



Education Authority Document Peru 2025

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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 Peru. 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).

2. Objectives and structure of the expedition

Objectives

The Operation Wallacea expeditions in Peru have two key objectives:

1. To train the expedition participants in Amazonian terrestrial ecology and Amazonian freshwater ecology
2. To gather data on the sustainability of forest and riparian resources used by the indigenous communities and provide information on the impacts of climate change and anthropogenic disturbance in the Amazon. Data will be collected on the various forest habitats and populations of birds, fishing bats, freshwater fish, terrestrial large mammals, river dolphins and herpetofauna.

Structure

Operation Wallacea is running a biodiversity research programme in conjunction with AmazonEco on the Lower Yarapa River in north-eastern Peru. AmazonEco provide the logistics and some of the survey staffing for the research programmes.

Students will spend 1 or 2-weeks in Peru. These expeditions are designed for multiple groups; so more than one school or college may be on the expedition. All volunteers and groups fly to Iquitos in Peru and usually stay in the Casa Morey hotel or another close hotel in Iquitos for the night before the expedition starts.

The volunteers are then transported by bus to Omaguas (approx. 2 hours) and then up river to the research site in the Lower Yarapa River, on various research boats operated by AmazonEco (usually approx. 1-2hours). On site the volunteers are based on the research ships and complete some boat-based surveys on smaller auxiliary boats and some transect-based surveys on land. During their time on site the students will participate in the Amazonian wildlife and conservation course and the surveys outlined above.



Figure 1: Map location of Iquitos, Nauta, Omaguas and the Lower Yarapa River survey site.

Start and finish of the expeditions

Please note the March school expeditions are subject to flexibility and therefore the arrival and departure dates may differ. Please contact your nearest Opwall Sales Representative to confirm specific dates.

Groups need to arrange international flights to arrive in Peru on the Saturday, before their first day of activities begins on the Sunday. Return flights can be arranged anytime on the Saturday after the final day of the expedition. 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 Peru 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 Peru, 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 Saturday and depart on a Saturday and as such their schedule will be as follows:

- Saturday: Land in Iquitos Airport, travel 30 minutes by coach to hotel in Iquitos.
- Sunday: Bus from Iquitos to Omaguas (approx. 2 hours) and board the research boats and travel to site.
- On site expedition days: Combination of daily surveys and Amazon ecology lectures.
- Friday: Travel on research boats from the research site to Omaguas.
- Friday evening: Bus from Omaguas to the hotels in Iquitos (approx. 2 hours).
- Saturday: Return flights from Iquitos Airport.

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 freshwater fish surveys), the boats and the places visited. 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 member 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 resource pack 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 school's booklet (downloaded from the Opwall website) containing full details of the facilities at each site, the learning outcomes for the expedition, and the planned itinerary. The school's booklet contains information on the aims of the surveys as well as a description of the methodologies that will be used.

Additionally, participants are given a kit list (which is also available on the Opwall website), some identification guides for the local fauna and flora and a language booklet with Spanish phrases. 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 Peru. Flights can be purchased by the teachers or by Operation Wallacea, depending on the school's requirements.

Once the groups are met in Peru 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 2024 venture leader was Emma Whalley. Emma has worked on the Operation Wallacea expeditions for the past two years. Prior to that, she was a Research Assistant on the Indonesian expedition in 2017.

The Venture Leader will ensure that 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.

The Venture Leader 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. The Venture Leader will also be responsible for ensuring the groups are met and given an initial briefing at their accommodation in Iquitos, so that they know what to expect for the following day.

Site manager

The Senior Scientist, Dr Richard Bodmer is responsible for the overall running of the boat-based expeditions and for the safety of the volunteers and staff working on the project. He has various staff assisting in different aspects of the project. Dr Bodmer has 25 years' research experience in the Amazon, has organised and/or led over 3000 students from universities and schools for the last 14 years in the Amazon. He has owned and operated research ships in the Peruvian Amazon for the last 20 years. It is the responsibility of the Expedition Co-ordinator to ensure that the correct level of leadership is provided for each of the groups and to check that the designated leaders have the requisite qualifications and/or experience. The project has a very high overall level of staffing with up to 30 staff at any one time running the surveys or providing logistical support for the expeditions. The AmazonEco office in Iquitos provides the admin back up to support the boat.

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/or 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 Peru.

Leadership during vehicle transfers

Bus transfers

The bus transfers will be organised through AmazonEco. Only reputable companies with an excellent safety record are used. AmazonEco will ensure that all the vehicles used comply with regulations and are driven in a safe and careful manner. A pre-departure vehicle check is carried out by the Peru staff, which includes checking fluid levels and tyres on each of the buses before they are allowed to depart with volunteers. An Operation Wallacea representative will be present on all transportations.

Research ships

There are sufficient life jackets and life boat spaces for all on board and in addition there are floatation aids and guard-rails along all sides of the ship.

Small boats used from the research ships

All volunteers and staff have to wear life jackets when using these boats.

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 participants have a comprehensive travel insurance policy which includes personal property, cancellation, curtailment and rearrangement cover as well as unlimited overseas medical and repatriation expenses. Operation Wallacea prepare detailed evacuation plans 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.

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 staffing

Operation Wallacea employ sufficient qualified medical staff including doctors, nurses and paramedics to provide the medical support at each of the field sites. All the medics are required to have completed their foundation training and have some experience in accident and emergency.

Medical facilities

A full medical kit is on the boat, 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 Peru, is available on the health and safety pages of the Operation Wallacea website.

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

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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, or 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 3 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 hotel and on the research ships. Accommodation for staff members and teachers accompanying the groups is also separate. Bathroom facilities are private. 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. 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 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 not comprehensive in Peru, and other than in Iquitos before and after the expedition start date there will be no/extremely limited mobile phone signal.

Each group of research ships have a UHF radio that can communicate with the co-ordinating office in Iquitos and there are standard radio check times twice a day. Each group of research ships also have a satellite phone that can be used in an emergency and is used for transmitting and receiving limited email messages daily. During periods of navigation the ship has to report its position daily to the Peruvian coastguard.

Groups leaving the research boat on either river or terrestrial surveys have to sign out and confirm their return time. For groups working on transects, there is a local runner with each of them who can reach the ship within 30 minutes in case of an emergency.

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 Peru 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 Peru 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 dormitories on the research ships. The safety and hygiene levels on the research ships 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 on the research ships 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.

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.

The model of conservation used by Operation Wallacea and AmazonEco is strongly rooted in principles of suitable economic growth in areas whose biodiversity is under threat. This means that huge efforts are made to ensure that conservation is tied with development of sustainable harvesting strategies. AmazonEco has been working in Peru for over 20 years now where they have been involved in bringing financial assistance to the Lower Yarapa region. Consequently, they have forged very strong links with indigenous communities who are very supportive of the projects. There will be regular activities to enable cultural exchange opportunities and promote the sharing of biodiversity knowledge and awareness.