

# MINIMISING RISKS IN ADVENTURE TRAVEL



Penguin Watch, a University of Oxford research project, investigates the threats to Antarctic penguins, and explores the changing distribution patterns of penguins and species survival around the Southern Ocean. *Quality World (QW)* speaks to Dr Tom Hart, Penguinologist at University of Oxford's Department of Zoology, to find out how Penguin Watch's use of the voluntary standard BS 8848:2014 has helped to improve the project's expeditions



Working with collaborators around the world including Oceanites (a non-governmental organisation conducting scientific research in Antarctica), Stony Brook University (New York), and the Zoological Society of London (UK), Penguin Watch researches the threats to penguins and how to mitigate them. The project, run by the University of Oxford, is utilising long-term monitoring in the field and genetic analysis of penguin feathers to get a complete picture of how populations are changing globally. Penguin nesting colonies are photographically recorded at hourly intervals all year round, plus other information is collated for large-scale data analysis. The findings will be used to inform international policy and educate the public regarding the threats to Antarctica.

Leading the research project is Dr Tom Hart, Penguinologist at University of Oxford's Department of Zoology. In order to anticipate and minimise the risks for the project's expeditions, which take place across the Antarctic continent and the Falklands, South Georgia and the South Sandwich Islands, Dr Hart led the journey to conforming to BS 8848:2014 Specification for the provision of visits, fieldwork, expeditions, and adventurous activities outside the United Kingdom.

As a result of adopting this voluntary standard, Penguin Watch was nominated for and consequently won the BSI Standards Award in the 'Trust' category in 2019.

BSI said Penguin Watch's conformance to the standard inspired trust in all those engaged in the project.

QW speaks to Dr Tom Hart to find out how conforming to BS 8848:2014 has helped the project to develop internal procedures and processes, benchmark existing practices and verify overall conformity.

#### The mission

Hart says Penguin Watch's mission is to change the scale at which Antarctica is currently monitored. "Antarctica is a vast continent that's quite varied. The stereotype people have in mind is that it is a cold, white and windy place. Certainly, there are large tracks of that, but that's not all of it. The Sub Antarctic (a region in the southern hemisphere, located north of the Antarctic region) is very green and there are millions of penguins in this area."

To monitor these areas, Penguin Watch hitchhikes on tourist ships and chartered yachts. "As we're jumping on and off

"I want to continue to promote to the wider community that we are conforming to a responsible standard in tricky environments"



#### What is BS 8848:2014?

BS 8848:14 Specification for the provision of visits, fieldwork, expeditions, and adventurous activities outside the United Kingdom gives specifications to ensure effective operational systems are in place to assess and manage the risks associated with overseas adventures. The standard can be used by providers of any adventurous activities abroad, including adventure holidays, gap-year travel, volunteering projects, charity challenges, expeditions, field research, and educational visits.

Any UK organisation (eg, schools, charities or tour operators) planning an adventurous activity abroad, for individuals or groups, can use the standard and consider its requirements.

BS 8848:2014 details good practice for venture providers to ensure the safety and wellbeing of everyone taking part. It shows organisations how to plan ventures, identify potential risks and manage them effectively. It also requires participants to be given clear information so that they can make informed decisions about risks to their own safety. The standard covers all aspects – from planning, transport, staff and accommodation, to the activities themselves.

#### Did you know?

The number for the standard, 8848, was chosen because that is the height of Mount Everest in metres.



ships, we need to know and understand safety protocols," Hart said. "We want to get to about 200 sites per year and leave cameras to record all year round and take samples. Taking students out in a challenging environment requires us to know what to do when an accident occurs. We haven't had any accidents yet, but we wanted to know how our risk assessments compared to what is required by BS 8848."

The data collected on these expeditions is shared with Zooniverse, the world's largest platform for people-powered research. Penguin Watch ([penguinwatch.org](http://penguinwatch.org)) is just one of over 100 projects on the Zooniverse platform that helps researchers to engage with the wider public. Penguin Watch does this by posting blogs and pictures of penguins that the public can count.

#### Exploring new standards

Hart came across BS 8848:2014 during wilderness medical training, and then started the process when he met an auditor that was assessing Quark Expeditions, an expedition travel company and one of Penguin Watch's benefactors, against the standard. "I was talking to one of the independent auditors while they were in the middle of an audit. Following that

conversation, I felt like conforming to BS 8848 was something we should do," Hart said.

The Young Explorers' Trust (YET), which was formed in 1972 to provide safe and responsible expeditions for young people, assessed Penguin Watch for conformity to the BS 8848:2014 standard. YET auditors carry out an evaluation to ensure expeditions planned by UK-based organisations meet the requirements of BS 8848, the YET evaluation considers the planning of any venture. This means that all related procedures meet the expectations and requirements laid down in the standard. These include, but not exclusively, full details of:

- the aims and objectives of the venture;
- the quality of the venture in terms of personal development opportunities that may be achieved through proposed adventure and projects;
- pre-booking information;
- the selection of participants;
- the competence and experience of the leadership team;
- third party provision;
- the risk management system;
- crisis and incident management planning;

- insurance and finance arrangements; and
- environmental concerns.

