

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This British Standard supersedes BS 8848:2007, which is withdrawn.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

<p><b>Venture providers</b></p> <ul style="list-style-type: none"> <li>• Educational establishments in the further and higher sectors</li> <li>• Schools and youth education sector</li> <li>• Commercial organizations</li> <li>• Sole traders</li> <li>• Voluntary and charity organizations</li> <li>• Youth organizations</li> <li>• Local education departments and other school employers</li> <li>• Travel providers and tour operators</li> </ul>	<p><b>Ventures</b></p> <ul style="list-style-type: none"> <li>• Adventurous activities</li> <li>• Fieldwork</li> <li>• Expeditions</li> <li>• Charity challenges</li> <li>• Educational visits</li> <li>• Placements (e.g. by universities or organizations)</li> <li>• Volunteer placements</li> <li>• Cultural exchanges</li> <li>• Gap year activities</li> </ul>
<p><b>Participants in a venture</b></p> <ul style="list-style-type: none"> <li>• Groups</li> <li>• Individuals</li> <li>• Students</li> <li>• Children</li> <li>• Adults</li> <li>• Vulnerable adults</li> </ul>	<p><b>Types of environment</b></p> <ul style="list-style-type: none"> <li>• Temperate</li> <li>• Tropical</li> <li>• Mountain and high altitude</li> <li>• Polar</li> <li>• Aquatic (including marine)</li> <li>• Desert</li> <li>• Underground</li> <li>• Urban</li> <li>• Rural</li> <li>• Remote regions</li> </ul>

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.

3.8.3.5 The venture provider shall ensure that more than one member of the venture is capable of operating the communication equipment being used.

### 3.8.4 Communication between the leadership team, participants and local staff

The venture provider shall ensure that in the event of an incident, the capability exists to communicate between the leadership team, participants, local staff and local authorities.

## 3.9 Insurance

### 3.9.1 General

3.9.1.1 The venture provider shall identify what insurance cover is in place for the venture and any aspects of the venture that are not covered. This information shall be provided to participants and the leadership team (and stakeholders when requested).

*NOTE* The venture provider should seek professional advice from an insurance broker on the type and level of insurance cover needed for the venture.

3.9.1.2 Where a participant or a member of the leadership team obtains their own insurance, the venture provider shall request details of their insurance cover to enable implementation of the planned emergency response.

*NOTE* If the risks to be managed dictate, the venture provider might have to exclude someone from participating if they do not have the necessary insurance cover for the venture.

### 3.9.2 Public liability

The venture provider shall have public liability insurance for all aspects of the venture and ensure that it is in place for all participants and members of the leadership team and the support team.

### 3.9.3 Third party insurance

Where the venture provider uses a third party provider, the venture provider shall ensure that the third party service is covered by insurance. This information shall be provided to participants (and stakeholders when requested).

*NOTE* Attention is drawn to the availability of Tour Operators' Liability Insurance and similar policies and the requirements relating to third party providers in 6.2.

### 3.9.4 Medical, evacuation and repatriation insurance

Where the venture provider covers the medical insurance for the leadership team or a participant, this information shall be provided to those individuals to whom the insurance applies (and stakeholders when requested) and the medical insurance shall include:

- a) emergency assistance and repatriation, including, where possible, air ambulance and air transport costs;
- b) emergency dental treatment; and
- c) travel and accommodation expenses for a minimum of one person who has to travel to, remain with or escort an incapacitated insured participant.

*NOTE* Where an individual has their own medical insurance arrangements, it is in their interest to make sure the venture provider has all the details. Further, if the risks to be managed dictate, a venture provider might have to forbid someone from participating if they do not pass the necessary information to them before departure.



## 4 Risk management

### 4.1 Safety policy

The venture provider shall ensure that all parts of the venture are covered by a written policy relating to safety and health that includes:

- a) an overview of the organization's approach to risk management;
- b) an inclusion and accessibility statement;
- c) a protection statement for under 18 year olds and vulnerable adults, if any participants are in these categories;
- d) a code of conduct for all those on the venture and the disciplinary action that will be taken if the code is broken.

### 4.2 Risk assessment and management system

**4.2.1** The safety policy shall be implemented using a documented risk assessment and management system. This system shall focus on planning the venture to ensure that the risk exposure is consistent with the stated objectives of the venture.

**4.2.2** The risk assessment and management system shall address the planning, organizing, managing, monitoring and reviewing of the venture, including:

- a) identification of the required competencies of the leadership team and capability of participants;
- b) planning and communication of the risk exposures and their management;
- c) the implementation of risk management throughout the venture.

**4.2.3** The venture provider shall ensure that threat and risk assessments are compiled and maintained for all parts of the venture by competent persons both before and throughout the venture.

**4.2.4** The venture provider shall have a process in place to manage the risks identified throughout the venture consistent with the stated purpose of the venture.

**4.2.5** If a risk identified during the planning process cannot be mitigated to a level acceptable to the venture provider, the venture provider shall have a process in place to eliminate exposure to that risk.

*NOTE This may include altering a venture itinerary.*

**4.2.6** A governance process shall be implemented whereby the directors of the venture provider (or their equivalent) ensure that the threat and risk assessment of each venture is approved either by them or by their delegated competent person, before commencement of the venture.

**4.2.7** Prior to contractual commitment the venture provider shall inform all participants and members of the leadership team of the outcomes of the threat and risk assessment (and stakeholders when requested).

**4.2.8** The risks specifically associated with transport, accommodation, venture activities and non-activity time shall be explicitly communicated to participants if they are outside of the participants' normal experience, pose specific risks or require special skills.

*NOTE This might take the form of a risk summary.*

## 4.3 Risk management in the venture planning

### 4.3.1 Threat assessment

The venture provider shall ensure that a threat assessment of the geopolitical risks en route to and in the proposed destination country is undertaken and maintained, including as a minimum the following elements:

- a) consideration of security, political and health threats and natural hazards;
- b) consideration of the Foreign and Commonwealth Office travel advice;
- c) identification of the measures to be taken to reduce or manage the threats identified;
- d) identification of the method used to maintain the threat assessment during the planning and provision of the venture;
- e) identification of the principal sources, author, date compiled and date of any updates.

### 4.3.2 Written risk assessment

The venture provider shall assess the health, safety, environmental and cultural risks associated with the proposed venture, including provision by third parties. The venture provider shall keep and maintain a written record of the main findings.

This risk assessment shall, as a minimum, include the following elements:

- a) competence of the participants and leadership team;
- b) outcomes of the threat assessment;
- c) analysis of health, safety, environmental and cultural risks;
- d) potential risks:
  - 1) to those on the venture;
  - 2) caused by those on the venture to others;
  - 3) caused by the venture to others;

*NOTE If unsupervised contact with under-18-year-old local individuals or vulnerable adults is included in the venture, the risks and their management should be included in the risk assessment.*

- e) identification of the management measures, including:
  - 1) the methods of supervision and staffing ratios;
  - 2) whether male and female leaders are to be included on mixed gender participant ventures;
  - 3) the arrangements for the start and finish times of any period that is outside the jurisdiction of the venture provider;
- f) the method used to ensure that safety management measures are effectively communicated, implemented, monitored and reviewed;
- g) identification of the principal reference sources, author, date compiled and date of any updates.

