

1. Getting started

There are two ways to go on an Oxford University expedition: you can organize one yourself, or join one that someone else has started. Naturally, organizing one yourself gives you control over the location and the aims/objectives and how to achieve these: the trade-off, of course, is that you will end up doing a lot of the work! When joining someone else's expedition, you can still expect to shoulder a fair share of the preparation and fieldwork, but you don't have to jump through all the hoops of setting up the expedition in the first place. It should be added that, in many years, it is actually easier to organize an expedition yourself than it is to find an expedition that needs you particularly, unless you have specific special skills.

There isn't a 'best' way of going on an expedition: people with different temperaments prefer to lead expeditions, to help set up but not actually lead, or just to take part in and work hard on someone else's. That said, you should not be afraid of leading an expedition: most people who lead Oxford expeditions have never been in charge of such an undertaking before, or have even done anything similar, and may well never do so again. You don't need to be a special sort of person to organize and lead an expedition: you just need to have a clear idea of the sort of thing you want your expedition to do, and to be open to advice and to changing the focus and the methods as appropriate and necessary.

So, if you want to lead an expedition somewhere, the two most important questions you need to start by answering are: 'What do I want to do?' and 'Where do I want to do it?' – if you are not sure about either of these, look through expedition reports held by the club (contact the Archivist, Philomena Gan, yuqian.gan@univ.ox.ac.uk) and/or the [RGS expedition database](#) to get an idea of what sorts of project are achievable and interesting. You could also talk to people at club meetings. Often people discover research opportunities from potential dissertation/project supervisors that would make great University expeditions as well as being excellent academically. Note that it is not necessary to carry out a research project on a university expedition: however, it does need to have a specific purpose (defined by clear objectives) that would have some useful outcome, ideally.

Once you are clear about where you want to go and what you want to achieve, you can start thinking about planning your expedition. To start with, having a clear idea of what questions you need to answer in order to get your expedition off the ground is more important than having all the answers. Some of the things you should think about are listed below: all of these can be addressed, and the necessary skills acquired in time, providing you start thinking about them at an early stage.

Aims: What do you want to achieve? Generally, expeditions are scientific, adventurous or documentary based. Concise aims backed up by comprehensive objectives gives potential supporters confidence that you know what you are doing.

Location: Country, localities, habitat(s), language(s)? Good maps are vital!

Dates: Expeditions generally are at least 5 weeks long, but the Expedition Council are prepared to consider shorter durations, particularly if 5 weeks will preclude expedition team members from taking part due to other commitments. Which time of year would be most appropriate for your expedition?

Advisors: Are there any Oxford-based experts on your subject and/or location(s) of interest, who can advise about your plans? Can you establish local contacts who can offer further advice?

Team: Bigger groups are harder to manage and cost more, but you can get more done. What experience/background will your team members need? Are you confident that each provisional team member has the personality to cope with an expedition? Who will have the rights to any publishable outcomes (data, media etc.) from the expedition? Remember that at least half of your team needs to be Oxford students; you can advertise for members through the club's mailing list and social media pages e.g. our Facebook page.

Travel: Flights are generally cheaper the earlier you book them (for a complicated itinerary). How can you get to the location once in country, and how long might it take? What transport is required during the expedition?

Logistics: Obviously things such as accommodation, food, equipment (including shipping), internal travel etc. need to be fully considered and planned in advance as much as is feasible. Spend time thinking through how the logistics can be modified in response to all possible scenarios.

Medical: Expeditions are only successful if all members return safely! You must fully consider vaccinations, first-aid kits, first-aid training and emergency planning: such preparations will be scrutinized as part of the university approval procedure.

Insurance: Ensure it is adequate for your activities and the remoteness of the location. In most cases, the university insurance is sufficient (and recommended), although it is not without its limitations.

Partnerships with the host country: Are you going to collaborate with a host institution? Do you want local students to work with you? Can your local contacts provide support with preparations/logistics? Local collaboration will make the project more beneficial for the local community and increase the likelihood of obtaining grants.

Ethics: Are any ethical considerations required for your plans? If so, a separate university assessment is necessary.

Permissions: Visas? Permits for working, sampling, sample export/import? Permissions from landowners/local community leaders?

Funding: What is your approximate budget? Most expeditions cost at least £10,000. Grant applications, company sponsorship and fundraising events are normal funding sources. Some significant grant deadlines are as early as around the end of Michaelmas term, so start your research early!

Remember that some planning steps (e.g. applying for permits) may have to be completed by fixed deadlines some time in advance, so early assessment of these deadlines and the time each preparation step should take is critical. Remember that things invariably take longer than expected!

For an expedition to be approved and/or supported by the University (which brings various benefits), it needs to go through the approval procedure in Michaelmas term of the calendar year before you want to be in the field (or, in exceptional cases, two calendar years before). If you are approved, it is then just a question of raising the money, going on courses, sorting out the paperwork, and before you know it, you will be heading out!

