

Education Authority Document

South Africa 2027

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1. Introduction

The purpose of this document is to delineate some of the key procedures in place for Operation Wallacea trips to South Africa. When creating the document, reference has been made to the National Guidance produced by the OEAP (Outdoor Education Advisory Panel – see http://oeapng.info) in the United Kingdom in addition to guidelines from the Expedition Provider's Association and BS8848 (the British Standard for organising and managing visits, fieldwork, expeditions and adventurous activities outside the UK). Additional guidance has been sought from bodies including but not limited to the HSE (Health and Safety Executive) DfE (Department for Education), AALA, and numerous Acts of Parliament.

This document may be useful for a number of parties interested in the expeditions, in particular but not limited to: The Educational Visits Coordinator (or equivalent) appointed by the school or college; the senior teacher(s) accompanying the trip (the group leader); parents or guardians of the students on the trip; students or other participants on the trip.

2. Objectives and structure of the expedition

Objectives

The Operation Wallacea expeditions in South Africa have two key objectives:

1. To train the expedition participants in savannah ecology, marine ecology, and scuba diving (health allowing).
2. To perform habitat assessments and other surveys within a number of game reserves in South Africa in order to contribute to datasets used to advise reserve management.

Structure

There are two options for expeditions in South Africa, with each having a slightly different structure as outlined below. All expeditions are two weeks long and designed for multiple groups, all groups will share the same location and accommodation and there may be overlap between those groups for field work and lectures. The field teams and accommodation may be shared between school groups but an effort is made to reduce this unless requested.

The following map illustrates the locations of the sites:



Figure 1: Map of South Africa illustrating site locations

1) Terrestrial & marine – Somkhanda & Sodwana

The students first week will be spent at Somkhanda Community Game Reserve. During their week at the terrestrial site the students will participate in the savannah ecology course and perform a number of different field based surveys, being habitat assessments, bird point counts, and game transects.

After the first week, the group will travel by coach to the marine site in KwaZulu-Natal, Sodwana Bay. Here, those students medically fit to do so will complete a scuba diving course (PADI Open Water), and all students will complete a marine ecology course. Those students who are already dive trained (or those who do not wish to or are not able to learn to dive) will participate in a more in-depth version of the course, which will include in-water practicals by diving or snorkeling.

2) Terrestrial only – Gondwana

Students will spend 2 weeks at Gondwana Game Reserve in South Africa. Students will participate in the savannah ecology course and perform a number of different field based surveys, being habitat assessments, bird point counts, and game transects.

Start and finish of the expeditions

Groups need to arrange international flights to arrive in South Africa on the Friday before their expedition starts on the Saturday morning. Details of the requirements for flights for the various options are outlined in the following section. Groups can book additional nights' accommodation in Durban or Cape Town before and after their expedition as part of their internal travel package. Operation Wallacea will be responsible for the safety and welfare of the groups from the point at which they are met in the airport on the day they arrive, until they are dropped off at the airport on the day that they leave the country.

The only exception to this is if the group decides to organize their own excursions or accommodation independently – if this were the case, Operation Wallacea would liaise with the school to agree suitable start and finish times and locations, and would be responsible for the safety and welfare of the group between those designated points.

Travel arrangements

Operation Wallacea will book international flights for the group from their country of origin through to South Africa, unless it is specified by the group leader that the group wish to organize their own flights. Operation Wallacea will then arrange transport to and from the expedition sites at the start and finish of the expedition. Most groups will fly in on a Friday and depart on a Friday and as such their schedule follows one of the below options:

1) Terrestrial & marine – Somkhanda & Sodwana

Friday: land in Durban (DUR) in the AM (before 12:00), meet and depart airport between 13:00 and 14:00. Transfer to Somkhanda via bus directly to camp (approx. 5. Hours) for welcome dinner.

Saturday morning till Thursday morning: participate in terrestrial based courses and surveys.

Friday morning: travel from terrestrial site to Sodwana Bay via bus (approx. 3 hours)

Saturday afternoon to Friday morning: participate in marine based courses.

Friday morning: travel by bus from Sodwana Bay to Durban airport (approx. 5hrs) in time to meet return flight.