#### 4.4 Risk management during a venture

The venture provider shall ensure that the leadership team in the field is competent and able to:

- a) conduct dynamic risk assessments throughout the venture, including of transport and accommodation;
- b) communicate the required actions arising from the dynamic risk assessment to the leadership team, participants and others on the venture;
- c) prior to using the services of any third party provider, complete an appraisal of the third party provider's services in accordance with 6.2 and confirm the third party provider's duties and responsibilities;
- d) implement plans for contingencies as part of the risk management system.

#### 4.5 The participants' role in risk management

The venture provider shall make the participants aware of the following, and the requirement to be actively engaged in:

- a) taking reasonable care of themselves and others, including actions required of them arising from risk assessment;
- b) following instructions from the leadership team;
- c) bringing concerns about their own safety, health and well-being and those of others to the attention of the leadership team or supervisors;
- d) complying with the code of conduct [see 4.1d)].

*NOTE The Health and Safety Executive provides advice, information and guidance on equivalent risk management in the UK. See [www.hse.gov.uk](http://www.hse.gov.uk) for further details.*

## 5 People

### 5.1 Venture leader, leadership team and support personnel

#### 5.1.1 General

**5.1.1.1** The venture leader, leadership team and support personnel (if any) shall be selected so that they possess personal qualities, experience and communication skills relevant to the profile of the participants and the venture. This shall consider both non-technical and any technical elements of the venture.

**5.1.1.2** The venture provider shall have a written statement that details the minimum competencies required of the leadership team for:

- a) the activities for which the leadership team are responsible;
- b) the environment in which the venture takes place;
- c) the needs and abilities of the participants;
- d) the supervision and management of individuals and groups.

**5.1.1.3** The venture provider shall gather evidence that members of the leadership team are competent in accordance with the written statement (see 5.1.1.2). This evidence shall be documented.

**5.1.1.4** Evidence of competence shall be identified through one or a combination of the following:

- a) experience of ventures of a similar nature;
- b) in-house training and assessment;
- c) a relevant and current national or international qualification or award.

**5.1.1.5** The venture leader, leadership team and support personnel (if any) shall be assigned to duties within their proven area of competence, as defined by the venture provider.

## **5.1.2 Venture leader**

**5.1.2.1** There shall be one venture leader per venture.

**5.1.2.2** The venture provider shall select a competent person as the venture leader in accordance with **5.1.1.1**.

**5.1.2.3** The venture provider shall have a procedure for ensuring the venture leader is informed of the skills and experience of the leadership team and the composition, known needs and experience of each participant in accordance with **5.2**.

## **5.1.3 Leadership team**

**5.1.3.1** The venture provider shall:

- a) identify a substitute venture leader who is available to take full control in the event that the venture leader is unable to fulfil their function; or
- b) inform participants (and stakeholders when requested) that, in the event that the venture leader is unable to fulfil their function, the venture shall be restructured or curtailed; or
- c) establish a combination of both a) and b).

**5.1.3.2** For mixed gender ventures, the venture provider shall consider as part of the written risk assessment the inclusion of both males and females in the leadership team.

**5.1.3.3** For ventures where participants are under 18 years of age, or are vulnerable adults, the venture provider shall select the leadership team in accordance with **5.1.4** and **5.2.3**.

**5.1.3.4** The venture provider shall obtain written confirmation that the members of the leadership team agree to comply with the relevant venture provider's policies on safety and health, inclusion and accessibility, child protection (if relevant) and code of conduct [see **4.1d**].

**5.1.3.5** The venture provider shall provide the leadership team with details of the venture provider's insurance policies. This shall include details of any employer's liability insurance, public liability insurance and medical insurance.

*NOTE Further requirements for insurance are specified in 3.9.*

## **5.1.4 Venture activity specialist working with under 18s**

**5.1.4.1** Where participants are:

- a) under 18 years old; and
  - b) not accompanied by their parent or legal guardian,
- the provisions of **5.1.4.2**, **5.1.4.3** and **5.1.4.4** shall apply.

**5.1.4.2** Evidence of competence of the venture activity specialist(s) shall be identified through one or a combination of the following:

- a) experience of ventures of a similar nature, endorsed by a statement of competence from a subject matter expert;
- b) in-house training and assessment by a subject matter expert;
- c) a relevant and current UK national or local equivalent, or international, qualification or award.

**5.1.4.3** Subject matter experts consulted in accordance with 5.1.4.2a) and b) shall have the experience and qualifications equivalent to assessors of the relevant UK NGB award (if existing) or the local in-country equivalent award.

**5.1.4.4** A statement of individual competence (see 5.1.4.2) shall be in the form of a written statement giving the:

- a) name of the person to whom it applies;
- b) scope of the statement;
- c) name, experience and qualifications of the person making the statement;
- d) criteria used to determine competence;
- e) date and content of any assessment.

### **5.1.5 Individual placements and lone workers**

An individual placement or lone worker acting as both a participant and venture leader, as a minimum, shall be supported via remote supervision (5.4.4).

*NOTE* Participants taking an individual placement assume additional responsibilities as they take on the role of venture leader (2.9) and participant (2.12) in combination. Individual placements and their venture provider need to establish a mutual understanding of what this arrangement entails.

### **5.1.6 Support personnel**

#### **5.1.6.1 In-country representative**

The venture provider shall identify an in-country representative to support the response to an incident or emergency.

*NOTE* In-country support may be via the British Embassy or British consular representative.

#### **5.1.6.2 Home representative**

The venture provider shall ensure that the home representative is competent in areas relating to:

- a) their on-call role;
- b) incident and emergency response.

#### **5.1.6.3 Subject matter experts**

The venture provider shall ensure that subject matter experts are accessible to the leadership team to provide advice and support within their specific competencies.

## 5.2 Identification of potential participants

### 5.2.1 Selection of potential participants

The venture provider shall establish the criteria to be applied for inclusion of participants in relation to the purpose, demands and anticipated level of difficulty of the venture.

The venture provider shall communicate to stakeholders the criteria for inclusion of participants.

*NOTE* Criteria for consideration might include fitness, attitude, team working ability, mobility, behaviour, psychological needs, pre-existing medical conditions, dietary requirements and cultural or religious requirements.

### 5.2.2 Information about potential participants

**5.2.2.1** For each potential participant, the venture provider shall obtain their:

- a) name;
- b) date of birth;
- c) gender;
- d) nationality.

**5.2.2.2** For each potential participant, the venture provider shall request information in relation to the nature of the venture with regard to:

- a) capability to partake in the venture activities based on the anticipated level of difficulty;
- b) previous venture experience (if any);
- c) disabilities, behavioural or other special needs.

**5.2.2.3** The venture provider shall warn participants that failure to declare information requested in 5.2.2.2 might jeopardize the individual's ability to participate, and possibly the viability of the venture itself.

### 5.2.3 Protection of a participant under 18 years of age or a vulnerable adult

The venture provider shall ensure that members of the leadership team who have unsupervised contact with participants have been checked for their suitability to work with participants under 18 years of age and vulnerable adults.

