

BS 8848:2014



BSI Standards Publication

Specification for the provision of visits, fieldwork, expeditions and adventurous activities outside the United Kingdom

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Foreword

Publishing information

This British Standard is published by BSI Standards Limited, under licence from The British Standards Institution, and came into effect on 31 March 2014. It was prepared by Technical Committee SVS/2, *Tourism services*. A list of organizations represented on this committee can be obtained on request to its secretary.

Supersession

This British Standard supersedes BS 8848:2007, which is withdrawn.

Information about this document

This is a full revision of the standard, and introduces the following principal changes:

- a) clauses have been regrouped and consolidated to focus on key processes such as planning and risk assessment;
- b) a focus on the approval and review of safety management systems, including matching risk exposure to the stated aims of the venture and risk management during the venture;
- c) increased information for the participant and on the participant's responsibilities in safety management, given in the new 5.6 on informed consent and an updated Annex B;
- d) an increased applicability of the standard for individual placements and lone workers by the introduction of the new 5.1.5 and by providing a new definition of "remote supervision" (see 2.17.3);
- e) the introduction of the definition of "subject matter expert" (formerly "technical advisor") and the inclusion of competence assessment criteria for venture activity specialists where participants are under 18 years old and unaccompanied by their parent or legal guardian;
- f) revisions to the clauses on venture continuity and supervision have resulted in the definitions of "down time" and "personal time" being redundant;
- g) streamlining of the clause on claims of conformity has resulted in the removal of partial conformity and the descriptions of the types of conformity testing, which are now covered informatively in Annex A.

The websites referred to in this British Standard were last viewed on 26 March 2014.

Use of this document

It has been assumed in the preparation of this British Standard that the execution of its provisions will be entrusted to appropriately qualified and experienced people, for whose use it has been produced.

Presentational conventions

The provisions of this standard are presented in roman (i.e. upright) type. Its requirements are expressed in sentences in which the principal auxiliary verb is "shall". The user needs to satisfy all the requirements in order to be able to claim compliance with the standard.

Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.

Contractual and legal considerations

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

Compliance with a British Standard cannot confer immunity from legal obligations.

Introduction

0.1 General

BS 8848 provides a specification for organizing and managing visits, fieldwork, expeditions and adventurous activities outside the United Kingdom. BS 8848 reflects good practice for the provision of an overseas venture, and can also be used for any element of the venture that takes place in the UK, for example, pre-venture training.

The aim is to set out in clear, unambiguous language the actions and associated responsibilities essential to the provision of a venture.

BS 8848 has as an underlying principle that the organization claiming conformity with the standard for a venture is accountable for all elements of that venture. This includes any elements contracted to a third party provider, such as accommodation and travel.

BS 8848 sets out what is required if the standard is to be met. It does not explain how to conform to the standard and, as such, does not issue guidance. It leaves guidance to organizations in the private or voluntary sector and to public sector employers such as local authorities.

BS 8848 specifies operational requirements for providers of a broad range of ventures, including:

- voluntary, educational and charitable sectors of provision, as well as commercial providers of ventures;
- university and academic fieldwork, gap year and volunteering experiences, school visits, charity challenges and research expeditions;
- adventure holidays and treks;
- those organized for young people and mature adults, whether in groups or venturing as individuals.

BS 8848 can be used to help venture providers develop internal procedures and processes, benchmark existing practices, and as a checklist to verify a venture's readiness.

0.2 Applicability of the standard

This British Standard can be applied by any organization, group or individual seeking to verify that a venture is planned and organized to achieve its purpose, and has a safety management system in place that is proportionate to the level of risk likely to be present in the venture and to the capabilities and experience of the participants and the leadership team.

Examples of venture providers, ventures, participants and environments to which this standard is applicable are shown in Table 1. This list should not be regarded as exhaustive. No types of venture taking place overseas are likely to be excluded from the standard

0.3 Fundamental principles

The underlying principle of this standard is that the organization (i.e. the venture provider) is accountable for all aspects, including safety, of a venture provided either on a voluntary basis or in return for payment. Responsibility for providing constituent elements can be delegated or outsourced but accountability for ensuring conformity with this standard remains with the venture provider. Additional guidance on the use of BS 8848 by venture providers is given in Annex A.

