direct observation

Feedback Procedure

If at any point during the Expedition process parents have cause for concern, they are asked that it be put in writing to the Expedition Director at the offices of Wilderness Expertise. If there are any complaints following an expedition these need to be submitted, again in writing to the Expedition Director at Wilderness Expertise, within 28 days of the return of the expedition.

The Endpoint
Continual improvement in our understanding of client needs, communication with our clients and design of our products.

9.4.2 <u>Client care guide</u>

Airport Client Care

One of the few times parents see Wilderness Staff 'managing' their children is at the airport. It is an opportunity to show:

Professionalism
(Read up about the trip and any important correspondence ON-CALL pack
Control/efficiency
(Ensure the group and bags are managed by a Student rep)
Care
(Ask injured students how they are etc)
Empathy
(Support the parents and re-assure)

Plus we need to support our Expedition Leader. Do not step on their toes – stand back but be keen to help. Talk to him/her for direction ASAP. It is a critically important job, be early and stay late – client care is the underlying principle.

Expedition Arrivals

Ensure you have read the ON-Call pack and any critical information
Take spare bags to load kit into and ON-CALL pack
Take WE Logo on a Board – to display for Parents to locate you
Call to confirm arrival time – even if delayed turn up at given arrival time
Be obvious and chatty
Single out any parents who's sons/daughters have had difficulty on expedition
Get group of parents together
Once group through get 1 student to unload and collate kit into your bag – tick off kit
Wave off group when all kit is in
Debrief Teacher (over coffee)
Debrief Leader (over coffee)

9.4.3. Staff Skill

Staff skill is key to delivery of our products and services. "Skill" is difficult to define, but encompasses both the technical and interpersonal abilities that the staff member needs to deliver our product and convey our company style and ethos effectively.

The term "staff" encompasses freelancers, part time staff and full time staff. See section 3 of this document for details. The critical areas to review are:

Staff Induction
- To the company site and office as appropriate to the work the staff member will undertake
- To the company resources as appropriate to the work the staff member will undertake
- 3 month contract review for part time and full time staff

- Understanding of the code of conduct (acknowledged by staff signature)
- Staff information pack

- Staff Mentoring and Training
    1. Supervision by a senior member of staff until competency is assured
    2. Personal development plans for mentees/trainees
    3. Development encouraged but not pressured
    4. Adequate resources for mentoring/training allocated

- Deployment: Matching the right member of staff to the job
    1. Suitable for the client group
    2. Suitable for the site
    3. Suitable for the activity
    4. Suitable hard skills and/or qualifications
    5. Suitable style

- Continuing Professional Development (CPD)
    1. CPD planning for all staff

- Direct Observation
    - Observation of staff in action

The Endpoint
Professional Development for all staff, backed up by firm action if required.

9.4.5. Policy Implementation

Responsibility for the implementation of quality assurance throughout the company lies with the SBMs. The following guidelines are intended as an indication of how the SBM may wish the QA within his/her business to work. Each business is different, and therefore a different approach to QA may be required.

A key principle is that *all opinions are valid, irrespective of source*. The SBM may choose to apportion different weights to different opinions, according to the level of qualification the individual has to offer that opinion.

For example, someone who has never paddled before may have an opinion that the kayak instructor was not teaching a group a particular paddle stroke in the correct way. The SBM may choose to give very little weight to the technical knowledge of that individual as he/she had never paddled before. However the SBM may ask him/herself why that individual came to form that opinion, and what group dynamic may have been generated to give that impression. The individual may be perfectly qualified to comment on group dynamics, how well the group was engaged by the activity and the overall enjoyment of the activity.

So each opinion expressed must be noted and weighed against the opinion-giver's background and technical expertise. Everyone has a right to an opinion, and all opinions are valid.

a) Day-to-Day QA

During the normal course of business SBMs may use various channels to collect feedback for *client care* elements:

- Course Director reports
- Client feedback forms
- Staff feedback
- Verbal reports to staff

All feedback should be noted, acknowledged, considered, discussed and acted upon as necessary. Significant feedback (positive or negative) should be reported to the QA Co-ordinator for tracking.