*NOTE 1* Suitability should be determined by:

- a) interview;
- b) checking references;
- c) checking employment records; and/or
- d) self-declaration.

*NOTE 2* The Disclosure and Barring Service can be used to help providers make informed recruitment decisions on current vetting and barring procedures in the UK, but does not replace the assessment of suitability.

### 5.3 Stakeholders

As a minimum the venture provider shall include the following as stakeholders:

- a) where a participant is under 18 years of age or a vulnerable adult, the venture provider shall identify a parent or legal guardian as a stakeholder;
- b) where a participant is a member of an organization (e.g. educational, volunteer or charitable body) associated with the venture but not taking the venture provider role, the venture provider shall identify that organization as a stakeholder and identify who is the responsible person in that organization.

*NOTE* Venture providers are advised to maintain a record of those who they consider to be stakeholders in the venture.

### 5.4 Supervision and staffing ratios

#### 5.4.1 General

**5.4.1.1** The venture provider shall designate a venture leader who has the task of overall supervision.

**5.4.1.2** The venture provider shall implement the type of supervision identified in the risk assessment (4.3.2).

**5.4.1.3** Where supervision is to be:

- a) direct, it shall conform to 5.4.2;
- b) indirect, it shall conform to 5.4.3;
- c) remote, it shall conform to 5.4.4.

*NOTE* The decision as to whether supervision is direct, indirect or remote depends on the maturity, experience and competence of the participants, and their knowledge of the locations and ability to undertake the venture activities.

**5.4.1.4** Where indirect or remote supervision is to be provided, the venture provider shall establish arrangements for its management, including disciplinary action in the event that those arrangements are not met. Details of the arrangements and sanctions shall be communicated to the participants and the leadership team (and stakeholders on request) before the venture.

**5.4.1.5** The factors to be taken into account when deciding on the composition of the leadership team and the ratio of the number of leaders to participants shall include the:

- a) nature of the venture and its activities and location;
- b) experience of the group involved and the needs of the individuals within the group;
- c) environment and conditions in which the venture takes place;
- d) experience of the leadership team;
- e) requirements of external agencies affecting the venture.

*NOTE* Requirements of external agencies might include, for example, those of local authorities in the case of schools, NGBs or national requirements of the host country relating to guiding qualifications.

**5.4.1.6** The venture provider shall inform the venture leader that it is the venture leader's responsibility to:

- a) allocate specific supervisory duties;
- b) allocate a competent leader to each sub-group, where groups are subdivided, during the venture.

**5.4.1.7** The venture provider shall inform the venture leader and the leader of any sub-groups that it is the leaders' responsibility to know the number and identities of the participants they are responsible for supervising.

## **5.4.2 Direct supervision**

**5.4.2.1** When the need for direct supervision has been identified in accordance with **4.3.2**, the venture provider shall ensure that a nominated member of the leadership team is present at all times.

*NOTE Direct supervision is usually appropriate for less experienced groups, group members with special educational or behavioural needs, or when undertaking particularly hazardous activities.*

**5.4.2.2** The venture provider shall instruct the nominated member of the leadership team, as a minimum, to:

- a) know where all participants are at all times;
- b) comply with the risk management measures;
- c) monitor and respond to behavioural changes in the group/individuals;
- d) stop an activity for an individual or the team if it is deemed to be too hazardous.

## **5.4.3 Indirect supervision**

**5.4.3.1** Where indirect supervision has been identified in accordance with **4.3.2**, the venture provider shall be satisfied that the participants have the necessary competence for the venture to be supervised indirectly.

**5.4.3.2** Full details of responsibilities and how indirect supervision functions shall be provided to participants (and other stakeholders on request) before the venture starts. Where a 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.

**5.4.3.3** When supervision is indirect, the venture provider shall ensure that:

- a) participants are sufficiently trained and assessed as competent for the level of activity to be undertaken, including safe conduct and emergency procedures;
- b) clear and understandable boundaries are set for all members of the venture;
- c) there are clear lines of communication between the participants and the leadership team;
- d) a member of the leadership team monitors the progress of each of the participants;
- e) there is a recognized point at which the activity is completed;
- f) when the activity cannot be completed safely, there are clear arrangements to adjust the level of supervision or adjust or terminate the activity.

**5.4.3.4** The venture provider shall ensure that the venture leader has the competence and resources to intervene in a manner determined by the safety management system in accordance with **4.3.2**, **4.4** and **4.5**.



#### 5.4.4 Remote supervision

**5.4.4.1** Where remote supervision has been identified in accordance with 4.3.2, the venture provider shall be satisfied that the participants have the necessary competence for the venture to be supervised remotely.

*NOTE Remote supervision is the minimum level of supervision for individual placements/lone workers. This may be supplemented by direct and/or indirect supervision arranged by the venture provider with third parties.*

**5.4.4.2** Full details of responsibilities and how the remote supervision functions shall be provided to participants (and other stakeholders on request) before the venture starts. Where a participant is under 18 years of age or a vulnerable adult, this information on how the remote supervision will function shall also be provided to the participant's parent or legal guardian.

*NOTE Remote supervision is rarely suitable for participants under 18 or for vulnerable adults.*

**5.4.4.3** When supervision is remote, the venture provider shall ensure that:

- a) participants are sufficiently trained and assessed as competent for the anticipated level of difficulty of the planned activity, including safe conduct and emergency procedures;
- b) clear and understandable boundaries are set, including the participant understanding the additional responsibilities placed upon them;
- c) there is a clear line of communication from the participant to the remote supervisor;
- d) the remote supervisor monitors the participant's progress;
- e) there is a recognized point at which the activity is paused or suspended while the participant is on time outside the jurisdiction of the venture provider and when it is completed/terminated;
- f) when the activity cannot be completed safely, there are clear arrangements to adjust the level of supervision or adjust or terminate the activity.

**5.4.4.4** The venture provider shall ensure that the remote supervisor has the competence and the resources to intervene in a manner determined by the safety management system in accordance with 4.3.2, 4.4 and 4.5.

*NOTE Management of indirect or remote supervision is likely to include instructions relating to:*

- a) *the start and finish times and locations;*
- b) *clear geographic boundaries;*
- c) *any required or prohibited activities;*
- d) *an explanation of any additional responsibilities placed upon the participant;*
- e) *where and how a member of the leadership team can be contacted;*
- f) *whether a member of the leadership team actively monitors the participants or not;*
- g) *any arrangements to pause remote supervision if this becomes necessary;*
- h) *whether participants are required to tell the leadership team of their intentions for all or parts of the time period and/or report out and report back.*

## 5.5 Induction and training

### 5.5.1 General

**5.5.1.1** The venture provider shall use the risk assessment in accordance with **4.3.2** to define competencies required in both the leadership team and participants. Any shortfall between current and required competencies shall be mitigated via induction and training.

**5.5.1.2** The venture provider shall verify that:

- a) all identified pre-venture and on-venture induction and training have been provided;
- b) competency has been achieved by both the leadership team and participants.

### 5.5.2 Leadership team

**5.5.2.1** The venture provider shall ensure that the leadership team receives training in:

- a) the venture provider's operating procedures;
- b) implementing the incident and emergency plan.