Table 1 Examples of applicability of the standard

Venture providers • Educational establishments in the further and higher sectors • Schools and youth education sector • Commercial organizations • Sole traders • Voluntary and charity organizations • Youth organizations • Local education departments and other school employers • Travel providers and tour operators	Ventures • Adventurous activities • Fieldwork • Expeditions • Charity challenges • Educational visits • Placements (e.g. by universities or organizations) • Volunteer placements • Cultural exchanges • Gap year activities
Participants in a venture • Groups • Individuals • Students • Children • Adults • Vulnerable adults	Types of environment • Temperate • Tropical • Mountain and high altitude • Polar • Aquatic (including marine) • Desert • Underground • Urban • Rural • Remote regions

For operational management to be effective it is important that the venture provider identifies the competencies of the leaders and participants needed to manage the risks and deliver the venture safely while meeting its purpose. It follows that the venture provider recruits people with relevant experience and/or qualifications to create a competent leadership team.

The standard is based on suitable, sufficient and proportional risk assessment. Focusing on risk management enables the standard to be applied to a range of activities, environments and groups, as well as informing the ongoing dynamic risk management.

A significant aspect of the standard in relation to participants and stakeholders is that of “informed consent”. The venture provider should ensure that participants are enabled to choose what risks they are prepared to accept and inform participants of the risks present in a venture and what is to be done to manage them. Consent is not a one-way process and, in return, the venture provider should expect participants to commit to “reasonable behaviour” as a contribution to keeping themselves and others safe. Additional guidance on the use of this standard from a participant’s perspective is given in Annex B.

1 Scope

This British Standard specifies requirements for the provision of visits, fieldwork, expeditions and adventurous activities undertaken for educational, research, training or recreational purposes outside the United Kingdom.

It applies to ventures:

- a) where the hazards are such that, without consideration by competent people, the level of risk would be significant;
- b) at any location, including challenging terrain, remote regions, climatic extremes or where unfamiliar cultural experiences or health hazards can be expected;
- c) organized for groups or individuals;
- d) planned, managed and evaluated by organizations, including commercial companies, educational establishments, voluntary or charitable organizations and independent groups or individuals.

2 Terms and definitions

For the purposes of this British Standard, the following definitions apply.

2.1 adventurous activity

activity that involves an inherent or deliberate element of risk, challenge or adventure and requires specialist skills for its safe delivery

2.2 competent person

person who has the combination of training, skills, experience and knowledge and ability to apply them to perform a task safely and effectively

2.3 dynamic risk assessment

assessment of newly identified and changes in previously identified risks throughout the venture, and the modification of management arrangements accordingly

NOTE The dynamic risk assessment is not generally written down.

2.4 emergency

serious situation requiring immediate action

2.5 home representative

venture provider's point of contact in the home country of the provider

2.6 in-country representative

individual or organization that acts in support of the venture provider in the country where the venture is taking place

2.7 incident

unplanned occurrence, including accidents, with the potential to cause harm or a significant change of plan

2.8 individual placement

venture where a participant is unaccompanied and, by arrangement with the venture provider, undertakes the role of venture leader and participant in combination

NOTE Can also be known as a "lone worker".

2.9 leader

member of the leadership team, reporting to the venture leader, and to whom responsibility for a particular group of participants and/or activity may be assigned

NOTE A leader could also be a venture activity specialist (see 2.22).

2.10 leadership team

team that includes the venture leader, any other leaders and venture activity specialists, approved by the venture provider to deliver the venture

NOTE It is recognized that many ventures may be run by the venture leader only, in which case there would be a leadership team consisting of one person, with the venture leader fulfilling the requirements of both the leader and leadership team.

2.11 level of difficulty

indication of the physical, psychological and emotional difficulty expected to be encountered whilst participating in a venture, based on factors such as technical ability required, terrain, altitude or climate

2.12 participant

person taking part in the venture but not a member of the leadership team

2.13 remote region

place where access is difficult

NOTE The factors to be considered when trying to establish if a place is remote include communication, medical issues, rescue availability, accessibility, environmental hazards and time to access assistance.

2.14 risk assessment and management system

system by which all aspects of the venture are assessed and managed with the aim of ensuring the safety and well-being of all on the venture or others who could be adversely affected by the venture

2.15 stakeholder

person or organization with a direct interest in the venture as defined by the venture provider

NOTE See 5.3 for further information on stakeholders.

2.16 subject matter expert

person having a higher level of practical experience and competence than required for the activity alone (see also 2.22), which might include a good knowledge of comparable locations, access to, or knowledge of, the venture leader to be deployed, and personal qualities to make informed judgments

2.17 supervision**2.17.1 direct supervision**

where a nominated person responsible for managing participants during all or part of the venture is able to intervene immediately

NOTE 1 The term “immediately” is situation-specific, where there is an ability to intervene and directly influence the outcome of a participant’s actions, but in all cases would assume collocation.

NOTE 2 Normally a member of the leadership team, except in the case of an individual placement when it would be someone from a third party such as a host organization.

