

PROCEDURE FOR EVALUATION OF INDIVIDUAL VENTURE PLANS (with BS 8848:2014 Conformity)

Introduction

The Young Explorers' Trust was formed in 1972, prime amongst its activities being the 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 individual overseas youth expeditions, and many more through corporate evaluations, 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 for young people.

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 to enable either the evaluation of individual ventures, or the assessment of providers on a corporate basis, for conformity to BS 8848. Under the latter, any Venture Provider has to 'self assess' all ventures it provides and declare that they do so conform to BS 8848. This corporate procedure is explained in more detail in a separate document "Corporate Evaluation procedure".

**The Trust can accept no responsibility
for the outcome of any part of an evaluated venture.
The Trust's sole role is to examine, advise on, and approve
(or otherwise) the plans of the venture.**

The following notes relate to the Evaluation procedure for the provision of a single venture

Definitions

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

Venture Provider	an individual or organization having overall responsibility (as delegated to it by the Sponsoring Authority) for all aspects, of the 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 the 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 the 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 the venture, 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 the 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 the 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 the expedition 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

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

Although YET is able to advise any Venture Provider that seeks its help, YET cannot give its Approval to every type of youth venture outside of the UK. In order to apply for YET Evaluation, the planned venture must meet the following criteria:

A British standard 8848

The Venture Provider shall confirm use of the current BS 8848 specification in completing the application and further confirm that the standard is understood and shall be adhered to by the Venture Provider (nominated role) and the Venture Leader in the execution of this specific venture.

B Aim and Objectives of the Venture

The overall aim of a venture shall be to provide personal development opportunities for the participants. Additionally the venture must have one or more specific objectives drawn from scientific fieldwork, physical challenge and adventure, or a community or environmental project.

The venture plans must demonstrate how these specific objectives tie into the overall objective of personal development. These objectives must be appropriate to the needs and capabilities of the young participants, once training has been completed, and within the competence and experience of the Leadership Team (*see note 1*).

C Type of Venture

1 Expeditions outside the UK: Ventures outside the UK where considerable self-reliance is required (*see Note 2*).

2 Other Ventures: These must be self-organised activities which take place outside the UK and which are designed to promote personal development through self-reliance.

D Safety

All matters of safety will be regarded by the Evaluation Panel as being of prime importance in the assessment of the expedition plans submitted for Approval (*see note 3*). A full Threat Analysis and Risk Analysis must be undertaken and be ongoing, and a written copy produced for scrutiny by the Panel.

Ventures must possess and provide a full Major Incident Plan which includes the necessary support from a Home Agent and which has been shared with all participants, the parents of under 18 participants, and other stakeholders.

F Leadership

The Venture Leader and Leadership Team (*see terms & definitions*) must be selected so that they possess appropriate technical competence, personal qualities and communication skills relevant to the nature of the venture and shall be assigned roles and responsibilities within their proven competence. At no time in the venture shall a Trainee Leader have sole responsibility for the direct supervision of participants. The Leadership Team must be of a sufficient size to ensure that all activities may be undertaken in safety. It is expected that the Venture provider will have made arrangements for all of the Leadership Team to have undergone appropriate background checks, which should include (where participants are under 18) Enhanced Disclosure from the Independent Safeguarding Authority (ISA).

G Age of participants

Normally the lower age limit is 14, with the majority of the party (excluding the Leadership Team) aged between 14 and 25 (*see Note 4*).

NOTES on Evaluation Criteria

1. YET Approval indicates that the venture has provided sufficient evidence to show that its plans meet the standards set by The Young Explorers' Trust and thereby conform with BS 8848. These plans must cover the safety of the participants, risk analysis and management systems (RAMS), major incident plan, communications plan, the competence and experience of the Leadership Team, in-country arrangements, insurance, environmental concerns, and the value of the venture to participants in terms of personal development through one or more of adventurous activities, fieldwork, community or environmental projects.
2. This implies that the venture is largely dependent on its own resources in respect of equipment, in its ability to cope with minor emergency situations, and in implementing the venture's programme through its Leadership Team.
3. YET publishes "*Environmental Responsibility for Expeditions*" (2nd. Edition 2002), various Good Practice Guidelines and offers further written advice in its Expedition Manual which are all downloadable, free, from the Publications page of the YET website (www.theyet.org). These guidelines are brought to the attention of all ventures applying for evaluation.

Operation of the Evaluation Scheme (See Flow Chart on Page 8)

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 the Evaluation of Venture Plans 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, either direct or through delegation to the Venture Leader, shall submit the plans on the application form "**YET Individual Venture Evaluation – Application Form**" to be returned electronically to the Evaluations Co-ordinator. [evaluations@theyet.org]. The form may be obtained by direct email request to the Evaluations Co-ordinator. If this presents problems, then the Evaluations Co-ordinator may be emailed for advice.
4. Applications should be submitted as soon as possible and not later than 21 days before the agreed date for the Evaluation interview.

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 YET approved assessors experienced in aspects of the plans, particularly for the region to be visited, the projects to be undertaken and the activities to be pursued.
6. An Evaluation Panel shall normally consist of at least two. It remains the right of YET to allow named observers to attend an Evaluation interview.
7. 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.
8. The Panel will meet with the Venture Provider and Venture Leader (who may be one and the same person), and other members of the expedition as deemed necessary by the Panel, at a time, date and place as agreed. The Evaluations Co-ordinator will confirm the arrangements for the interview with the Venture Provider and Venture Leader.