**5.5.2.2** The venture provider shall establish procedures that require the venture leader to introduce themselves and the members of the leadership team to the participants prior to or at the commencement of the venture.

### 5.5.3 Participants

#### 5.5.3.1 Prior to the venture

##### *COMMENTARY ON 5.5.3.1*

*It is good practice for a venture provider to keep a log indicating that each participant has received and acted upon the requests made in preparation for the venture, especially if a minimum standard is required for an individual to participate in any of the venture activities.*

*The venture provider should organize at least one pre-venture meeting with all participants and the leadership team where feasible. Where this is not possible this information should be given to all members of the venture in writing and a means of communication established to respond positively to any questions that might arise from this information.*

The venture provider shall ensure that information and advice are given in writing to participants for those parts of the venture that require:

- a) training related to any activities to be undertaken on the venture;
- b) procurement of safety or specialist clothing and equipment;
- c) language training;
- d) information on the venture location and venture activities to be undertaken;
- e) passports, visas and other essential travel documentation;
- f) preventative medical treatment against anticipated local hazards, especially any programme of vaccinations required by the medical risk assessment (see **6.7.4** and **6.7.5**);
- g) fitness appropriate to the physical demands of the venture;
- h) in-country or local orientation and/or training.

### 5.5.3.2 During venture

The venture provider shall inform the participants of their responsibilities during the venture, and the requirements in terms of:

- a) hygiene and health;
- b) behaviour: looking after themselves and others;
- c) cultural awareness;
- d) specific equipment;
- e) responding to incidents and emergencies.

## 5.6 Information to participants to enable informed consent

### 5.6.1 Informed consent

#### COMMENTARY ON 5.6.1

*A significant aspect of the standard in relation to participants is that of "informed consent". Participants should be enabled to choose what risks they are prepared to accept. The standard therefore requires providers to inform potential participants of the level of difficulty present in a venture and what ought to be done to manage the associated risks.*

The venture provider shall supply information to potential participants to enable them to make an informed decision to participate.

The venture provider shall supply information to participants as part of the pre-booking information (5.7.2), in the contractual information (5.7.3) and in the joining instructions prior to departure (5.6.3).

Additional information shall be provided to participants on:

- a) physical, emotional and psychological challenges expected;
- b) the environment: physical and cultural in accordance with 6.5;
- c) legal responsibilities in accordance with 5.7;
- d) induction and training requirements in accordance with 5.5;
- e) the availability of medical advice, services and support for the venture; recommended vaccinations and prophylaxis for the venture, guidance for the prevention of ill health and environment-related illnesses in accordance with 6.7;
- f) requirements for personal equipment in accordance with 6.8.

### 5.6.2 Consent for participants under 18 years of age and vulnerable adults

The venture provider shall ensure that, prior to the commitment to the venture, the parents and/or legal guardians of all potential participants under 18 years of age and vulnerable adults have given written consent for their charges to participate in the venture and its constituent activities.

### 5.6.3 Joining instructions

Before the start of the venture, the venture provider shall ensure that a participant (and any stakeholder when requested) is provided, in writing, with:

- a) identification of the times and locations for the start and finish of the venture;
- b) a venture itinerary stating timings, transport, accommodation and activity plans covered by the venture;
- c) any confirmed booking arrangements;
- d) aspects of the venture that are to remain flexible or cannot be confirmed;
- e) the contact details through which a message can be passed to a participant and information about the progress of the venture can be sought, and other communication options available to participants or their next of kin during the venture;
- f) information about any insurance cover in place for the participants, aspects of the venture not covered by insurance and the procedures for making an insurance claim;
- g) information about the complaints and compliments (feedback) procedure;
- h) arrangements for indirect and remote supervision, how this functions and the associated responsibilities;
- i) a summary of the incident and emergency response plan.

## 5.7 Legal framework and contracts

### 5.7.1 Host country legislation for overseas ventures

The venture provider shall ensure that, prior to the venture, the venture leaders and participants are aware of any laws in the host country that the provider has identified as relevant to the venture.

*NOTE 1 In ascertaining the laws of the host country, the venture provider should liaise with the embassies and police of the host country and also the in-country representative as necessary.*

*NOTE 2 Relevant host country legislation is likely to include laws relating to employment, driving, consumption of alcohol, religion, public liability in the host country, age of sexual consent, possession of narcotics, qualifications for venture activity specialist, possession and use (including administration in an emergency) of medical drugs (and the transportation of medical drugs across borders), obtaining and transporting specimens and souvenirs, and crossing international borders with minors.*

### 5.7.2 Venture pre-booking information

**5.7.2.1** The venture provider shall supply potential participants, and stakeholders when requested, with pre-booking information that is presented in a comprehensible and accurate manner which contains no misleading information. 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.

**5.7.2.2** Pre-booking information shall state:

- a) the name of the venture provider and contact details;
- b) an outline of the proposed purpose and content of the venture, including explanations of venture activities to be undertaken that allow participants to understand the anticipated level of difficulty;
- c) proposed timing and duration of the venture;

- d) notice of any safety, accessibility or inclusivity issues (e.g. relating to activities, transport or accommodation) that can be expected to affect participants or might not meet their reasonable expectations;
- e) the minimum competency required of the participants and leadership team;
- f) details of relevant licenses held by the venture provider;

*NOTE* Examples of licences are Air Travel Organisers' Licensing (ATOL) or Adventure Activities Licensing Authority (AALA).

- g) the price or price range of the venture.

**5.7.2.3** The venture provider shall inform the participant at what stage they are expected to commit to the venture.

### **5.7.3 Contractual information**

**5.7.3.1** The venture provider shall ensure that the contract between the venture provider and the participant is in writing and is presented in a comprehensible, accurate and accessible manner which contains no misleading information. Where the participant is under 18 years of age or a vulnerable adult, this contract shall also be provided to the participant's parent or legal guardian.

The contract shall contain information on:

- a) the name and address of the venture provider and an identified point of contact;
- b) where and when the venture begins and ends;
- c) the travel destinations and, where periods of stay are involved, the relevant periods, with dates;
- d) the venture itinerary, including details and explanations of venture activities to be undertaken that allow participants to understand the nature and anticipated level of difficulty of the activity to be undertaken;
- e) the means, characteristics and categories of transport to be used and the planned dates, times and points of departure and return;
- f) where the venture includes accommodation, its nature and location;
- g) the meals which are included in the delivery of the venture;
- h) the gender mix of the leadership team;
- i) the price of the venture, including an indication of the possibility of any price revisions and an indication of any costs of the venture not included in the price of the venture (such as dues, taxes or fees chargeable for certain services, including landing, embarkation or disembarkation fees at ports and airports, and tourist taxes);
- j) all visits, excursions and other services which are included in the total price agreed for the venture (such as provision of porters);
- k) any circumstances in which cancellation of the venture could occur;
- l) the insurance arrangements for the venture in accordance with **3.9**;
- m) the responsibility of participants to ensure they comply with passport and visa requirements and health formalities required for the journey and the stay;
- n) the behaviour required of a participant and the sanctions for not complying with these behavioural requirements, including who is to arrange and pay for repatriation if a participant is required to leave the venture on grounds of inappropriate behaviour;

- o) arrangements for the start and finish of any time outside the jurisdiction of the venture provider occurring during the venture;
- p) the arrangements which apply if participants are delayed at the outward or homeward points of departure, or a statement that no arrangements exist;
- q) the payment schedule and method of payment;
- r) any additional requirements agreed between the participant and the venture provider;
- s) procedures and timing for making a complaint or providing feedback;
- t) the arrangements for security for the money paid over and (where applicable) for the repatriation of the participant in the event of insolvency.

