Education Authority Document

Mexico 2022

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Introduction

The purpose of this document is to delineate some of the key procedures in place for Operation Wallacea trips to Mexico. 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.

Operation Wallacea are members of the Expedition Providers Association (EPA) and hold a Learning Outside the Classroom quality badge (LOtC).

Objectives and structure of the expedition

Objectives

The Operation Wallacea expeditions in Mexico have two key objectives:

1) to train the expedition participants in neotropical terrestrial ecology, neotropical marine ecology, and scuba diving (health allowing).
2) to gather data from Calakmul Biosphere Reserve and Akumal on the populations of birds, bats, large mammals, herpetofauna, forest structure, marine invertebrates, reef fish and turtles.

Structure

Students will spend 2 weeks in Mexico. Their first week will be spent in one of two camp sites in the forest. These camps are called KM20 and Hormiguero. These expeditions are designed for multiple groups, so any given group (i.e. from one school or college) could be at any of the camp sites. During their week in the forest the students will participate in the terrestrial ecology course and the surveys outlined above. They will in addition, have the opportunity to visit the local Calakmul archaeological site.

After the first week, the group will travel by coach to the marine site where they will stay in a dormitory style accommodation ten minutes drive from the town of Akumal. Here, those students medically fit to do so will complete a scuba diving course (PADI Open Water), and they 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. The following map illustrates the locations of the sites:

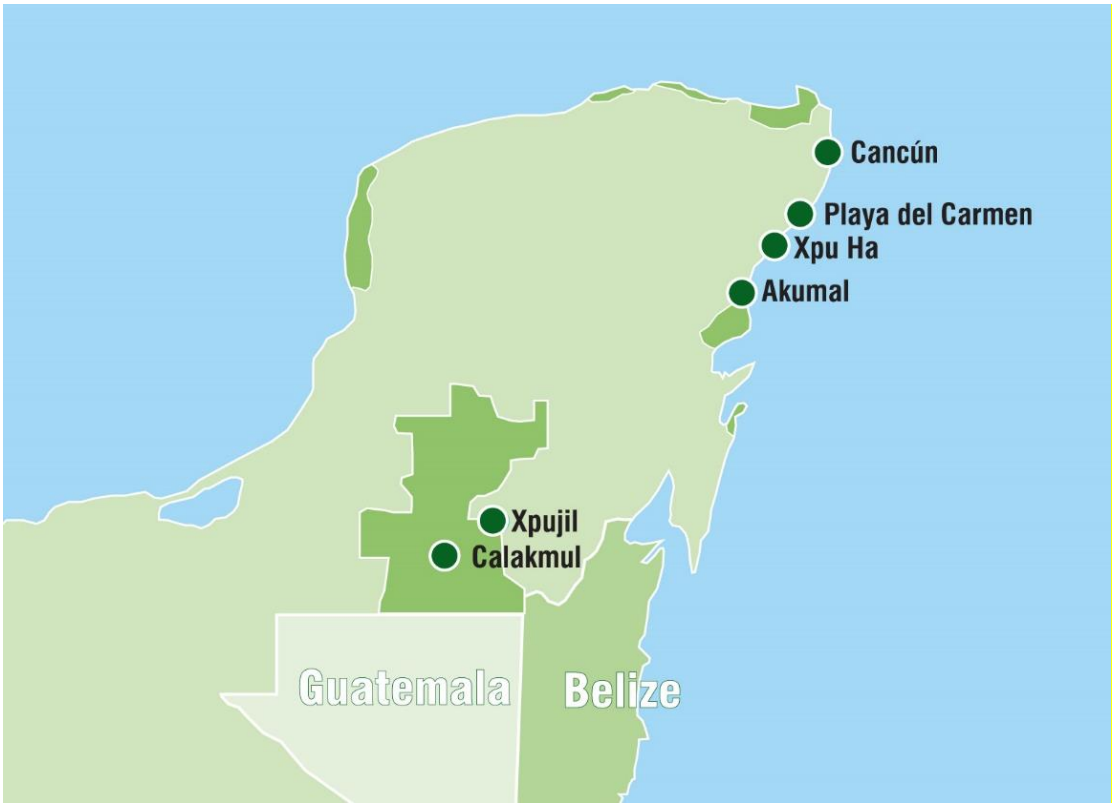

Figure 1: Map of the Yucatan Peninsula showing Operation Wallacea locations in Calakmul and Akumal.