SBMs should also implement the *staff skill* policy elements (as outlined above), encompassing staff selection, induction, mentoring/training, deployment and CPD.

b) Every Quarter

i. Observation Visits

In addition, every quarter (or equivalent) SBMs may identify one opportunity to observe the delivery of their product on the ground. The principles of this observation are as follows:

- Observation aims to record what's actually happening on the ground
- Anyone may observe
- Observation is just that – objective and dispassionate – opinion shouldn't come into it
- Observations can last any length of time
- bear in mind that the period of observation should be representative of the entire delivery of the product – this can be difficult to gauge if the observation is very short

Being observed can be stressful for all concerned. SBMs should bear this in mind, and ensure that the observation is handled appropriately with all parties. SBMs should take time to explain what's involved and the philosophy behind our policy to the member of staff being observed, the observer and any other interested party. *In particular SBMs should take care than the observer is adequately briefed on his/her role.*

Observers should record their observations using the Observation Record that follows. These observations may be shared with the member of staff being observed if he/she wishes. No comment should be passed on any observation, however any disputes of observations made should be noted.

The SBM should evaluate the Observation Record with the observer, and determine what weight to give to any technical observations according to the observer's technical expertise. The SBM should then feed back the observations to the member of staff observed, and discuss any issues that arise. This feedback process can be difficult, especially if there is negative feedback to be handled, and SBMs are strongly encouraged to seek the support of the QA Co-ordinator, who will ask a senior member of staff to help as necessary.

When an Observation Visit has taken place, the SBM should notify the QA Co-ordinator and report any significant feedback.

ii. Paperwork Audit

The SBM may take the opportunity of an Observation Visit to undertake a fuller audit of the product delivery. The QA Co-ordinator is available to audit all paperwork involved with the delivery (e.g. information packs, emails, instructions to trainers, itineraries, emergency response plans, feedback forms, CRB checks, trainer qualifications etc.), and SBMs are encouraged to make use of this facility as often as possible.

The Endpoint
In all cases a full paperwork audit and observation visit, reported back to the QA Co-ordinator, should occur once each quarter (or equivalent, for seasonally biased businesses). This is in addition to the day-to-day QA as outlined above.

c. QA Process Summary

-Course Director reports -Client feedback forms -Staff feedback -Verbal reports to staff	Day to day	→	Action Plans (created by SBM) Big Picture Monitoring (by QA Co-ordinator)
-Direct observation -Paperwork Audit	Once a quarter		

Day-to-Day QA

- Course Director reports
- Client feedback forms
- Staff feedback
- Verbal reports to staff
- Report significant events to QA Co-ordinator

Quarterly QA

1. Identify one observation opportunity per quarter
2. Outline any required support to QA Co-ordinator
3. Identify, allocate and brief observers, clients (where necessary) and staff to be observed
4. Discuss Observer Report with observer
5. Evaluate technical aspects of Observer Report against observer's areas of expertise
6. Feedback Observer Report to member of staff observed (seek support from a senior member of staff)
7. Collate all paperwork from the activity and send to QA Co-ordinator
8. Develop an action plan as required
9. Report findings and actions to QA Co-ordinator

9.4.6. Company-wide QA Monitoring (“Big Picture Monitoring”)

The QA Co-ordintor is responsible for monitoring the quality assurance that is occurring throughout the company. This is achieved by a collation and evaluation of QA summaries produced by the SBMs. This process aims to identify and address any company-wide patterns that may be occurring, and also to ensure that quality assurance standards continually improve.

To this end, SBMs should send the following to the QA Co-ordinator:

- Day-to-Day QA
  1. significant positive or negative feedback
  2. action plans

- Quarterly
  1. a summary of the results of the quarterly observation visit
  2. a summary of the quarterly paperwork audit findings
  3. action plans

The QA Co-ordinator will hold an annual meeting with all SBMs and senior members of staff to discuss the findings of this big picture monitoring. Urgent matters may be raised at the weekly SBM meeting.