**5.7.3.2** The venture provider shall provide the information set out in **5.7.3.1** to the participants (and stakeholders when requested) either within the contract document or at such time to be specified within the contract.

#### **5.7.4 Termination of contract**

**5.7.4.1** The venture provider shall specify in the contract from the outset the financial penalty, if any, should the participant withdraw at the point of receipt of the information required in **5.7.3.1** or subsequently.

**5.7.4.2** If, after signing of the contract, any of the information required in **5.7.3.1** is either provided for the first time in accordance with **5.7.3.2** or revised, the new or revised information shall be provided to the participant (and stakeholders when requested) in a separate document prior to departure, written in a legible, comprehensible and accurate manner which contains no misleading information.

**5.7.4.3** The venture provider shall ensure that, upon provision of the information set out in **5.7.4.2**, each participant agrees to proceed with the venture on that basis. Where this new or revised information relates to circumstances that change the level of difficulty or the risks likely to be faced, each potential participant shall be given the opportunity to withdraw.

*NOTE The financial penalty should represent the genuine pre-estimate of the costs incurred by the venture provider to this stage and should not represent a punitive penalty charge. It is clearly beneficial if this information is provided prior to signing of the contract and, at the latest within the contract.*

## **6 Venture elements**

### **6.1 Overall accountability**

The venture provider shall be accountable for all elements of the venture, whether delivered by the venture provider or outsourced to a third party. This shall include the performance of all services.

### **6.2 Third party provider**

**6.2.1** Where a decision is taken to involve third party providers, the venture provider shall select third party providers who comply with the clauses of BS 8848 that apply to the venture elements to be outsourced.

**6.2.2** The selection of a third party provider shall be on the basis of an assessment undertaken by the venture provider or on the venture provider's behalf by an identified competent person.

**6.2.3** The venture provider shall review any third party provision against the specific requirements of the venture, taking account of the known or anticipated participant profile and the nature and needs of the venture. This shall include:

- a) risk to the venture of financial insolvency of a third party provider;  
*NOTE Financial protection can be delivered through bonding and insurance arrangements.*
- b) public liability insurance in accordance with **3.9.2** and third party insurance in accordance with **3.9.3**;
- c) risk assessment and management system in accordance with Clause **4**;
- d) incident and emergency planning arrangements in accordance with **3.7**.

**6.2.4** The venture provider shall inform the leadership team of specific aspects of the third party provider's service requiring appraisal by the leadership team before and during use, with a concurrent contingency plan (see **3.7**).

**6.2.5** Prior to confirmation of selection, the venture provider shall agree with the prospective third party provider any additional requirements to be met.

**6.2.6** A list of third party providers shall be made available when requested by participants, the leadership team or stakeholders.

*NOTE Additional requirements for the provision of transport and accommodation are specified in **6.3** and **6.4** respectively.*

### **6.3 Travel**

The venture provider shall:

- a) verify that the travel elements of the venture itinerary are:
  - 1) able to meet the needs of the venture, particularly in respect of timing, availability and budget;
  - 2) suitable for the participants as identified in accordance with **5.2**; and
  - 3) risk assessed in accordance with Clause **4**;
- b) select third party providers of transport services in accordance with **6.2** and brief transport providers on their duties and responsibilities;
- c) advise participants (and stakeholders when requested) of the transport arrangements and provide additional guidance if the transport is expected to be outside the participants' experience and of any safety or accessibility issues that might reasonably be expected to affect the participants;
- d) have a procedure for assessment by a member of the venture leadership team at embarkation to ensure that transport provided is not unsafe;
- e) provide an explanation of the methods used to select the transport modes/providers if requested by participants, the leadership team or a stakeholder;
- f) have a contingency plan in place for travel in accordance with **3.7**.

*NOTE The risks associated with travel and transport overseas can be considerably reduced by not travelling after dark, wearing seatbelts and ensuring drivers are not fatigued or under the influence of alcohol or drugs.*

## 6.4 Accommodation

The venture provider shall:

- a) verify that the accommodation used meets the needs and objectives of the venture and is consistent with the needs of the participants as identified in accordance with 5.2;
- b) risk assess the accommodation elements of the venture itinerary in accordance with Clause 4;
- c) select third party providers of accommodation in accordance with 6.2;
- d) implement a procedure for checking the safety and suitability of all accommodation and make the criteria for this assessment available on request to participants and stakeholders;
- e) advise participants (and stakeholders when requested) of the accommodation arrangements and provide additional guidance if the accommodation is expected to be outside the participants' experience, there are any safety or accessibility issues that affect the participants, and/or any training is needed in the safe construction and/or safe use of temporary accommodation;
- f) have a contingency plan for accommodation in place in accordance with 3.7.

*NOTE Persons making checks should be competent to do so. Suitable safety checks depend on the accommodation type, but can include:*

- 1) *fire safety (means of being made aware of a fire, means of escape and means of fighting fire);*
- 2) *stoves and open fires used for cooking and heating;*
- 3) *personal security and/or protection;*
- 4) *hygiene, including that relating to food and drink;*
- 5) *general safety of the structure and facilities of the accommodation (e.g. electrics, gas heaters, balconies, pools and lifts);*
- 6) *environment around the accommodation;*
- 7) *existence of third party liability insurance;*
- 8) *management and staff competence and reputation.*

## 6.5 Environment: physical and cultural

**6.5.1** The venture provider shall ensure that the leadership team is competent to operate in the destination environment of the venture.

**6.5.2** The venture provider shall ensure that participants (and stakeholders when requested) are informed about:

- a) the physical environment;
- b) the cultural/human environment;
- c) relevant legal responsibilities in accordance with 5.7.1;
- d) minimizing the venture's impact on the environment.

**6.5.3** The venture risk assessment shall include a section on environmental hazards and associated management measures in accordance with 4.3.2.



**6.5.4** The venture provider shall identify and implement procedures for acclimatization to all environments to be experienced on the venture.

*NOTE* Acclimatization should include the need to allow time for recovery from travel, especially if multiple time zones have been crossed, the impact of culture shock and adjustment to local conditions, e.g. heat, altitude and cold. For ventures in extreme environments (e.g. high altitude), venture providers should seek specialist advice on acclimatization and make the sources of this advice available to all members of the venture.

## **6.6 Venture activities**

**6.6.1** The venture risk assessment shall include a section on venture activities and associated management measures in accordance with Clause 4.

**6.6.2** The venture provider shall identify the principal sources of technical advice used to define the competencies of the leadership team and participants and risk management procedures used for venture activities.

