

THE YOUNG EXPLORERS' TRUST

Registered Charity No. 1006211 Company limited by guarantee No. 2658616



PROCEDURE FOR CORPORATE EVALUATION (with BS 8848 Conformity)

Introduction

The Young Explorers' Trust was formed in 1972, when it took over the services offered to youth overseas expeditions by The Royal Geographical Society. Prime amongst these was the RGS Approval Scheme for youth expeditions overseas, together with Grant Aid for some expeditions. The YET Approval and Grant Aid Scheme has been in operation now for over 35 years, during which time almost 1500 overseas youth expeditions have had their plans screened by the Trust.

The Trust does not organise expeditions, but offers its skilled services to voluntary youth groups, to schools, to all Venture Providers (voluntary and commercial) of ventures outside the UK, to Scouts / Guides / cadet and other uniformed groups, and to all other groups involved in providing challenging and adventurous ventures outside the UK.

In 2007 with the publication of the British Standard BS 8848 – *a specification for the provision of visits, fieldwork, expeditions and adventurous activities outside the UK* – YET re-structured its approval in line with this standard to enable providers of such ventures to demonstrate conformity to BS 8848 through the YET approval scheme.

In 2009, the British Standard was revised and YET adjusted its procedures. Whilst continuing to evaluate individual ventures, YET introduced evaluation, on a corporate basis, to enable providers to demonstrate conformance with BS 8848. Although YET evaluates the administration and management systems of the Venture Provider, that Provider has to 'self assess' all ventures it provides and declare that they conform to BS 8848. The statement of "other party assessment" provided to successful applicant by YET is valid for 36 months; however annual reviews are conducted to validate conformity during this time. This corporate procedure is explained in more detail below. The evaluation of a single venture is described in a separate document "Procedure for Evaluation of a Venture Plan: BS 8848 Conformity".

The Trust's role is to examine, advise on, and approve (or otherwise) the conformity of a provider to BS8848. The Trust can accept no responsibility for the plans or outcome of any part of an individual "self assessed" venture.

The following notes relate to the Evaluation procedure for corporate conformity to BS 8848.

Definitions

For the purposes of the YET Evaluation Scheme the following terms and definitions apply:

Venture Provider	an individual or organisation having overall responsibility (as delegated to it by the Sponsoring Authority) for all aspects, of a venture. There can be only one Venture Provider for any one venture.
Third Party	any Provider of one or more contracted services to the Venture Provider
Venture Leader	the individual taking overall responsibility for all or a pre-determined period of a venture, and the nominated representative of the Venture Provider for this venture outside the UK.
Leadership Team	the team, including the Venture Leader, of leaders and activity specialists approved by the Venture Provider to deliver a venture.
Trainee Leader	a person learning the skills of leadership under the close supervision of an assigned member of the Leadership Team.
Participant	a person taking part in a venture, normally aged 14 to 25, but not a member of the Leadership Team nor a Trainee Leader.
Direct Supervision	supervision where a venture leader manages the participants during all or part of the venture with the ability to intervene in person immediately.
Indirect Supervision	supervision where a venture leader manages participants during all or part of the venture without the ability to intervene in person immediately.
RAMS	a system by which a venture is assessed and managed to ensure the safety and well-being of all members on a venture and which encompasses all aspects of the Risk Analysis and Safety Management process. <i>NB: "Risk Analysis" is also known as "Risk Assessment".</i>
Threat Analysis	a written analysis of any present threat in the destination country including security, political, health and natural hazards.
Home Agent	the Venture Provider's point of contact within the UK.
Stakeholder	a person with an interest in an overseas venture.
Competent person	someone who has the necessary and sufficient training, knowledge, experience, expertise and/or other qualities to complete their allotted task safely and effectively.
Personal Time	time during a venture when an activity is not being undertaken but participants remain under the supervision of the Leadership Team.
Down Time	period of time, occurring within the overall duration of a venture, identified by agreement between the venture provider and participant prior to the commitment to participation, as being beyond the jurisdiction of the venture provider. <i>NB: "Down Time" shall <u>not</u> occur on a venture with participants who are under 18.</i>

Evaluation criteria

The underlying principle is that the provision will be for ventures that take place outside the UK or home country of the venture provider.

The organisation wishing to claim conformity with BS 8848 for the ventures it provides (i.e. the Venture Provider) is responsible for all aspects, including safety, of ventures provided either on a voluntary basis or in return for payment. Responsibility for providing constituent elements may be delegated, i.e. third party provision, but accountability for ensuring conformance with BS 8848 remains with the Venture Provider.