2) Terrestrial only - Gondwana

Friday: land in Goerge in the morning (before 11:00), meet and depart between 12:00 and 14:00. Transfer to Gondwana Game Reserve directly by bus (approx. 1.5 hours).

Saturday morning until the following Thursday morning: participate in terrestrial based courses and surveys.

Friday two weeks after arrival: travel by bus from Gondwana Game Reserve back to George (approx. 1.5 hours) in time to meet return flight.

3. Booking Process

School and college students have the option to either book as a group, where there is a contract between the school and Operation Wallacea, or as individuals, where the contract is between Operation Wallacea and the participant (and their parent or guardian, if the participant is under the age of 18 at the time of booking the expedition). Once a school group has demonstrated interest in the expeditions, they are given a full presentation about the site where students, parents and teachers have the opportunity to ask any questions they feel are necessary. Following from this the school, or collection of individuals, are given an agreed amount of time to secure their places on the trip with a deposit. Operation Wallacea's terms and conditions are made available prior to booking, and acceptance of those terms and conditions is necessary before the booking can be confirmed.

4. Inclusion

In line with the Equality Act (2010) Operation Wallacea's policy is to make all reasonable adjustments to enable students of all physical and mental ability levels to participate in the programme. Likewise, participants will not be discriminated against on the basis of any protected characteristic (e.g. gender, race or religion). Any specific needs (such as requirements due to religious customs, or those arising from a physical disability) are discussed with the school shortly after the booking has been made. If it is not possible to make

suitable adjustments without substantially jeopardising the quality or safety of the programme for the remainder of the participants, then those students unable to participate would be offered a full refund of any monies paid.

5. Risk Management

Prior to the expedition

A thorough assessment of all research sites and activities are completed before the start of each expedition and reviewed throughout via in-house audits. Risk assessment and management instructions are put in place for general activities (such as trekking), for specific activities (such as the marine invertebrate surveys) and specific sites (such as Somkhanda Game Reserve). The risk assessments are published on the Operation Wallacea website and hard copies are available on request, free of charge.

During the expedition

The risk management policies are dynamic and can be amended by the senior Opwall staff on-site should new or unforeseen risks present themselves. All medical incidents and near misses are recorded throughout the season, in addition to the completion of in-house audits. Any major incident (e.g. requiring emergency evacuation or significant deviation from the planned expedition activities) results in an incident report being written by the senior Opwall staff member on-site and statements being taken from parties involved as appropriate. Additionally, the Operation Wallace Senior Management Team is informed of any major incidents immediately, in case the in-country team should require any further support.

6. Training Before the Expedition

Operation Wallacea staff work closely with teachers to ensure that pupils are ready and prepared for the expedition abroad. Various joint meetings take place with the Operation Wallacea schools team and the teachers regarding facilities on site and skills required. A training package is sent to each of the schools including the following:

Details of the level of fitness required from the pupils

The level of fitness required by students is outlined in detail in the training presentation. For those students that have limited outdoors experience professional UK based outdoor adventure companies can be recommended to provide this additional training. Furthermore, bleep tests can be sent to the school to be carried out by teaching staff if this is deemed necessary or helpful.

Other information

Operation Wallacea also make available a student handbook (downloaded from the Opwall website) containing full details of the facilities at each site, the learning outcomes for the expedition, and the planned itinerary.
Additionally, participants are given a kit list (which is also available on the Opwall website) and some identification guides for the local fauna and flora. The Operation Wallacea staff are

always available to talk to any student, parent, or teacher, who has any questions about any aspects of the expeditions, and the preparation required.

7. Roles and competencies of designated leaders

Qualifications, licensing and technical competency

Operation Wallacea is not eligible for a license through AALA (Adventurous Activities Licensing Authority) as we do not conduct licensable activities and because we operate outside of the UK. Many of the activities organised by Operation Wallacea are research focussed and so no formal qualifications exist. Wherever possible though, the procedures for ensuring technical competency of key staff are in line with AALA recommendations. Where new staff are recruited (i.e. those who have not worked for us before) the selection process includes a review of the CV or resume, a telephone interview, and obtaining at least two positive relevant references from previous employers. The qualifications or experience levels necessary for the various activities are described below, in addition to the roles and responsibilities of the key staff.