**6.6.3** Training requirements related to activities to be undertaken on the venture shall be identified and communicated to the leadership team and participants.

## **6.7 Medical**

### **6.7.1 General**

The venture provider shall have access to medical advice, services and support for each venture. The availability of these services shall be outlined to the participants and leadership team (and other stakeholders on request) before the contract is concluded.

*NOTE 1* This does not imply that there necessarily be a doctor on the team. However, it emphasizes the need for effective qualified medical advice to the venture.

*NOTE 2* Requirements for medical insurance are given in 3.9.4.

### **6.7.2 Medical planning**

**6.7.2.1** The venture provider shall undertake a risk assessment of the medical hazards associated with the venture in accordance with 4.3.

*NOTE* This should be approved by a registered medical professional with expertise relevant to the venture.

**6.7.2.2** The venture provider shall have a medical screening process for the leadership team and participants in accordance with 6.7.3.

*NOTE* This should be approved by a registered medical professional with expertise relevant to the venture.

### **6.7.3 Pre-existing medical conditions**

**6.7.3.1** The venture provider shall obtain written confirmation of whether or not the members of the venture have any known pre-existing medical conditions, including psychological health issues, and any medication being taken.

**6.7.3.2** The venture provider shall examine the information on any pre-existing medical conditions provided in accordance with the medical screening process in **6.7.3.1** and, in cases where the condition might be exacerbated by the venture, a letter from the participant's doctor or medical specialist shall be requested confirming fitness to participate in the venture. In these cases, the venture provider shall provide details of the venture to enable the doctor to make an informed decision.

*NOTE 1 Incidents involving pre-existing conditions can be exempt from insurance or attract a higher premium.*

*NOTE 2 Insurers may refuse insurance on the grounds of pre-existing medical conditions.*

#### **6.7.4 Prevention of ill health: vaccinations and prophylaxis**

The venture provider shall ensure that the leadership team and participants are informed about sources of information on vaccinations and prophylaxis necessary for the venture, and shall advise them to seek guidance as to the health implications of travel to the intended destination from their general practitioner, practice nurse or travel health clinic. This information shall be provided in time to enable the participants to complete any necessary courses of vaccination.

*NOTE If the participant is under 18 or a vulnerable adult, any information about necessary vaccinations and prophylaxis should be provided to a parent or legal guardian.*

#### **6.7.5 Environment-related illnesses**

**6.7.5.1** The venture provider shall ensure that the leadership team has knowledge of the risks, prevention, recognition and treatment of environment-related illnesses as identified by the risk assessment (see **4.3**).

**6.7.5.2** The venture provider shall ensure that participants are informed as to the prevention, recognition and actions to be taken on recognition of signs of the onset of environment-related illnesses (e.g. dehydration, heat-related illness, altitude sickness) which could be experienced on the venture.

**6.7.5.3** For ventures in malarial zones the venture provider shall ensure that all the leadership team and participants are informed as to the recommended health information to minimize the risks of malaria, including prevention tablets, standby treatment, mosquito nets, insect repellents and clothing.

**6.7.5.4** The venture provider shall identify and manage the hazards associated with food, drink and hygiene overseas because these might vary substantially from the UK.

#### **6.7.6 Medical expertise**

**6.7.6.1** The venture provider shall ensure that medical services are provided by registered medical professionals with expertise relevant to the venture.

**6.7.6.2** The venture provider shall check the first aid qualifications of the leadership team and ensure that they are commensurate with the needs of the venture.

**6.7.6.3** The venture provider shall provide a method for the leadership team to communicate during the venture with a medical professional who has expertise relevant to the venture.

**6.7.6.4** The venture provider shall establish and operate a procedure to ensure that any medical treatment or support that has been administered during the

venture is documented. With the patient's consent, this information shall be made available to their general practitioner when requested.

*NOTE 1 Access to medical services can be through either the venture provider's or participants' personal medical insurance and in-country medical facilities.*

*NOTE 2 Ventures in remote regions with limited access to medical facilities should appoint a medical professional (e.g. doctor, nurse or paramedic) as part of the leadership team. If this is not possible, the venture provider should ensure that one or more of the leadership team attends a wilderness first aid course or equivalent, in addition to their first aid qualification.*

### 6.7.7 First aid provision

The venture provider shall ensure that first aid provision, including first aid and medical kits:

- a) meet a specification prepared by a medical professional with knowledge and experience relevant to the venture; and
- b) are available on the venture.

### 6.7.8 Medical protocols

**6.7.8.1** The venture provider shall ensure that the leadership team are informed of the medical protocols specific to the venture.

**6.7.8.2** The venture provider shall ensure that the leadership team have received training in the use of the first aid and medical kits used on the venture.

**6.7.8.3** Any prescription drugs carried shall be logged and only prescribed to a participant on the authorization of a registered medical professional.

*NOTE 1 Authorization from a registered medical professional can be via protocol, verbal instruction or direct supervision.*

*NOTE 2 It is recommended that prescription drugs are accompanied by a signed doctor's letter or certificate.*

## 6.8 Equipment

### 6.8.1 Identification and acquisition

The venture provider shall establish procedures to ensure that equipment necessary to the venture is identified and that sufficient items are acquired accordingly.

### 6.8.2 Conditions of use

**6.8.2.1** The venture provider shall ensure that equipment to be used is fit for purpose, and is operated in accordance with the manufacturer's stated instructions (other than as provided for in **6.8.2.2**) by competent people.

**6.8.2.2** Where equipment is to be used in a manner other than in accordance with the manufacturer's stated instructions, a risk assessment shall be undertaken and appropriate risk management measures implemented.

**6.8.2.3** The venture provider shall ensure that personal protective equipment and training in its use is identified in the risk assessment.

*NOTE The venture provider may use a subject matter expert to provide guidance and training to the leadership team on the suitability, use and maintenance of equipment.*

### 6.8.3 Maintenance

All equipment provided and managed by the venture provider shall be subject to a managed and documented checking, maintenance and exchange process. The venture provider shall retire all equipment in line with manufacturers' guidance. Equipment that is damaged or in need of repair shall be clearly marked as such.

*NOTE* If the equipment is unserviceable it should be isolated to prevent use.

### 6.8.4 Participants' personal equipment

**6.8.4.1** A clear, written statement with precise details of the sort of personal equipment which participants need shall be supplied to participants pre-venture.

**6.8.4.2** The venture provider shall instruct the venture leader to check that the personal clothing and equipment of all members of the venture are suitable for use during the venture.

### 6.8.5 Condition of hire equipment

**6.8.5.1** The venture provider shall ensure that there is a procedure to confirm the suitability of all hired equipment at the point of hire.

**6.8.5.2** Any hired critical safety equipment (e.g. ropes and buoyancy aids), and maintenance records if they exist, shall be checked in accordance with **6.8.2**.

## 7 Review

### 7.1 Venture reviews

The venture provider shall ensure that, for the venture:

- a) all participants, the leadership team and stakeholders as defined in accordance with **5.3**, have an opportunity to provide feedback on the activities, services and facilities provided;
- b) the complaints and compliments are reviewed;
- c) a written internal reporting and review system for operational incidents, accidents and "near misses" is in place and lessons learned and corrective actions are recorded and implemented;
- d) an evaluation of all ventures is conducted, paying particular attention as to whether the original objectives were achieved.

