

## Expedition Planning Guidelines

### 1. Destination proposals

- Proposals for possible International and European Expedition destinations should be presented at the AGM in the November, approximately 18 months in advance of the expedition. This means there will be a destination proposal at every AGM.

### 2. Chief Leader selection

- Those putting themselves forward as Chief Leaders will be interviewed by office bearers or others appointed by the office bearers before being officially appointed by BEG as Chief Leader or Co-Chief Leaders.
- This interview panel must ensure that any Chief Leader/leaders have the appropriate experience, skills and knowledge to lead a successful and safe expedition that is in line with the aims of BEG.

### 3. Training Team formation

- The Training Team should consist of 3 or 4 BEG members with one person designated to take the role of Training Team leader.
- All BEG members should be asked for expressions of interest in a) being part of the Training Team or b) helping at Training Weekends. The Training Team should be selected by the Chair and Chief Leader with those responses in mind although other people can be approached to get a rounded balance of skills/experience within the Team. Those not selected will still be involved in the training process by helping at Training Weekends.
- Other experts can be co-opted as and when required.
- The roles and responsibilities between the Chief Leader and the Training Team must be clearly discussed and agreed from the outset. This may vary from expedition to expedition dependant on the experience of the leader team.
- Training Team members are expected to show a similar commitment to the expedition and attendance at Training Weekends as leaders on the expedition.

## CHIEF LEADER RESPONSIBILITIES

### 1. Publicity

- Publicise the expedition – further research your country, prepare as accurate a costing as possible and prepare a high quality presentation.
- Advertise for leaders, doctors and venturers – website, local press, radio and posters throughout the region.
- Plan dates and locations for presentations to support leader and doctor recruitment.
- Promote expedition in schools, Borders College, youth groups and work places.

2. Decide on the **size of leader and venturer team**. There should usually be two doctors or medical personnel (paramedic, nurse etc) as part of an International Expedition.

3. Add names to the BEG expedition **bank account**.

### 4. Leader Selection

- Set closing date for applications and set date and venue for leader and doctor selection. At this point, also establish corresponding dates for venturer recruitment.

- Leader application forms should be seen by Chief Leader and Training Team prior to the selection weekend.
- Plan format of leader selection weekend with Training Team.
- Selection weekend should be Friday evening to Sunday early afternoon. Allow time for robust discussion as to appointment of leaders.
- Selection weekend should aim to test a breadth of qualities and skills and challenge candidate physically and mentally to ensure they are suitable for the demands of the expedition.
- A formal interview should form part of the selection process. The questions should be the same for every participant and their responses recorded.
- Only candidates who are able to attend for 100% of the weekend should be eligible for selection. In the event of an expedition being at risk due to a lack of leader applications this rule can be relaxed and other options investigated by the Chief Leader but this must be done in discussion with the Committee.
- Discreet notes should be taken at selection by Training Team/helpers to better inform discussion afterwards.
- Chief Leader should take one or two days to reflect on decision before informing successful candidates. Candidates should be told when they are likely to know the outcome and how they will be contacted.
- Unsuccessful candidates should be contacted by telephone and given feedback as to why they were unsuccessful. All telephone calls to all applicants should be followed up by a letter. Use the template letter and signpost people to other organisations where they might get a similar experience.

## **NEXT STEPS FOR THE CHIEF LEADER/S AND THEIR TEAM**

### **1. Leader meetings**

- These should be a minimum of once a month, probably increasing in frequency as the expedition approaches.
- Meetings should be minuted, with the minutes being circulated to the whole leader team and the BEG Chair.
- At all leader meetings there should always be one Training Team member present to support and advise the leader team and liaise with the BEG Committee when appropriate.

### **2. Set date for **first leader team meeting** and arrange the following:**

- Identify team members to role/responsibilities of Treasurer, Travel Co-ordinator, Community Phase Co-ordinator, Environmental Phase Co-ordinator, Social Cultural Phase Co-ordinator, Adventure Phase Co-ordinator, Parent Liaison, Publicity & Website, Fundraising Co-ordinator, Safety Officer, Training Team link person.
- Arrange PVG for all leaders.
- Issue the BEG Leader Code of Conduct to all leaders and discuss it with them.