YET anticipates that a provider shall be engaged in the supply of ventures that have the provision of personal development opportunities for the participants as their aim. This shall include, but not exclusively, "adventure tourism" and must have one or more specific objectives drawn from scientific fieldwork, physical challenge and adventure or, a community or environmental project.

YET has considerable experience in assessing the plans for the provision of ventures for people aged 14 to 25 but it will also evaluate conformity to BS 8848 for providers who operate with a wider age range.

Any Venture Provider may apply for YET Evaluation to demonstrate conformity with BS 8848. YET is able to advise any Venture Provider that seeks its help, but YET cannot be held responsible for that advice and whether, or not, it is followed in the provision of ventures.

Note: *It is a requirement of conformity that the Venture Provider possesses and operates to the current BS 8848 specification. Relevant staff shall have a working knowledge of the current BS 8848 specification and its application to their specific role.*

Operation of the Evaluation Scheme

1. The YET Board of Trustees shall appoint one of its number to act as Evaluations Liaison Trustee with responsibility to oversee all affairs relating to Evaluation and to liaise as necessary with the Evaluations Co-ordinator to provide guidance, advice and assistance.
2. The Council of The Young Explorers' Trust shall appoint an officer of the Trust as Evaluations Co-ordinator to manage all affairs relating to YET Evaluation, to co-ordinate the work of all involved, and to ensure that the Evaluations Liaison Trustee is at all times fully briefed on current matters relating to Evaluation.
3. The Venture Provider, seeking to demonstrate conformance to BS 8848, shall submit, electronically [evaluations@theyet.org] to the Evaluations Co-ordinator, an application form currently in the format of a workbook and sample venture data forms for YET selected sample venture(s). The workbook and form may be obtained by downloading from the website [www.theyet.org]. If this presents problems, then the Co-ordinator may be emailed for advice.
4. Applications should be submitted at soon as possible and not later than four weeks before the agreed date for the initial evaluation interview. [see "When to apply"]

Note: *YET encourages providers to register their intent to submit an application as early as possible to assist in arranging the schedule of interviews. YET fully acknowledges that it takes time to complete the application and to assemble the required documentation, but early notice will be of benefit to all concerned in arranging interview dates.*

5. The Evaluations Co-ordinator will carry out an initial assessment of the application and may forward the plans for comment to a selection of experienced and YET approved assessors. After further consideration the Evaluations Co-ordinator may request additional information and supportive documents from the Venture Provider in order to enable an Evaluation interview to proceed.

6. The Evaluation interview will be by a YET Evaluation Panel that shall comprise a Chairman, a secretary and at least one other member.
7. The Evaluations Liaison Trustee, or an agreed substitute, shall chair the Evaluation Panel. The secretary will be the Evaluations Co-ordinator, or his nominated substitute, who will be responsible for recording comments, suggestions, requirements and Panel decisions, and who will communicate such information to the Evaluations Co-ordinator and the Evaluations Liaison Trustee if either was not present at the interview.
8. The Evaluations Co-ordinator shall inform the Venture Provider of the names and background of the Panel members. Both YET and the Venture Provider must declare any known association of a Panel member with that Provider. If the Venture Provider requests that a named panel member is replaced a reason must be given.
9. The Panel will meet with the nominated representatives of the Venture Provider at a time, date and place as agreed. The Evaluations Co-ordinator will confirm the arrangements for the interview with the Venture Provider.

Note: It is unlikely that any interviews will be arranged for July, August or September.

10. It is the responsibility of the Evaluations Co-ordinator to recruit the Panel members. Panel members are drawn from competent persons who have offered their voluntary services to YET and who, between them, possess a wide knowledge of all aspects of ventures outside the UK, including organisation, management and leadership.
11. There are two main elements of the assessment:
 - An assessment of the providers business processes. This is conducted via an interview. The interview Panel will consider all aspects of the provision as detailed in the application workbook and supporting documents.
 - A test of the application of the business processes by reference to sample venture(s) independently selected by YET, as well as through dialogue with those representing the Venture Provider.
12. To demonstrate conformance with BS 8848, as evaluated by YET as an other party assessor (clause 29.3.3), the administration and management systems of the provider must be seen to be safe and appropriate to the needs and abilities of participants and within the competence and the experience of the Leadership Team for all ventures provided in accordance with BS 8848. The Panels may offer suggestions, where appropriate, even where conformity is awarded. It is not mandatory for suggestions to be followed by the venture provider.
13. The outcome of the evaluation will be one of the following:
 - **Conformance:** all aspects of the provision reach the required specification of BS 8848. Although the Panel may well make suggestions for possible ways to improve the participants' experience; it is not mandatory for the venture provider to follow these.
 - **Deferral:** one or more aspects of the venture provision may require additional evidence. When matters have been acted upon appropriately and the Evaluations Co-ordinator has been informed in writing, the evaluation will be upgraded to conformance after consultation and agreement with the relevant Panel Chairman and the Evaluations Liaison Trustee.
 - **Rejection:** the provision has shortfalls at the time of the interview which are considered by the Panel not to comply with BS 8848. Conformity can only be gained through a complete resubmission.
14. The Panel will not award conformance to a Venture Provider who is judged not to meet any one or more requirement of the specification BS 8848. In such a case the Venture Provider will be given the reasons for the decision and conformance will be either deferred or rejected.
15. The Panel may defer conformance where, in its view, further evidence is required. Evidence will need to be provided that the specific requirements are being met before conformity can be granted. In this instance, the authority for upgrading to conformance rests with the