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

9. 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 youth ventures outside the UK, including leadership.
10. All Panel members undertake not to use information obtained in the course of evaluations for their own gain or the gain of other organizations, with which they are linked, and to respect the commercial interests of the organizations under evaluation.
11. At interview, the Panel will be concerned to determine if there are any 'major', or 'minor', nonconformities to BS 8848:2014. A major nonconformity would automatically require the Panel to determine that the venture had failed in its objective to achieve the required standard. Individual minor nonconformities would not lead, in themselves, to rejection by the Panel. However, were these to indicate a pattern of significant nonconformity in any area covered by BS 8848, or be too numerous to leave the Panel satisfied as to the reliable quality of the organization, rejection could result. The venture provider will be required to undertake corrective action regarding all minor nonconformities within timescales determined by the Panel.

12. The outcome of the evaluation will be one of the following decisions:
 - **Approval:** all aspects of the plans reach the required standard. Although the Panel may well give make observations for ways to improve the experience to be gained by the participants; it is not mandatory for the venture provider to follow this.
 - **Approval pending specified corrective actions:** most aspects of the plans reach the required standard, but there are some that require improvement and are capable of rapid correction. The Panel will give mandatory advice on changes to be made regarding such aspects.
 - **Rejection:** the plans have significant shortfalls at the time of the interview in that they are considered by the Panel to be unsafe or beyond the capabilities of the Leadership Team and / or the participants.
13. To gain YET Approval, the venture plans must be seen to be safe and appropriate to the needs and abilities of the participants and within the competence and the experience of the Leadership Team. The Panels may give mandatory advice and also make observations where considered appropriate, on the plans submitted, even where Approval is awarded. It is not mandatory for observations to be followed by a fully approved venture.
14. The Panel will not grant Approval to any venture for which plans do not meet the required YET standards. In these cases, the Venture Provider and the Venture Leader will be given the reasons for the decision.
15. In all cases of rejection, no further consideration will be given to that application. If the provider wishes to proceed with YET approval then a new application must be made.
16. Once the above assessment process has been completed, the Panel will submit the proposed decision to the Evaluations Liaison Trustee for confirmation. Only in exceptional circumstances will the proposal of the Panel be overruled.
17. After the decision of the Panel to grant Approval is confirmed by the Evaluations Liaison Trustee, the Evaluations Co-ordinator will communicate that decision in writing (along with the Panel's report on the venture plans) to the Venture Provider and the Venture Leader. This is normally within a fortnight of the date of the Panel meeting. An Approval Acceptance Form will be forwarded, and YET's Approval does not become valid until that signed, completed form has been returned to the Evaluations Co-ordinator, who will then issue an Approval Notice and an Approval logo image that may be used in Presentations.
18. Any reasons for rejection will be conveyed in writing by the Evaluations Co-ordinator to the Venture Provider and the Venture Leader, normally within a fortnight of the date of the Panel meeting.
19. The Council of The Young Explorers' Trust holds the ultimate right and responsibility of confirming, or rejecting, the Approval decision should there be any appeal (see #19 below) against the proposed decision of any Panel, as confirmed by the Evaluations Liaison Trustee, or against that decision should the Trustee over-ride the proposed decision of the Panel.
20. Should the Venture Provider wish to appeal against the evaluation 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.
21. A copy of any advice given to the Venture Leader and Venture Provider will be retained by the YET in its central archives.

Note: The preferred means of communication is by email with attachments: the receipt by the Evaluations Co-ordinator of an emailed acceptance as under section 18 above shall be taken as signed approval.

How to apply

1. Intention to apply for YET Approval and BS 8848 Conformity should be registered with the Evaluations Co-ordinator as soon as possible.
2. An application form “**YET Individual Venture Evaluation – Application Form**” can be obtained from the YET Evaluations Co-ordinator [evaluations@theyet.org] by direct request. The completed application form, with any necessary attachments, should be returned by email to the Evaluations Co-ordinator. The 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. It is appreciated that, at the time of application, complete details may not be available since planning and recruitment may still be in process. Details may be updated, by email, at any time between the application and the interview, or in extreme cases brought to the interview itself. 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 are encouraged to register their intent to seek Evaluation as early as possible. Venture Providers or Venture Leaders should apply as early as possible, certainly as soon as there is sufficient detail in the planning to hold a viable interview. Opportunity to update plans will be given prior to, or at, the Evaluation interview. Please note that YET would prefer to receive applications as early as possible once expedition plans are sufficiently advanced and, as this is a matter of judgment, YET may return applications for further completion if it feels that the information provided is insufficient for a viable evaluation process to progress.

Applications shall be made at least 21 days before the proposed date of interview.

It should be noted that it is unlikely that interviews will be held during the months of July, August and September.

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

There is an administration fee charged in respect of each venture for which plans are submitted for evaluation. Details of the current scales of fees “**YET Schedule of fees for Evaluations**” are provided on the YET web site. The fee is due regardless of whether or not the venture is approved by YET.

The YET Individual Venture Evaluation Scheme