2.17.2 indirect supervision

where a nominated person responsible for managing participants during all or part of the venture is in the vicinity but unable to intervene immediately

NOTE 1 Normally a member of the leadership team, except in the case of an individual placement when it would be someone from a third party such as a host organization.

NOTE 2 The indirect supervisor would be based in the vicinity of the venture and, while not available immediately, could respond in person promptly.

2.17.3 remote supervision

where a nominated person is responsible for managing participants throughout their venture, but is not involved on a day-to-day basis and is unlikely to be in the vicinity, and would therefore take time to respond

NOTE For individual placements the remote supervisor might be the in-country representative or the home representative.

2.18 support team

people providing ancillary services to the venture provider, and who are not participants or members of the leadership team

2.19 third party provider

provider of one or more contracted services to the venture provider

2.20 venture

undertaking involving travel to a location away from a participant's usual area of residence and experience, comprising one or more activities taking place over one or more days to meet a pre-defined purpose

2.21 venture activity

element of a venture included to contribute to the achievement of the pre-defined purpose of the venture

2.22 venture activity specialist

individual having expertise in a particular activity, who may be employed by a third party provider, taking part in the venture and contributing, within their competence regarding that designated activity, to decisions taken by the leadership team

2.23 venture leader

individual taking responsibility for all of the venture under the direction of the venture provider

2.24 venture provider

individual or organization having overall accountability for all aspects, including safety, of the venture provided either on a voluntary basis or in return for payment

2.25 vulnerable adult

person who is aged 18 or over, who is or might be:

- in need of community services due to age, illness or a mental or physical disability; and
- unable to take care of themselves or protect themselves against significant harm or exploitation

3 The venture

3.1 The venture provider

Each venture shall have one venture provider who shall be accountable for all elements of the venture.

3.2 Purpose for the venture

The venture provider shall:

- a) ensure that the purpose, aim and objectives of the venture are clearly defined;
- b) ensure that all venture activities are identified and support the overall purpose of the venture;
- c) in advance of the venture, agree the aim and objectives with, or communicate them to, the leadership team, potential participants and any stakeholders (as identified in accordance with 5.3);
- d) in the pre-venture literature, present the nature of the venture activities, the amenities and the facilities to be used during the venture in a clear, accurate and accessible format to the leadership team and all participants (and other stakeholders on request).

3.3 Planning the venture

3.3.1 Planning shall be carried out by the venture provider to ensure compatibility with the purpose of the venture, the abilities of the leadership team and participants, and the activities that are to be undertaken during the venture.

3.3.2 The locations to be visited shall be researched to ensure compatibility with the purpose of the venture, the abilities of the leadership team and participants, and the activities that are to be undertaken during the venture.

NOTE A reconnaissance of the location, the venture activities and the third party providers should be performed where practicable.

3.3.3 A venture itinerary, overall timetable and budget for the venture shall be prepared, monitored and maintained by the venture provider.

3.3.4 The venture provider shall evaluate the environmental and cultural impacts of the venture and, if necessary, take steps to mitigate these impacts where practicable.

3.3.5 Plans for travel and accommodation shall be prepared in accordance with 6.3 and 6.4.

3.3.6 A risk assessment and management system shall be initiated by the venture provider in accordance with Clause 4 to clarify the associated risks and benefits.

3.4 Permissions

3.4.1 The venture provider shall identify the permissions needed for the venture and shall ensure that they have been obtained.

NOTE Permissions that might need to be obtained include those for travel (such as passports, visas, local permits and medical certificates); informed consent from parents, legal guardians or employers; and performing venture activities (such as collection and removal of specimens).

3.4.2 Where the venture impacts on a host community, prior and continued informed consent of the local community shall be established.

3.5 Finance

3.5.1 The venture provider shall supply all participants with a summary statement of the costs of the venture and an estimate of any additional charges that are likely to be incurred.

3.5.2 The venture provider shall ensure that:

- a) a budget is prepared for the venture;
- b) funds sufficient for the venture are available and accessible in the field;
- c) procedures are established for the management of finances during the venture, including contingencies and emergencies.

3.6 Venture continuity

3.6.1 The venture provider shall assess the continuity of the plan for the venture to confirm that the entire period between venture commencement and venture completion is provided for.

3.6.2 Where the venture provider allows time outside its jurisdiction, it shall include a statement to that effect in the pre-booking information and the contract. The statement shall include reference to the importance of the participant making adequate insurance provision for any time outside the jurisdiction of the venture provider.

NOTE In the absence of such a statement, time outside the jurisdiction of the venture provider is neither included nor permitted and the venture provider accepts responsibility for the venture throughout its entire duration.

3.6.3 For periods of time outside the jurisdiction of the venture provider, the start and finish times shall remain the venture provider's responsibility and shall be managed and monitored in accordance with predetermined procedures established prior to the venture.

