



# **Education Authority Document**

## **Transylvania 2019**

## **Contents**

<b>1. Introduction .....</b>	<b>3</b>
<b>2. Objectives and structure of the expedition .....</b>	<b>3</b>
Objectives .....	3
Structure .....	3
Start and finish of the expeditions.....	4
Travel arrangements .....	4
<b>3. Booking Process.....</b>	<b>5</b>
<b>4. Inclusion .....</b>	<b>5</b>
<b>5. Risk Management .....</b>	<b>6</b>
Prior to the expedition .....	6
During the expedition .....	6
<b>6. Training Before the Expedition .....</b>	<b>6</b>
Details of the level of fitness required from the pupils .....	6
Other information .....	6
<b>7. Roles and competencies of designated leaders .....</b>	<b>7</b>
Qualifications, licensing and technical competency .....	7
Role of the teachers .....	7
Role of Operation Wallacea staff.....	7
<b>8. Medical Procedures.....</b>	<b>8</b>
Information and records .....	8
Medical facilities.....	9
<b>9. Emergency Procedures .....</b>	<b>9</b>
<b>10. Insurance .....</b>	<b>9</b>
<b>11. Safeguarding and Child Protection.....</b>	<b>9</b>
Supervision and accompanying adults .....	10
Sleeping and accommodation arrangements.....	10
Minimum number of students .....	10
Vetting and Disclosure and Barring Service (DBS) checks.....	10
Codes of Practice .....	10

Training.....	10
Complaints procedure.....	11
<b>12. Communications .....</b>	<b>11</b>
<b>13. Transport.....</b>	<b>11</b>
<b>14. Accommodation and Camp Security .....</b>	<b>11</b>
<b>15. Integrity and Cultural Aspects of the Expedition .....</b>	<b>11</b>

## **1. Introduction**

The purpose of this document is to delineate some of the key procedures in place for Operation Wallacea trips to Transylvania. 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 Transylvania have two key objectives:

1. To train the expedition participants in grassland ecology and lowland European species.
2. To gather data from various locations across the Tarnava Mare region of Transylvania for the NGO Fundația ADEPT.

### **Structure**

This expedition is different to the other Operation Wallacea expeditions in that the teams are mobile throughout their stays and are spending six nights in picturesque Saxon villages in the foothills of the Carpathians. If coming for a two week expedition, their time will be spent in two separate villages. Each team will visit key survey locations in the nearby valleys and villages.

The survey areas are located from the West to the East of the Tarnava Mare Natura 2000 site in Transylvania. Survey sites have been chosen using aerial photographs and they will sample a significant area of the Natura 2000 site and concentrate in particular on biodiversity hotspots.

In each area the students will be split into groups and over the course of their stay and will have the chance to participate in each of the study teams on a rotational basis. They will also have the opportunity to locate bears, visit local farms, attend local cultural festivals and experience the unique architecture of the area (the Natura 2000 site has three UNESCO world heritage sites), when opportunities are available.

The following map illustrates the locations of the sites:

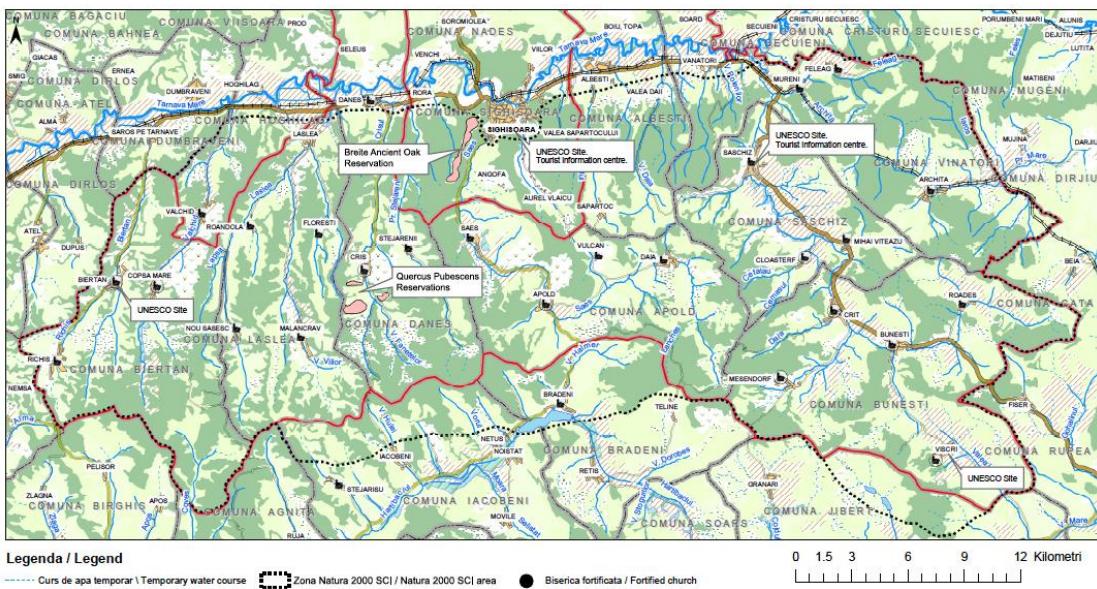


Figure 1: Tarnava Mare Natura 2000 site with Saxon villages

## Start and finish of the expeditions

Groups need to arrange international flights to arrive in Romania on the Tuesday, before their first day of activities begins on the Wednesday. Return flights can be arranged any time after 10:00 on the Wednesday after the final day of activities. Operation Wallacea will be responsible for the safety and welfare of the groups from the point at which they are met outside the airport on the day they arrive, until they are dropped off at the international departure gate at the airport on the day that they leave the country. The only exception to this would be if the group decide to organize their own excursions in Romania prior to or after participating in the Operation Wallacea expedition. 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 Transylvania, 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 Tuesday and depart on a Wednesday and as such their schedule will be as follows:

## Two Week Expeditions

**Tuesday:** Land in Transylvania (at Cluj-Napoca airport) early afternoon or late evening, travel by bus to hotel in Sighisoara where they will overnight.