Please note, the QA Co-ordinator is also available to:

- provide any support the SBM may require in order to implement the QA policy
- do the quarterly paperwork audits

Observer Report

Observer		Member of Staff Observed	
Client		Course Director (if applicable)	
Programme		Date	

Notes:

- When considering the following elements, please do so from the point of view of all parties involved, e.g. Client, course director, trainer, member of staff.
- Please record observations only, not opinions. For example, “the students were bored” is an opinion, whereas “the students yawned frequently, three were playing on their mobile phones and one fell asleep” is an observation.

Client Care 1: Client liaison: written or verbal communication, marketing material *Is there any evidence that client communication issues have been successful or unsuccessful?*
Client Care 2: Programme Design *Is there any evidence that the programme does or does not suit the client's needs?*
Client Care 3: Personal Development Content (where applicable) *Is there any evidence that Personal Development content is or is not appropriate to the client?*
Client Care 4: Resources *Are all the resources required to deliver the programme in the right place, in the right condition, at the right time?*

Staff Skill 1: Emergency Procedures *Is there evidence that the member of staff would or would not be adequately equipped and knowledgeable to deal with an emergency?*
Staff Skill 2: Safety and Hazard Awareness *Is there evidence that the member of staff is or is not adequately assessing and managing hazards and risks?*
Staff Skill 3: Technical Skills *Is there any evidence that the member of staff does or does not have all the technical skills he/she requires to deliver the programme?*
Staff Skill 4: Delivery Skills *Is there any evidence that the member of staff does or does not have all the delivery/training skills he/she requires to deliver the programme?*
Staff Skill 5: Style and Ethos *Is there any evidence that the member of staff is or is not adequately conveying the style and ethos of the company?*

10. Equipment

Equipment failure can be fatal in the outdoor environment. Therefore it is essential that all equipment is fit for purpose. All equipment must be registered and recorded in stores.

Logging System

All equipment of a technical nature, ie climbing, water sports kit etc will be logged when purchased and receipts filed. All equipment purchased will be recognised for the activity and UIAA & CE stamped as appropriate. All equipment will be signed in and out of the store and inspected for damage on both occasions.

Wilderness Expertise equipment is some times supplemented form other sources. In these cases all equipment is checked and equipment records are reviewed.

Equipment Checks

All trainers must check the equipment when it is issued. In addition it is the responsibility of the activity trainer to check the equipment before and after the activities have taken place. Any equipment deemed unfit for use is to be marked and handed into the Course director or lead trainer onsite. It is then reported to the Resources manager who will refer it to the appropriate advisor for review.

On a monthly basis an inspection will be carried out on all technical equipment that has been used in the previous month. This will include all ropes logs. The checks will be performed by at least an SPSA/SPA qualified instructor.

Ropes will be retired after, signs of wear or tear or 2 years of use.

Karabiners / metal work will be retired after signs of wear or as manufactures recommend.

Annex. 1 Stakeholders

Stakeholders can be defined as:

- Participants
- Parents/guardians
- Teachers
- LEA's
- School – Senior Management Team
- Board of Governors

Annex. 2 Swimming Policy

Although significant risks exist with swimming we believe that all activities potentially have significant risks. Therefore we use one generic policy to ensure our activities are safe.

An activity risk assessment with site specific details is the foundation for ensuring activities are managed effectively. This must be completed for each activity. The process relies on a competent individual to conduct a risk assessment and provide adequate supervision. An activity specific competent individual is defined as an individual who holds relevant qualifications and experience.

Specifically looking at swimming this would include a review of experience and an appropriate qualification such as:

- Canoe Safety Test
- The Palm River Safety Initiative
- Royal Life Saving Society Awards
- Swimming Teachers Association
- Internal specific training course

For all activities the following process should be used to manage the specific risks. This includes swimming and wading.