### 7.2 Management system reviews

The venture provider shall complete an annual review of management systems, including the safety management system. Where weaknesses or failings are found these systems shall be revised. The review shall be documented with signed endorsement by directors of the venture provider (or their equivalent).

A review of specific aspects of management systems shall also be initiated by:

- a) significant incidents, near misses, complaints or observations during the venture and reviewed on or subsequent to it;
- b) results of complaints, feedback or observations following the venture;
- c) major changes within the organization or changes that might impact on future ventures;
- d) the venture provider having reason to believe that the management systems might no longer be adequate;

- e) impact of changing legislation;
- f) findings and actions from completed audits, investigations and reviews.

*NOTE* Reviewing the safety management system in its entirety can reveal weaknesses or failings created by piecemeal changes over a period of time.

## 8 Claim of conformity by the venture provider

In making any claim of conformity, the venture provider shall consider, address and evidence conformity with all of the requirements of BS 8848:2014.

*NOTE 1* A claim of conformity with BS 8848:2014 represents a venture provider's declaration of compliance, i.e. a claim by or on behalf of the venture provider that the venture meets all the requirements of the standard. The accuracy of the claim is solely the claimant's responsibility.

A claim of conformity for a venture shall be documented in hard copy, electronic format or any other medium.

The claim shall identify the type of conformity assessment undertaken using the appropriate form of disclosure:

- a) in the case of self-assessment:
  - "The (unique identifier) venture(s) provided by [include unambiguous identification of the entity acting as venture provider] conforms to BS 8848:2014. Self-declared on [date]."
- b) in the case of other-party assessment:
  - for a sole venture shall be: "The (unique identifier) venture provided by [include unambiguous identification of the entity acting as venture provider] conforms to BS 8848:2014, declared by [identification of other party] on [date]."
  - for multiple ventures shall be: "All (unique identifier) ventures provided by [include unambiguous identification of the entity acting as venture provider] conform to BS 8848:2014, declared by [identification of other party] on the basis of the operating procedures and safety management systems evidenced on [day, month and year] and a sample of ventures examined to the year-end [year]."
- c) in the case of certification:
  - for a sole venture shall be: "The (unique identifier) venture provided by [include unambiguous identification of the entity acting as venture provider] conforms to BS 8848:2014, certified by [identification of certifying body] on [date]."
  - for multiple ventures shall be: "All (unique identifier) ventures provided by [include unambiguous identification of the entity acting as venture provider] conform to BS 8848:2014, certified by [identification of certifying body] on the basis of the operating procedures and safety management systems evidenced on [day, month and year] and a sample of ventures examined to the year-end [year]."

*NOTE 2* The term "certified" is used in this British Standard to describe the issuing of an attestation document by an independent third party certification body. The term "declared", appropriately qualified, is used to identify the other options accepted in this British Standard.

Annex A  
(informative)**The venture provider's guide to BS 8848****A.1 Using BS 8848 to deliver safe and successful ventures**

Whether this is the venture provider's first venture or it is a large provider planning many ventures, the numbers of elements that need to be considered are significant. This makes the design phase of a venture both challenging and rewarding. BS 8848, which reflects current good practice, aims to support this process by highlighting the requirements that enhance the delivery of a safe and successful venture. The standard sets out "what" to do, but not "how" to do it.

This annex outlines a number of ways that BS 8848 can be used to support this process.

**A.2 Using BS 8848 as a management tool**

The standard can be used as a support tool to benchmark venture planning and/or operational systems against current good practice. It can be used:

- a) as a step-by-step guide to planning a venture to help ensure that key elements are not missed;
- b) as a reference document to review organizational processes and check that all the key procedures are being implemented and help safeguard against errors related to poor planning or implementation;
- c) to assist in the selection of "third party providers" to help ensure services meet the venture requirements;
- d) to build internal knowledge and processes and enable continued improvement of venture provision.

**A.3 Using BS 8848 internally as a verification/assurance tool**

BS 8848 can be used by directors (or their equivalent) to verify that their venture(s) follows good practice. A self-assessment of the venture against the standard can also provide the directors (or their equivalent) with a better understanding of the risk exposure and mitigations.

The process of self-assessment involves checking that each of the requirements of the standard is met. The checklist in Annex C is provided to assist in this process. This process has the added benefit of enabling any gaps to be identified and subsequently resolved. The outcomes of this process can be used internally to drive improvements as well as to reassure stakeholders and others involved in the delivery of the venture.

**A.4 Using BS 8848 to indicate conformity to the wider public**

The key principle behind a claim of conformity is that all clauses (and therefore all requirements) have been addressed and met to an extent commensurate with the nature and type of venture and the competence of the leadership team and the participants.

The individual clauses of BS 8848 should be used to enable the venture provider to systematically identify and record the evidence for conformity. In providing the evidence, the venture provider is self-assessing that the venture conforms to BS 8848.

Self-declaration for each venture is a requirement whatever the type of conformity.

Whichever type of conformity is to be claimed, BS 8848 is very specific as to the words that are to be used in making that declaration; this is called a statement of conformity. These are set out in Clause 8 and should be followed precisely.

There are three ways of assessing conformity.

- a) Self-declaration: the key strength of self-declaration is that it provides confidence to potential participants, members of the leadership team, support staff and other stakeholders that they are properly informed by the venture provider about how the arrangements of the venture are managed, and their responsibilities in relation to the chosen venture, so that they can make an informed choice about their involvement.
- b) Other-party assessment: the use of other parties to assess conformity can offer increased objectivity. There are a number of providers of this service and venture providers are advised to select another party that meets their needs and is conversant with BS 8848.

In selecting a provider of this service the following aspects should be considered:

- 1) credibility of the auditing organization, including conflicts of interest and objective judgement;
  - 2) assessment process, including methodology;
  - 3) assessor competence, including subject knowledge, experience and qualifications;
  - 4) cost of the assessment against BS 8848;
  - 5) details of terms and conditions and relevant insurance including professional indemnity.
- c) Certification: third party certification can only be obtained through a body recognized by Government to assess against internationally agreed standards.

*NOTE At the time of this revision, BSI is not aware of any UK organization offering certification to BS 8848. A list of standards relevant to conformity assessment are given in the "Further reading" section of the Bibliography.*

## A.5 Summary

BS 8848 sets out to help ensure operational systems are effective at managing risk and help reduce the likelihood of incidents. In so doing, BS 8848 reassures those wishing to be involved in a venture, demonstrates a duty of care to employees and others, and provides a means of demonstrating that good practice has been followed.

Annex B  
(informative)

## Information to be supplied to the participant by the venture provider: for visits, fieldwork, expeditions and adventure holidays outside the UK

*NOTE This Annex is based on BSI's consumer leaflet, "Safer adventures: Managing the risks of adventure travel. A consumer's guide to the British Standard for adventurous activities outside the United Kingdom (BS 8848:2014)". A copy of this leaflet is available via: [www.bsigroup.com/consumers](http://www.bsigroup.com/consumers)*

### B.1 General

As a venture provider who conforms to BS 8848, participants wanting to join a venture can reasonably expect the recommendations of B.3 to be satisfied. In return, participants should expect to be involved in the risk management process and commit to reasonable behaviour in accordance with the code of conduct, as part of keeping themselves and others safe.