3.6.4 The inclusion of time outside the jurisdiction of the venture provider and the management of its start and finish shall be a specific element of risk assessment undertaken in conformity with the written risk assessment (4.3.2) and risk management during the venture (4.4).

3.7 Contingency, incident and emergency planning

3.7.1 Contingency planning

3.7.1.1 The venture provider shall prepare a contingency plan that indicates what actions are to be taken if, for whatever reason, the proposed venture itinerary or plans need to be altered during the venture.

3.7.1.2 Risks identified in the risk assessment process shall be used to determine the level of contingency planning.

3.7.1.3 The contingency planning shall include provision for when any participant or member of the leadership team does not reach, or maintain, the required level of competence.

NOTE Contingency plans are likely to include responses to:

- a) illness or injury to a participant or a member of the leadership team, or their next of kin;
- b) change to the participant to leadership team ratio;
- c) change of route or activities;
- d) change in social or political stability;

- e) *extreme natural events (including deteriorating weather);*
- f) *transport delay, breakdown or transport identified as unacceptable by safety assessment;*
- g) *theft or loss of money/need for additional funds;*
- h) *damage to or loss of critical equipment or clothing.*

3.7.1.4 Any contingency plan shall be issued to the leadership team.

3.7.2 Incident and emergency response

3.7.2.1 Contingency planning shall include a documented incident and emergency response plan that includes daytime and night-time provisions for:

- a) the division of responsibilities between the venture provider and the venture leader;
- b) the procedures which are to be implemented in response to an incident or emergency, including resolution by those on the venture and/or using external agencies;
- c) emergency communications in accordance with 3.8.3;
- d) financial provision for responding to incidents and emergency;
- e) response to medical incidents/emergencies, including:
 - 1) options for medical services and support available at all stages of the venture;
 - 2) contact details for medical services and support at all stages of the venture;
 - 3) actions for specific medical needs of any member of the venture;
- f) repatriation or evacuation procedures;
- g) response to civil unrest and natural disasters;
- h) missing person procedures;
- i) the support which is to be provided to stakeholders and how that is to be provided;
- j) media management;
- k) participants' passport details.

3.7.2.2 The venture provider and the venture leader shall have access to information to implement an incident or emergency response.

3.7.2.3 The venture provider shall instruct the leadership team and in-country representative of their roles, responsibilities and actions with regard to the implementation of the incident and emergency response plan.

3.7.2.4 The venture provider shall indicate in pre-contractual information that all members of the venture, and other stakeholders on request, shall be provided prior to departure with a summary of the incident and emergency response plan. Where the participant is under 18 years of age or a vulnerable adult, this information shall also be provided to the participant's parent or legal guardian.

3.7.2.5 The venture provider shall ensure that the stakeholders are briefed about their roles and responsibilities, if any, within the incident and emergency response plan.

3.8 Communication

3.8.1 General

3.8.1.1 The venture provider shall ensure that a communication plan is established prior to the venture.

3.8.1.2 The communication plan shall include:

- a) routine communications conforming to **3.8.2**;
- b) emergency communications conforming to **3.8.3**;
- c) when the venture leader, in-country representative, or participant on an individual placement is expected to contact the home representative.

NOTE The communication plan might include agreed times for contact and a procedure for when contact is not achieved.

3.8.1.3 Prior to the start of the venture, the venture provider shall inform the leadership team and participants as to what communication options are available to them and their next of kin during the venture.

3.8.2 Routine communications

The venture provider shall ensure that there is the capability to initiate two-way communication between those on the venture and the venture provider, by either party, to an agreed schedule.

3.8.3 Emergency communications

3.8.3.1 The venture provider shall ensure that a method of communicating between those on the venture and the venture provider, in the event of an emergency, is established pre-venture.

NOTE In the case of remote ventures, availability of a secondary back-up method of communicating is recommended, in case the primary method becomes unusable.

3.8.3.2 The chosen methods of communication shall be checked as available and effective.

3.8.3.3 The venture provider shall provide the leadership team with a list of emergency contact numbers, relevant to the venture, for the:

- a) venture provider;
- b) leadership team;
- c) a local in-country representative;
- d) diplomatic missions (e.g. embassy or consuls) for all nationalities in the team;
- e) emergency services;
- f) airlines (national and international) and/or other transport providers;
- g) emergency medical repatriation services and insurance companies;
- h) nominated emergency contacts for the participants and leadership team.

3.8.3.4 In the event of the venture provider needing to contact a participant or member of the leadership team about an emergency external to the venture, the venture provider shall be able to contact those on the venture within an agreed time frame.

NOTE This may be via scheduled call-ins and/or via an in-country representative.