Role of the teachers

The teachers accompanying the students are responsible for ensuring the safety of the group during their travel from their country of origin to South Africa. Flights can be purchased by the teachers or by Operation Wallacea, depending on the school's requirements.
Once the groups are met in South Africa by Operation Wallacea staff or partners, the teachers will be travelling with the group and are responsible for pastoral care issues, and for helping to organise their group. At the end of the expeditions the teachers and the group are returned to the airport and the teachers are responsible for accompanying the group back to their country of origin. During the expedition the responsibility for the safe provision of activities, and organising the full itinerary, rests with Operation Wallacea rather than the teachers accompanying a group, as the teachers are not expected to have specific technical expertise in activities such as SCUBA diving. However, the teachers should, prior to the trip, have familiarised themselves with the activities to be carried out. They also should have ensured that the Educational Visits Coordinator (or equivalent in their area) is aware of the trip and has been sent the relevant Operation Wallacea documents (e.g. risk assessments and this document) and that the trip has the approval of the senior management team at the school.

Role of Operation Wallacea staff

Venture Leader

The Venture Leader for this project is Bernice Hyett, who has been involved in running Opwall expeditions since 2019, and has been selected by Caroline Acton, Director of Operations for this venture. Bernice will be based at Somkhanda and will be mobile to visit Sodwana when needed. Bernice will ensure that in each of the locations the correct level of leadership is provided for each of the survey groups and that the various risk amelioration measures are being adhered to, in addition to ensuring that the overall objectives of the project are being met.

Bernice will also ensure that the agreed protocols for the different activities are being adhered to (for example we have a safe trekking procedure) and that volunteers and staff alike are properly briefed with regard to suitable conduct within their role whilst on the expedition.

Site manager – terrestrial sites

Each site will have its own site manager, which may be provided by either Operation Wallacea or our partners WEI depending upon the local needs of each site. The site managers will have received training from both organisations to ensure efficient and safe running of the site, and will be responsible for performing procedural audits. In the case where the site manager is provided by WEI, an Operation Wallacea representative will also be on site to ensure our standards are maintained.

Survey leaders – terrestrial surveys

All surveys will be led by a survey leader at a maximum ratio of 1 staff member to 9 students. Due to the nature and location of South African surveys the survey leaders will have been assessed by our local partners to ensure they have sufficient experience in leading groups within the South African reserve environment. All foot based surveys also have additional requirements within South African reserves, and as such there will also be support staff with additional qualifications – for example rifle handling competencies.

Site manager – Marine site

The site coordinator at Sodwana Bay will be provided by Operation Wallacea. The site manager will have received training from both organisations to ensure efficient and safe running of the site, and will be responsible for meeting the incoming groups and completing all the training and auditing the safety procedures for the camp and the in-water activities.

In-water activity leaders

In water scuba activities will be led by a PADI Dive Instructor or PADI Divemaster. Dive training will be conducted in groups no larger than 8 students to 1 Dive Instructor and 1 Dive Master. Qualified divers will be supervised in the water at a ratio no greater than 6 divers to 1 Divemaster. Snorkel activities will also be supervised at a ratio no greater than 6 snorkellers to 1 Divemaster or Rescue Diver. The dive operations in South Africa are overseen by Sodwana Bay Lodge Scuba Centre, who are a PADI 5-Star IDC training centre run by Greg de Valle, who is a PADI IDC Staff Instructor and has a large number of years' experience working and diving in South Africa.

Bus transfers

The bus transfers will be organised through Operation Wallacea's partner, Wildlife and Ecological Investments. WEI have been coordinating transfers of Operation Wallacea groups for a number of years, and ensure that all transfers are run in a safe and careful manner. Buses and transfer vehicles used are organised through local South African transport companies, and all utilize modern coaches that include seatbelts. All drivers are also given specific routes,

timings, and locations at which they are to stop on the transfers, and two drivers are used for longer journeys.