**Wednesday:** Have breakfast in Sighisoara then transfer to the village at around midday.

**Wednesday evening to Wednesday morning:** participate in grassland based courses and surveys.

**Wednesday morning to Wednesday evening:** move to the second village

**Wednesday evening to Tuesday morning:** participate in grassland based courses and surveys.

**Tuesday lunchtime:** leave second village and transfer to a hotel in Sighisoara.

**Wednesday morning:** Depart from Sighisoara in time for an international flight.

## **Two Week Expeditions**

**Tuesday:** Land in Transylvania (at Cluj-Napoca airport) early afternoon or late evening, travel by bus to hotel in Sighisoara where they will overnight.

**Wednesday:** Have breakfast in Sighisoara then transfer to the village at around midday.

**Wednesday evening to Tuesday morning:** participate in grassland based courses and surveys.

**Tuesday lunchtime:** leave second village and transfer to a hotel in Sighisoara.

**Wednesday morning:** Depart from Sighisoara in time for an international 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 small mammal surveys) and specific sites (hotel on arrival). 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 Wallacea 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 Transylvania. Flights can be purchased by the teachers or by Operation Wallacea, depending on the school's requirements.

Once the groups are met in Transylvania 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. 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 is responsible for the overall running of the project. The 2019 venture leader is Toby Farman. He has significant experience in leading and managing groups, having worked with Operation Wallacea since September 2010.

He 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.

Toby 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 regarding suitable conduct within their role whilst on the expedition.

### **Survey leaders – terrestrial surveys**

All surveys will be led by a survey leader at a maximum ratio of 1 staff member to 8 students. The survey leader will have, as a minimum, an undergraduate degree in a relevant discipline (or relevant experience) and experience in leading young people or students in an outdoor education setting. All survey leaders will receive on-site training in protocols for leading small groups on short treks, such as those likely to be encountered in Transylvania.

### **Bus transfers**

The bus transfers will be organised through our in country partners Fundatia ADEPT. They will ensure that all the vehicles used comply with European regulations and are driven in a safe and careful manner. All their drivers have over 5 years' experience driving in Transylvania and drivers will advise all passengers to wear seatbelts.

### **Transfers to and from surveys**

Some surveys will require a vehicle to access the survey site. In these cases, the vehicle will be driven by Operation Wallacea staff who will have a minimum of 5 year's driving experience and who will be given instruction on safe driving in Transylvania and will be compliant with a driving policy which includes always driving at or below the speed limit and checking the vehicle prior to driving it for safety.

## **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.

Opwall expedition costs include a comprehensive travel insurance policy including unlimited Overseas Medical and Travel Expenses, cover for Personal Property and Cancellation, Curtailment and Rearrangement cover for all participants. This is provided by Zurich Insurance Group, one of the world's largest insurance groups, with about 55,000 employees serving customers in more than 170 countries. Details of this can be found by the website at <https://www.opwall.com/resource/insurance/>

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 Transylvania, is available on the health and safety pages of the Operation Wallacea website.

Carefully planned evacuation protocols are in place for the site in Transylvania. 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**

Operation Wallacea has purchased a comprehensive travel insurance policy on behalf of all of its participants which includes personal property, cancellation, curtailment and rearrangement cover as well as unlimited overseas medical and repatriation expenses. Operation Wallacea prepare detailed evacuation plans which are passed to insurers so that any Medivac planes and hospitals likely to be used during an evacuation can be contracted in advance and if there is a need for an evacuation then there are no delays. In addition to this, 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 8 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 4 adult staff to students on site providing a very high level of supervision. Teachers are asked to accompany students on as many activities as possible.

## **Sleeping and accommodation arrangements**

Separate male and female sleeping facilities are available in all villages. 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. 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 fairly comprehensive. Students will always be accompanied by a staff member with a mobile phone at all times whilst on the expedition. There are three villages where phone signal coverage is poor. When groups are surveying in these areas, there will always be a second staff member who can, if needed, move quickly to an area with phone signal should there be a problem. Groups will also carry radios to be able to communicate needs with the base camp.

## **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 Transylvania and are checked for road worthiness including condition of the tyres. As per section 7, the drivers are subject to a code of conduct whilst on the road. The roads in Transylvania are generally of good quality (tarmac rather than rock or dirt) the most important aspect of a safe transfer is that the vehicle is driven slowly and carefully. 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 tents in the villages Richis, Mesendorf, Crit, Daia, Apold, and Malancrav, in dormitories in Nou sasesc and in local guesthouses in Viscri. The safety and hygiene levels at the camp sites are the responsibility of the Venture Leader. Upon arriving volunteers will receive a full briefing detailing safety precautions to take with this in mind. There will be Opwall staff members in the camp sites at all times so that if there are any problems the students will know who to talk to. 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 Transylvania we are partnered with the organisation Fundatia ADEPT who work within local communities to conserve traditional farming techniques and provide additional sources of income. Furthermore, there are occasional opportunities for visits from local schools which can not only benefit the local students in that they can learn about biodiversity, but are also a cultural exchange opportunity for students on the trip as they are able to meet and interact with students from Transylvania.