Certification to the standard lasts for three years from the assessment date.

#### Journey to conformity

During the first year, following an audit by YET, Penguin Watch's main goal was to follow the checklist provided by BS 8848:2014. Following observations made by YET's assessor, there were some questions that Hart needed to answer, such as, "How do first-time team members raise concerns about health and safety on their first experience?"

Gaps identified during the first year of conforming to the standard were then addressed in the following year. "A good example of this," Hart said, "was reporting potential accidents to understand what we would do if an accident occurred. There was a lot of feedback and thoughts from YET on how we ensure excellence across the team and how we ensure people are meeting the training requirements."

Hart says conforming to the standard has involved various documents, including joining instructions and training notes, being changed beyond recognition. ▶



For example, everyone involved in an expedition is now interviewed and their experiences are captured. They are asked questions such as, "What did you feel prepared for? What didn't you feel prepared for?" They are also able to say what they liked and didn't like about the expedition.

Winning the BSI award, Hart said, has also given the project the confidence to be even more open about their processes. "We're now sharing our risk assessments and processes across polar communities, something we would have been nervous to do in the past, to help spread good practice and to gain feedback," Hart said.

Some of the challenges Penguin Watch faced when conforming to the standard included creating an electronic handbook for explorers, which acts as a training tool but also enables discussions and gives people the confidence before they embark on their adventure. "Their expectations need to be right, as does their training, and they need to feel prepared after reading this handbook," Hart said.

The electronic handbook takes explorers through the standard's requirements. It details the process involved for the medical screening before a person embarks on a trip, first aid training, and training for when they are on the ship. The joining instructions are also crucial. They tell people how to book their flights and where and when they are expected to join the ship. There are also links to YouTube videos that show what should be in a survival kit, for example, as each explorer is expected to pack their own.

#### Building trust

Conforming to the standard has helped Penguin Watch gain the trust and support of its stakeholders, which is crucial given the serious nature of the fieldwork environment.

Hart says the handbook has helped new participants by capturing feedback from those with one year or two years of experience. Hart said it also means he knows participants are prepared before they arrive at the location as well as going through training.

Hart says defining the training for team leaders has now been formalised to ensure a minimum standard. GDPR was also another issue that has improved as a result of conforming to BS 8848. "We were trying not to hold personal details, but the standard is insistent that we should for medical reasons. So, we had to determine what kind of data was appropriate to hold and what wasn't and how to secure data in the field," Hart explained.

Using the standard, Hart is also trying

to ensure that best practice in fieldwork safety is something that is looked at by the project's collaborators. For example, seeing if a collaborator has a bullying and harassment policy and if there is support for anyone wanting to end their trip earlier than planned. "One of the things that the audit by YET was good for, was forcing us to demonstrate how our collaborators are compliant with fieldwork safety," Hart says. "Although the first audit was nerve-racking, it ended up being a fun conversation where we bounced ideas around."

The third-year audit will be taking place soon and Hart said the goal is not just to improve on the previous two years but to spread the word about what Penguin Watch has achieved. "We've won the BSI award and we need to communicate this to our collaborators and get a wider peer review on our processes," Hart said.

#### Impact of coronavirus on Penguin Watch

"Like almost all researchers, we're currently in lockdown," Hart says. "Which paradoxically makes it harder to do our work on screening for emergent diseases in penguins. The good news is that we spend so much time in penguin poo that we are used to washing our hands for 20 seconds and not touching our faces.

"We are also pretty lucky in that so much of our work is online and over the next few months we'll be working our way through aerial survey data and the time-lapse camera monitoring imagery.

"We've also been using the online tools we've created and the lessons learned to help other projects. This month we'll be launching Seal Watch, and soon a project, which will monitor Polar Bears".

He concludes: "One of our biggest concerns is the funding. We rely a lot on engaging tourists and fundraising, so that is likely to be severely impacted this year because of the coronavirus outbreak (Covid-19)".



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Images: Penguin Watch



Dr Tom Hart at Orne Harbour on the Antarctic Peninsula.



that needed addressing immediately, such as putting together all the competencies needed for leadership and the wider team. This challenge was dealt with by providing evidence of leadership training and evidence of a leader's previous experience, such as which sites in Antarctica they had previously landed at, and whether they have experience of landings in the surf zone.

The project is also trying to gain accreditation from the Polar Tourism Guides Association, a new organisation that checks the skills, competency and measurement needs of polar tourism and expedition cruise operators, field staff and polar guides.

Looking into this accreditation brought

up questions about the project that hadn't previously been thought of. For example, how to manage remote supervision and disciplinary actions. "The University of Oxford was really good at helping in this area. They already have codes of conduct and processes in place. It was good just to look at the disciplinary action protocols before you even need to use them," Hart said.

Going forward, Hart said the penguin project will continue to conform to BS 8848 and enhance the training it provides to everyone involved. He added: "I want to continue to promote to the wider community that we are conforming to a responsible standard in tricky environments." ■