### B.2 BS 8848: the basics

This British Standard sets out safety requirements for all aspects of a venture, from activities to transport, staffing and accommodation.

BS 8848 has three core principles:

- a) informed choice: all risks should be assessed and clearly explained to participants before they book;
- b) single provider: there should be one organization that takes overall responsibility for the venture;
- c) capable staff: all ventures should be led by competent and experienced staff.

### B.3 BS 8848: the details

The standard can be used for all types of overseas ventures for young people and adults. Organizations that choose to conform to the standard should:

- a) assign clear roles and responsibilities:
  - identify one individual or organization as the venture provider with overall responsibility for all parts of the venture, including those run by third parties;
  - appoint a leadership team with relevant training, experience and knowledge of the activities and environment;
- b) plan and prepare:
  - assess all aspects of the venture, including travel, accommodation and equipment, for suitability and safety;
  - gather information about participants, including any medical conditions, to assess their ability to take part in activities and communicate, in writing, the level of fitness required to the participant;
  - communicate to the participant, in writing, the level of difficulty of the venture and of any activities to be undertaken during the venture;
  - advise the participant of any pre-trip training that is required;



- c) provide clear, accurate documented information:
  - prior to booking, about price, timings, itineraries, activities, staff expertise and safety issues;
  - after booking, about accommodation, transport, meals, payment schedules, insurance and personal equipment required;
  - about the participants' own responsibilities, for example to obtain relevant visas;
- d) appoint competent staff:
  - employ staff with good communication skills and proven competence for their role;
  - assign an overall supervisor who knows the skills of the group;
  - carry out checks on all staff working unsupervised with children under 18;
- e) be prepared:
  - develop written plans to analyse risks and manage safety;
  - make all staff aware of the risks of specific activities and locations, for example dehydration or altitude sickness, and develop procedures and manage the identified risks;
  - ensure staff have access to medical advice and support, and know what to do and who to contact in the event of illness, accident or emergency;
  - produce a written incident and emergency plan for each venture.

#### B.4 BS 8848: frequently asked questions

The following are the sorts of questions a venture provider should be capable of answering from potential participants.

- **Q. Am I choosing the right venture?** Where do I want to go? What do I want to do? How long do I want to go for? Am I fit enough to take part? What is the level of difficulty? What level of physical fitness, experience and/or skill level do I need? Do I require any pre-trip training and, if so, where can I train? What type of equipment is needed? Is this equipment provided and, if not, what do I need to provide? What will it cost in total?
- **Q. Check credentials.** Is the venture provided in accordance with BS 8848? If not, why not? Can I speak to previous participants?
- **Q. Know before you go.** Before I book, can you tell me what is involved in the venture? Where will we stay, what will we be doing and what are the potential safety issues? Will I have to carry heavy packs or equipment for all or any part of the venture? Will there be any dietary restrictions?
- **Q. Find out who is responsible.** Who is the venture provider and who is the venture leader? Has the venture leader got experience of leading similar ventures?
- **Q. Signing up.** May I read the terms of the contract before I book? If the participant is under 18, their parent or legal guardian will also need to read and sign the contract. What are the implications of withdrawing?
- **Q. Information pack.** Once I have booked, when will I receive a detailed pack of information about the venture?
- **Q. Complaints.** If I have any concerns, who should I speak to in the first instance? What is the complaints procedure?
- **Q. Emergency contacts.** What are the arrangements should someone need to make emergency contact while I am on the venture? What sort of

information or contact information do you require of me should I be involved in an incident during the venture?

Annex C  
(informative)

## BS 8848:2014 Self-declaration of conformity: supporting documentation and checklist

The following checklist may be used to support a self-declaration of conformity. The checklist follows the order of BS 8848:2014, and should only be used in conjunction with that document. All clauses of BS 8848:2014 should be considered in making this self-declaration.

Requirement for conformity	BS 8848:2014 principal subclause	Name, location and type of evidence (e.g. attached as appendix, electronic system)	Date and author
Identity of venture provider	3.1		
Unambiguous statement of purpose of the venture	3.2d)		
Dated version of the venture itinerary	3.3.3		
Permissions required for venture	3.4		
Costs of venture and any anticipated additional charges	3.5.1		
Times considered to be outside jurisdiction of the venture provider	3.6.2		
Contingency plans, including those for travel and accommodation	3.7.1, 6.3 and 6.4		
Incident and emergency response plan	3.7.2.1		
Communication plan: routine and emergency	3.8		
List of emergency contact numbers for leadership team	3.8.3.3		
Insurance provision	3.9		
Safety policy	4.1		
Written risk assessment and management documentation and provenance (dated)	4.3.2		
Competencies required of leadership team and verification required	5.1.1.2		

Requirement for conformity	BS 8848:2014 principal subclause	Name, location and type of evidence (e.g. attached as appendix, electronic system)	Date and author
Identity of in-country representative	5.1.6.1		
Criteria for inclusion as a participant in the venture	5.2.1		
List of stakeholders identified for venture	5.3		
Arrangements for management of remote/ indirect supervision and related disciplinary actions	5.4.1.3		
Pre-venture and on-venture training required for leadership team and participants and how this will be assessed	5.5.1.2		
Information for participants: <ul style="list-style-type: none"> <li>• pre-booking;</li> <li>• booking contract;</li> <li>• joining instructions</li> </ul>	5.5.3.1, 5.7.2, 5.7.3 and 5.6.3		
List of third party providers, including travel and accommodation, and assessment criteria used	6.2, 6.3 and 6.4.		
Sources of technical advice for venture activities	6.6.2		
Medical and first aid provision	6.7		
Procedures for equipment procurement, use and maintenance	6.8		
Post-venture reporting and review of safety management	7		

**Declaration**

I, the venture provider, confirm that:

- I have considered all clauses of BS 8848:2014; and
- whilst elements may be outsourced to third party providers I remain accountable for all aspects of the venture, including safety.

I declare that this venture ..... (unique identifier) provided by ..... [include unambiguous identification of the entity acting as venture provider] conforms to BS 8848:2014. Self-declared on ..... [date]."

<b>Name of the venture provider</b>			
<b>Name of the venture</b>			
<b>Dates for the venture (actual/projected)</b>			
<b>Name of signator</b>			
<b>Job title and contact details</b>			
<b>Signature</b>		<b>Date</b>	

## Bibliography

### Further reading

BS EN ISO 9001, *Quality management systems – Requirements*

BS EN ISO/IEC 17000, *Conformity assessment – Vocabulary and general principles*

BS EN ISO/IEC 17021, *Conformity assessment – Requirements for bodies providing audit and certification of management systems*

BS EN ISO/IEC 17050, *Conformity assessment – Supplier's declaration of conformity*

BS EN ISO/IEC 17065, *Conformity assessment – Requirements for bodies certifying products, processes and services*





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