Evaluations Liaison Trustee, in consultation with the relevant Panel Chairman and the Evaluations Co-ordinator and after consultation with members of the original interview panel.

16. The Panel may reject an application that, in its view, does not meet the BS 8848 criteria or is insufficiently developed to enable revision and adjustment (as advised) to then meet the required standard.
17. Payment of the evaluation fee for that year shall still apply in the case of deferment or rejection.
18. In all cases of rejection, no further consideration will be given to that application and if the provider wishes to proceed with YET approval of conformance then a new application must be made and a new fee paid.
19. Decisions: once the above process has been completed the Panel, through The Evaluations Co-ordinator, will submit their proposed decision to the Evaluations Liaison Trustee for confirmation. Only in exceptional circumstances will the proposal of the Panel be overruled.
20. Once the decision of the Panel is confirmed by the Evaluations Liaison Trustee, the Evaluations Co-ordinator will communicate that decision in writing (along with the Panel's report) to the Venture Provider. This is normally within a fortnight of the date of the Panel meeting. An "Other Party Declaration of Conformity" will be forwarded to the Provider and YET will display this information about the Venture provider on its web site.
21. Any reasons for deferral, rejection, or other failure to meet BS 8848 criteria will be conveyed in writing by the Evaluations Co-ordinator to the Venture Provider, normally within a fortnight of the date of the Panel interview.
22. Ultimately, the Council of The Young Explorers' Trust holds the right and responsibility of confirming or rejecting the decision of the Panel, as confirmed by the Evaluations Liaison Trustee, or against that decision should the Trustee over-ride the proposal of the Panel.
23. Should the Venture Provider wish to appeal against the decision as conveyed by the Evaluations Co-ordinator, then appeal may be made to the Chairman of The Young Explorers' Trust through the Evaluations Co-ordinator.
24. A copy of the outcome of the Evaluation interview, including any suggestions and requirements, given to the Venture Provider will be retained by the Evaluations Co-ordinator in YET records.

How to apply

1. Intention to apply for BS8848 conformity should be registered with the Evaluations Co-ordinator as soon as possible.

Note: *It is a requirement of conformity that the Venture Provider has a copy of the current BS 8848 specification.*

2. An application workbook and forms for the specific sample ventures can be downloaded from the YET website (www.theyet.org). The completed application, with any necessary attachments, should be returned by email to the Evaluations Co-ordinator [**evaluations@theyet.org**]. The workbook and form is in Word tabular format to allow further information to be inserted.
3. Please ensure that **all sections are completed** so as to avoid delay or rejection. Details may be updated, by email, at any time between the application and the interview, or with appropriate notification, and agreement with the Evaluations Co-ordinator, at the time of the interview. If an application is so short of detail that the evaluation process cannot commence, then the Venture Provider will be contacted to this effect by the Evaluations Co-ordinator.

When to apply

Venture Providers should apply as early as possible, and preferably after initial registration of the intent to apply. Opportunity to update plans will be given prior to, or at, the evaluation interview.

Providers are encouraged to register their intent to seek Evaluation as early as possible. A mutually convenient date will be agreed upon. Applications and documentation shall be received 4 weeks prior to the evaluation date.

Although it is possible for YET to accept later applications, this remains at the discretion of the Evaluations Co-ordinator in consultation with the Evaluations Liaison Trustee.

Application fee

The current fees are £600 in year one, and £300 in each subsequent year. The Evaluation Fee is normally spread over the three year period for which conformity normally applies, with a higher fee being applied in year one when the more detailed work and a larger Evaluation Panel is required. Venture Providers will be invoiced for the fee on an annual basis.

The current fee may be revised and will be shown on the YET web-site but please confirm with the Evaluations Co-ordinator the exact level of the fee applicable.

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