Transfers to and from surveys, and vehicle based activities

Some surveys will require a vehicle to access the survey site, while other activities undertaken may be entirely vehicle based. In these cases, the vehicle will be driven by a WEI or Operation Wallacea staff member who has proven experience driving safely in environments that contains large game. If driving on public roads, they are also required to have a PDP (professional driving permit), which is legally required in South Africa for people to drive paying guests. All drivers will be compliant with a driving policy that includes always driving at or below the speed limit, checking the vehicle prior to driving it, and reserve-specific requirements related to approaching game.

8. Medical Procedures

This section summarises the medical and evacuation procedures report which has a much more detailed description of the staffing, First Aid facilities and procedures to be followed.

Information and records

All participants will be required to enter their medical details onto the Operation Wallacea data portal. Details of how to log on are sent out upon receiving the booking from the participant. The data is stored securely and is initially only available to certain Operation Wallacea staff members, and, for groups of school students, the teacher leading the group. All medical forms are assessed by Operation Wallacea. The venture leader may seek to contact the participant to gather further information, which they would then enter on to the portal.

All medical problems, illnesses, injuries and near misses are recorded at each of the sites. At the end of the season, these data are collated and a health and safety report is completed and published on the website. This report classifies incidents into 7 categories and allows comparison between the expeditions and other activities. The policy of publication of the accidents and illnesses recorded on the expedition is a unique aspect of the Operation Wallacea expeditions and helps ensure the procedures on site are followed fully.

Medical facilities

A basic medical kit is provided at each site, the content of which is agreed prior to the season in consultation with professional medics. These kits are designed to deal with as many non-emergency medical eventualities as reasonably possible onsite, and also to support emergency incidents and stabilize a casualty for transfer to more extensive medical facilities where needed. Each site will have staff trained in first aid who are competent to use the medical kit provided.

9. Emergency Procedures

A document describing the medical and evacuation procedures in full, for South Africa, is available on the health and safety pages of the Operation Wallacea website. Carefully planned evacuation protocols are in place for the site in South Africa. All staff will have training on the evacuation procedures and protocols.

Because of the high variability of influential factors such as weather conditions and nature of potential injuries, a number of different evacuation scenarios must be prepared for prior to the season. All staff are fully briefed in these scenarios.

Once a major incident or emergency is identified the Venture Leader will advise Operation Wallacea HQ in the United Kingdom. The Venture Leader will take overall control as Incident Coordinator in conjunction with other senior staff if they are in a position to assist. Operation Wallacea's medical and evacuation plans are designed so that, in a serious incident, Operation Wallacea are able to be self-sufficient (and not reliant on a third party such as an insurer or medical assistance company) in terms of getting prompt and effective care to a patient, or moving that patient to care.

10. Insurance

All participants are required to have medical and travel insurance and to provide these details in advance of their expedition. Operation Wallacea have comprehensive combined liability insurance with up to £10,000,000 for public/product liability.

11. Safeguarding and Child Protection

We endeavour to ensure that all school students participating in our activities are safe in accordance with the Protection of Children Act (1989 and 2004). This is done a number of ways as outlined below. It is important to note that it is not possible, practical, and in many cases useful, to obtain government supported vetting checks (such as Disclosure and Barring Service) for all staff that students will come into contact with during their time on the expedition. As such Operation Wallacea adopts the following policies where vetting service checks are included where appropriate amongst other safeguarding methods, but are not the sole precaution taken.

Supervision and accompanying adults

Operation Wallacea offer a free teacher place with every 8 students thus giving an automatic ratio of at least 1 to 8. For each activity provided by Operation Wallacea in the field a ratio of 1 staff member to 9 students applies.

These ratios do not include other supervisory staff such as guides or cooks. Overall there is a level of at least 1 to 3 adult staff to students on site providing a very high level of supervision, and there are always both male and female staff members on site to assist with supervising groups. Teachers are asked to accompany students on as many activities as possible.

Sleeping and accommodation arrangements

Separate male and female sleeping facilities are available both in the terrestrial and marine sites. Accommodation for staff members and teachers accompanying the groups is also separate. Bathroom facilities are shared, but toilets are always private and lockable from the inside, as are the shower facilities. The details of the accommodation are sent out to participants prior to the expedition so that the school has plenty of time to consider any pastoral issues that may arise as a result of the sleeping arrangements.

