

**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This British Standard supersedes BS 8848:2007+A1:2009, which is withdrawn.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

<b>Venture providers</b> <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>	<b>Ventures</b> <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>
<b>Participants in a venture</b> <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>	<b>Types of environment</b> <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".*