Start and finish of the expeditions

Groups need to arrange international flights to arrive in Mexico on the Sunday, before their first day of activities begins on the Monday. Return flights can be arranged anytime after 16:00hrs on the Sunday after the final day of marine activities on the marine site. 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 Mexico 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 Mexico, 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 Sunday and depart on a Sunday and as such their schedule will be as follows:

- Sunday: land in Mexico (Cancun Airport) late afternoon, transfer to hotel in Cancun (1/2 hr approx).
- Monday: Transfer by bus from Cancun to forest site (8hrs approx.).

- Monday afternoon to Monday morning: participate in forest based courses and surveys.
- Monday morning: travel by bus to the marine site at Akumal (7 hrs approx).
- Monday afternoon to Sunday morning: participate in marine based courses
- Sunday morning: travel by bus from Akumal to Cancun airport (1.5 hr approx.) in time to meet return flight.

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.

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.

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 turtle surveys) and specific sites (such as Akumal). 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.

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.

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 Mexico. Flights can be purchased by the teachers or by Operation Wallacea, depending on the school's requirements.

Once the groups are met in Mexico 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 is responsible for the overall running of the project. The 2022 venture leader is Caroline Acton. She is the Senior Operations Manager for Operation Wallacea and has significant experience in leading and managing groups, managing Operation Wallacea sites for over 15 years.

She 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.

Caroline 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 forest camp will have its own camp manger appointed by the venture leader prior to the field season. Each camp manager has relevant previous experience in running field camps. The terrestrial programme as a whole is managed directly by the Venture leader, Caroline Acton, for the Mexican projects.

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 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 Mexico.

Site manager – Marine site

The marine camp will have its own camp manger appointed by the venture leader prior to the field season. This camp manager has relevant previous experience in running field camps. The

programme as a whole is managed by the Venture leader, Caroline Acton, for the Mexican projects.

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 Mexico are overseen by Gerardo Orozco, who is an experienced PADI dive instructor and dive centre manager who has almost 25 years experience working and diving in Mexico.

Leadership during vehicle transfers
Bus transfers
The bus transfers will be organised through an organisation called VV Expeditions. They will ensure that all the vehicles used comply with Mexican regulations and are driven in a safe and careful manner. All their drivers have a minimum of 3 years' experience driving in Mexico. Seatbelts are available on every seat in the coaches and passengers will be advised to wear them.

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 3 year's driving experience and who will be given instruction on safe driving in Mexico, 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.

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 comprehensive 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 location in Mexico will have a qualified medic on site.

Emergency Procedures

A document describing the medical and evacuation procedures in full, for Mexico, is available on the health and safety pages of the Operation Wallacea website.

Carefully planned evacuation protocols are in place for the site in Mexico. 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.

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.

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 both in the forest and at the marine site. 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. DBS and other vetting service checks are included where applicable amongst other staff team members. 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.

Communications

The terrestrial sites have no mobile signal so each site is equipped with a radio system and satellite phones for emergency use. Students will always be accompanied by a staff member with a radio at all times whilst on surveys. The marine site at Akumal has mobile phone signal and staff members will be stationed at designated points at both the accommodation and dive centre in Akumal itself.

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 Mexico 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 Mexico are generally of good quality (tarmac rather than rock or dirt).

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 forest camp sites, and in dormitories at the marine site. 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. Each site has a lockable facility in which to store valuables if needed. 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.

Accommodation addresses;

Akumal marine site - Tortuga Escondida, Villas Akumal, Akumal, Quintana Roo, Mexico

Calakmul terrestrial site - Museo de Calakmul, Reserva de la Biosfera Calakmul, Xpujil, Campeche, Mexico

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 Mexico we are working with the

Biosphere Reserve Managemnet and ProNatura and offer training and knowledge exchanges with personnel from these departments. Furthermore, we are offering continued training and employment to local community members and development of tourism infrastructure as part of a joint programme with Pronatura.