Minimum number of students

No activities are planned which will involve a single pupil being accompanied or supervised by a single staff member or adult, without another pupil or adult being present. There may be occasions where a one-on-one situation is unavoidable (e.g. a student is struggling with one of the skills required to pass their SCUBA course, and the instructor spends some extra time with them working on that skill). These occasions, though, are rare and all staff members are fully briefed on how to conduct themselves when in these situations.

Vetting and Disclosure and Barring Service (DBS) checks

Staff who work for Operation Wallacea in the UK, and then lead the various expeditions around the World, are subject to an enhanced DBS check. All locations where students are sleeping have a DBS checked staff member in attendance. The teachers accompanying these school groups will, at the responsibility of their employer, be vetted through the DBS (or national equivalent system if one is available), and whilst on expedition will stay with the students overnight at each location.

Codes of Practice

All Operation Wallacea staff in the field are required to sign a code of conduct before they are employed. The Code of Conduct commits each staff member to not entering into relationships with school volunteers as well as conformity to restrictions on alcohol use and a complete ban on drug abuse. Operation Wallacea will dismiss staff that do not follow the code of conduct.

Training

All staff are, in addition to their code of conduct, given specific training on suitable conduct with young people. They are made aware of their position of trust and are given examples of how to behave in certain situations. Staff who do not speak English are read the code of conduct in their own language, and any staff employed by third party providers or partners are subject to the same code of conduct.

Complaints procedure

Any complaint by a school pupil about inappropriate behaviour from any staff member or other student will be treated as a formal complaint and documented. The accompanying teacher will be informed immediately and together with the senior Operation Wallacea staff member on site will investigate the complaint. If the complaint is upheld then any individuals

involved will be dismissed from the expedition and a police file created if a criminal offence has occurred.

12. Communications

Mobile phone coverage is comprehensive in South Africa. Students will be accompanied by a staff member with a mobile phone at all times whilst on the expedition. There are some areas within Balule reserve that do not have phone signal, but in order to minimize the risk staff members are also equipped with handheld radios. The phone signal in Dinokeng is more consistent and so mobile phone communication is sufficient.

13. Transport

All transport arrangements conducted by Operation Wallacea in the field are subject to stringent protocols. Road transport used to move pupils from various sites have been assessed by the Venture Leader in South Africa and are checked for road worthiness including condition of the tyres and visibility through the windshield. As per section 7, the drivers are subject to a code of conduct whilst on the road. The roads in South Africa are generally of good quality (tarmac rather than rock or dirt) although they can be very steep in places and as such the most important aspect of a safe transfer is that the vehicle is driven slowly and carefully, particularly when descending. This is continually monitored by the Operation Wallacea staff.

14. Accommodation and Camp Security

Students are never allocated accommodation on their own and are always as close to staff members as is practical. Accommodation will be in shared dormitories or large tents on the terrestrial sites, and in tents at the marine site. The safety and hygiene levels at the camp sites are the responsibility of the Venture Leader. All of the sites are public, so there may be small numbers of tourists present. Upon arriving volunteers will receive a full briefing detailing safety precautions to take with this in mind. There will be Opwall or WEI staff members in the camp sites at all times so that if there are any problems the students will know who to talk to. Each site has a lockable facility in which to store valuables. The participants are given a full health and safety briefing upon arrival in each camp and will only be able to leave the camp site if in a group as per the above operations protocols.

15. Integrity and Cultural Aspects of the Expedition

In addition to the drive to collect data for purposes of biodiversity monitoring and specific research projects, Operation Wallacea also attempts to ensure that local organisations and individuals are empowered and supported by the projects. In South Africa we work with WEI, assisting them in the collection of data aimed at creating a reserve management handbook. Annual reports of the current state of the terrestrial sites are also submitted to the reserve management, in the hope of better informing their future management decisions. By working directly with WEI, students will have the opportunity to learn about the local wildlife and conservation issues from locally trained guides.