2. Acquiring university approval

[Expeditions Council webpage](#) (includes rules and most of the mandatory forms)

2.1 Overview

In order to apply for university approval and/or funding from OUEC for your expedition, you must submit an expedition proposal for consideration by the University Expeditions Council, a special committee of experienced academics. If your proposal is reasonable and complies with the Council's rules, you and your team will be interviewed by the Council in order to clarify any details and ensure that you will have a good understanding of what you propose to do and are likely to be able to do it. After this interview, decisions on whether or not to award a grant will be made, subject to various conditions. The conditions include agreeing to be bound by the university's rules for expeditions (provided on the [Expeditions Council webpage](#)). Approval gives you the right to refer to your expedition as the 'Oxford University Expedition to...' which is advantageous in applying for funds from other organisations, establishing collaborations etc.

The basic requirements for approval are:

- (i) At least half of your team are current members of the university, and that all these members are life members of OUEC;
- (ii) The aims are worthwhile and the planning is such that it is likely that these aims will be met;
- (iii) Adequate safety precautions and medical provision have been demonstrated;
- (iv) The proposed duration of the expedition in the field is at least five weeks (although currently the Council are prepared to overlook this);
- (v) A member of the Congregation is appointed as Home Agent, and that a contact in the country you are to visit is appointed as a Field Agent (to act as a point of contact);
- (vi) Any involvement of local participants follows ethical best practice approved by the Central University Research Ethics Committee (CUREC).

The Expeditions Council meets to decide on proposed expeditions in November of each year. To get an expedition approved, you need to produce a proposal, and hand 14 copies of it to Hannah Donohoe (studyabroad@admin.ox.ac.uk), Secretary of the Expeditions Council, at the Examination Schools before the deadline. The deadline is normally at the end of the 5th week of Michaelmas term each year. You are welcome to submit a draft copy to the club's expeditions advisor before the deadline for suggestions on how to improve your proposal.

All Oxford-based members of your proposed expedition will be interviewed together at some point towards the end of the Michaelmas term. You will be asked questions about your proposal, to clarify anything that might have been unclear and so that the Expeditions Council can satisfy itself that your plans are safe, practicable and worthwhile.

If your expedition is approved (most are, though sometimes they may ask you to make changes), all team members need to receive adequate first-aid training, with the medical offer taking a more advanced course in wilderness medicine. You'll also need to arrange a medical consultation with the University Occupational Health Service, to discuss vaccines, malarial prophylaxis, and other potential health

hazards, depending on which part of the world you are going to. To satisfy the university that you've had all that training, you need to complete a form (on the Council's webpage), which must be countersigned by the University Occupational Health Service and the club's medical officer, Dr Tariq Qureshi.

Because expeditions are expensive, and the Expeditions Council likes to fund them generously, it takes back any remaining money from the bank account of successful expeditions six months after they have returned. When you get approval, you'll get a form that the expedition leader and treasurer need to sign and return.

2.2 Writing an expedition proposal

In short, your expedition proposal should explain where you want to go, what you want to do, why you want to do it and why it is important, how you're going to do it, who you are, how you are going to raise the money and spend it, when you'll be going, and how you will make sure you take care of yourselves.

An acceptable format for expedition proposals is set out and explained below. Do take care that the document you produce is called 'Proposed expedition to...' NOT 'University of Oxford expedition to...' it is up to the Expedition Council to decide if you will be an official university expedition!

Abstract

A brief, 100-200 word summary of where you plan to go, what research you plan to do, and when you plan to go there.

Contents

A list of where you find everything else in your proposal.

Aims

You should give a brief, clear statement of the aim(s) of your proposed expedition. If you want to do multiple things, then you should make it clear which of your objectives are more important. You should also briefly give justifications for your objectives, ie state why what you want to do is important/useful. For example, if you wanted to work on bat ecology in the Marianas Islands, you would need to explain why bats play an important role, why they have been understudied with respect to whatever you intend to study about them, why bat ecology is important to our understanding of the Marianas Islands, and why various organizations might be interested in your findings.

Background

You should give a brief background to the research you plan to do, including reference to previous work and expeditions in the area(s) you intend to work. As much as anything else, this section is to show the Expeditions Council that you know what you are talking about! It should include clear maps of where you are going: the Bodleian Map Room may be able to help you obtain relevant maps. Ensure that it is safe to go where you want to go: the University is very unlikely to approve proposed expeditions to countries or parts of countries that the Foreign and Commonwealth Office deems unsafe for British nationals: check [this website](#) for the latest travel advice.

Scientific Methods

This section is very important: most expeditions that have trouble getting approved have issues with this aspect of their plans. The best general advice is to talk to people who have done the sort of research that you plan to do, and to read scientific papers on the research topic. You should show that you understand and can explain the methodology, and that it is practicable for a group of students to carry it out in the time that you have. If you lack relevant experience, this needn't be a problem as training courses are often available, but you should make it clear how you will acquire the necessary skills in your proposal. Regardless of your level of prior experience, you should also make it clear in your proposal that you have consulted people within the university and elsewhere (including in the country you intend to visit, if possible) who have expertise in the relevant field and/or are familiar with the regions/locations you will be working in. If your work will require research permits, special visas, collection permits, or CITES export and import permits, you should make this clear, and demonstrate that you know whom you should contact.