### **3. Publicity**

- Advertise recruitment of venturers via posters, radio, website, local press etc.
- Hold presentation evening/s for prospective venturers.
- Organise to speak at assemblies at the nine high schools in the Borders and visit Borders College.

### **4. Venturer Selection**

- Plan format of selection day with leaders and Training Team.
- The whole leader team should have read the venturer application forms prior to the selection weekend.
- Recruit BEG members to assist with running activities and selection of venturers.
- Agree recruitment criteria (this should be done on consultation with BEG Committee).
- Make sure everyone is briefed on the established scoring system. Refer to document.
- Decide on how venturers will be told if successful/unsuccessful. Use the template letter and signpost unsuccessful applicants to other organisations where they might get a similar experience.

## **5. Training**

- Set dates for Training Weekends and form a general overall plan for training (ie what needs to be covered and when) in consultation with the Training Team.
- Plan the first training day.

## **6. Commitment/Dropouts**

- The expectation of leaders and venturers is of 100% attendance at Training Weekends. This needs to be made clear from the outset. Chief Leader/s and the Training will discuss exceptional circumstances and a decision made about someone's continued involvement. It would be good practice for the Chief Leader to have also discussed this with the leader team.
- Venturers that drop-out can be replaced any time before the first full training weekend by a candidate who attended selection.
- If a leader drops out, the leader team can decide to offer the place to a member of the Training Team.

## **KEY ACTIONS THROUGHOUT THE YEAR**

1. Ensure every expedition participant is a paid up BEG member
2. Book flights
3. Arrange insurance (immediately after flights are booked)
4. Early medical history form – parent or guardian's signatures
5. Ensure all have current passports and check their validity (bearing in mind the requirements of some countries for it to be valid for a certain number of months after returning home). Make sure that those that need to update do so early.
6. Check passport names match the booking names
7. Contact Public Health for advice regarding the destination country
8. Early in the process inform the group on need for vaccinations
9. Alert the group to cost of vaccinations and any other possible hidden costs such as gifts to take out, Training Weekend £10, equipment
10. Add the treasurer of the expedition to the expedition account
11. Dates for group fundraising
12. Establish cluster groups and issue fundraising packs
13. Leaders only training events – carry out a training needs analyses of the team members
14. Investigate available Leader training courses
15. Offer First Aid/Life Saving courses
16. Plan parents evenings – one early and one closer to departure
17. Work out a payment schedule for all the team
18. Make a guidebook – a good exercise to get the team researching and learning about the destination

19. Appoint an advance party
20. Plan a calendar for the year, to include
  - 6 training weekends (2 or 3 for European expeditions)
  - 1 packing day
  - Group fundraisers
  - Report writing
  - Presentation afternoon or evening on return
21. Plan your calendar for the expedition
22. Risk assessments for Training Weekends and the entire expedition
23. Establish Golden Rules for the expedition
24. Establish contact in the country ie. Embassy /Consulate
25. Pull together ERG - team and folders. This is a big job and needs a lot of work. Start early!
26. Keep a record of all helpers/supporters etc to send postcards from the expedition or buy presents for.

## **POST EXPEDITION**

27. Write expedition report
28. Clean, return, buy and replace all BEG equipment
29. Finalise accounts
30. Return any additional fundraised funds to BEG, venturers/leaders or the community project, as agreed by team
31. Prepare presentation slides which can be used by group members to present expedition at parent's night, Rotary and other fund providers
32. Hold a presentation and invite all supporters

## **SUPPORTING DOCUMENTS**

**All of the above should be supported by the following documents which are available on the website**

1. Suggested Chief Leader interview questions
2. Template letter for unsuccessful leaders and venturers
3. Selection criteria for venturers
4. Leader Roles and Responsibilities document
5. BEG Leader Code of Conduct
6. Selection questions
7. Scenarios
8. Fundraising pack
9. Evacuation procedures