- Confirm with Office that the activity is covered in the insurance;
- Complete a site-specific risk assessment. This should be conducted by an activity specific competent individual;
- Check participants are competent to undertake the activity e.g. for swimming - confirm that they can swim 50m (verbally and on parental consent)
- Put in place control measures to reduce key risks. e.g. for swimming this would include:
  - Boundaries
  - Buddy-Buddy system
  - Observer
  - Ratio's of 1 observer to 6 students
  - Rescue equipment (Throw line and Whistle)
  - Rescue competent activity supervisor
  - No diving, no night swimming, no swimming in currents & lightening
- Brief the team on the risks and control measures. This should include:
  - Approved entry and exit points
  - Local Hazards
  - Boundaries
  - Location of Observer
  - Buddy-buddy system
  - What to do if – in trouble / cramp / whistle blast
- Monitor and control the group

Annex. 3 Action Plan for Expedition Leaders with Students with Anaphylaxis

Our inclusive expeditions often have students with diverse needs and specific risks. Where possible we aim to treat everyone the same and provide a safe and enjoyable expedition. As an expedition leader your role is to implement the action plan below whilst not excluding students, raising undue publicity over an illness / condition and ensuring students are supported throughout.

1. Education and Awareness
Uk1, Uk2 and a Build up day discussion of Anaphylaxis is important. This should include the protocol in the MELP and the details outlined here.

Opportunities should be given for students to support these discussions. For example providing discussions on: food that commonly contains nuts / Signs and Symptoms of the anaphylactic reaction.

Prior to departure the Wilderness Expertise Support team will provide you with specific examples of food from your destination country which have been compiled from various sources who have experience of local food and allergies. This will include translations of specific foods.

In addition you should, during the acclimatisation period (days 1 - 3), repeat this session during an evening review. To further reinforce this additional discussions should take place when food is about to be purchased.

The training would include (see MELP for details):

a. what Epi Pens look like,
b. who carries one, who is trained to use them and where these people are to be found,
c. how fast it needs to be administered to save a life and;
d. potential side effects.

2. Food Purchase:
You and nominated group members will hold translations of ingredients for checking in restaurants and markets. For restaurant meals the Expedition Leader will order with students with severe allergic reactions to food. This will be conducted in a way to not draw attention to the issue.

For markets and group food purchases the leader will oversee the purchase of the food and once the food is assembled you will check the food to ensure no nuts have been purchased. The team will be involved in this but the responsibility for the final check will lie with the Expedition Leader.

Students with allergies should not to be forced into the Food Officer role or part of the food purchasing team unless they wish to be. All students should be treated equally where possible and like any expedition team member may join the team purchasing food but this is not the key control measure. As outlined above the expedition Leader will check the food post purchase.

3. Group Management:
Students with Allergic reactions need to have fast access to treatment. To this end the Expedition Leader must ensure that a trained adult with an Epi pen is accessible to students predisposed to allergic reactions at all times in the case of an allergic reaction.

To ensure that this does not preclude them from having a comparative experience the Teacher and Leader are should be trained in the use of Epi Pens. They will each carry one with a third being carried by those predisposed to a reaction.

Annex. 4 Missing Persons Procedure

The best preventative measure for avoiding a lost person on an expedition is through the training a team will undertake. During the UK 2 training weekend, the Expedition Leader will run through a live scenario and discuss the outcomes with the team to highlight the dangers of individuals being lost.

Each team will discuss an Expedition Code, which will include a rule that no one individual is to wander off on their own.

While on Expedition, if deemed appropriate by the Expedition Leader, if teams break down into smaller groups, which will be no less than 4 in a group, a sub group leader will be appointed to ensure no one gets lost.

In such cases like these, a lost person action plan will be discussed as a group, so that should anyone get lost, they know what course of action to take. Expedition leaders will ensure in such situations, each participant and adult is carrying the address and telephone number of the hostel in which they are staying in both English and the local language. Individuals are instructed NOT to phone their parents but to phone the hostel and stay put.

As soon as a person is reported missing, the leader will put their back up plan into action, which will include returning to the hostel to collect any messages and calling the Ops Room in the UK.