If there is no way you could acquire the necessary skills in time, then you need to think hard about whether your research will actually be possible. One way that it might be possible is by working with local scientists and students, but that may involve additional complications.

Timing

You should be clear about when your expedition will be: the dates need not be fixed in stone, but do give approximate dates representative of the expedition duration. It's worth noting that flights are often booked up months in advance, and that the earlier you book complicated itineraries, the cheaper they are likely to be. Ensure you know, and have thought about, what season it will be where you are going. For example, in the southwest Pacific, most plants flower in the rainy season (November to March), but at that time of year the roads are often impassable, mosquitoes are everywhere, and cyclones are common. Will it be safe to travel and work at the time you are going? A good source of information on climate and natural hazards is the [CIA World Factbook](#), which has all manner of information on every country and territory in the world; many guidebooks usually also provide this sort of information.

You should provide a rough itinerary for your proposed expedition: the precise dates can change, but you should show that you have thought about issues such as the amount of time you will need to spend in cities at the beginning and end, and how much of your time you will actually be spending in the field. It is recommended that you should spend at least five weeks actually in the field; however, this is a recommendation and the Council is prepared (as of 2014) to consider expeditions that are shorter than this. However, please bear in mind that some grant funding bodies may be reluctant to consider eligibility if the expedition is shorter than five weeks in duration.

Personnel

You need to explain who you are – this has three components: how many of you there are, who's doing what, and how you are qualified to do it. Typical expeditions comprise three to six people. Expeditions containing only two people are usually encouraged to expand; solo expeditions are rarely approved, and larger expeditions can find it difficult to raise all the funds that they need. Many expeditions have not finished assembling their team when they apply for approval, but this isn't a big

problem: simply explain that you're still looking for someone to fulfill certain requirements.

The university requires that there be only one leader, and that there also be a treasurer and medical officer. The expedition leader has particular responsibilities to the university for the administration and responsible conduct of the expedition, and is ultimately responsible for everything done in the name of the expedition. The treasurer should ideally be somebody who can count, but there are no other necessary qualifications. The Medical Officer needn't have prior medical knowledge but should be prepared to go on a wilderness medical training course to familiarize themselves with the basics of expedition medicine and first aid. Depending on the nature of the expedition, you may want to appoint other expedition members to particular roles: photographer, site manager, driver, technical expert and translator are all relatively common.

This section should include a brief statement of who each person is and what relevant experience they have. It's usually enough to put something like that below for each member of the expedition:

It's usually a good idea to have someone on the expedition with previous experience of developing countries, if you will be visiting one, and also at least one person who speaks the local language reasonably well. If you get University approval, you can sometimes get on to language courses at the University Language Centre as a priority case. If you've never left the UK but have spent every summer for the past three years hiking for a fortnight across Scotland and sleeping in a tent in the middle of nowhere, mention it: such experiences are far more relevant to an expedition to somewhere remote than gap-year knowledge of the world centred on tropical beach resorts, for example. You should explain why your proposed project would be well suited to being carried out by your team, and why it's a good use of the workforce that your expedition represents.

Expeditions need to appoint a Home Agent and a Field Agent. The Home Agent must be a member of Congregation (the body comprising all of the university's permanent academic staff and senior administrators, but not postdocs or other research staff here on short contracts): the University publishes an annual register of the membership of Congregation in the University Gazette. The Field Agent should be a local contact.

Budget

Your budget should consist of an itemized list of expenditure, covering everything from administration costs (the price of printing multiple copies of your proposal, and stamps and envelopes for grant applications, soon adds up) to airfares, internal travel expenses, living costs (per person per day; these can usually be estimated from guidebook figures by reducing them to reflect the fact that most of the time you will not be staying in a hotel, and economies of scale that come from cooking for multiple people), shipping, permits, travel insurance, training courses, and the mandatory £200 contribution to publishing the OUEC bulletin.

A typical budget might look something like the table below (the numbers are made up but not implausible):

BREAKDOWN OF	CALCULATION	COST
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EXPENSES		
Airfares, London-Brasilia for 4 people: Car hire for 7 weeks	£800 x 4	£3200
Tent, sleeping bags, mosquito net, etc.	£100 x 7	£700
Equipment: camera, tree-ring painting liquid, Madalski presses, herbarium flimsies and drying paper, clinometer, laptop batteries etc.		£500
Living costs (food, accommodation, water, tent-space hire when appropriate, petrol) calculated at c. £12/person/day	£12 x 4 x 7	£336
Medical kit, including mosquito repellent, plus first aid training	£200 + £300	£500
Travel insurance (University scheme, 2 month period cover per person, plus expedition equipment cover to £2500)	£35 x 4, + £15	£155
OUEC bulletin publication costs		£200
Pre-expedition administration and fund-raising		£150
Post-expedition administration, including circulation of detailed reports to sponsors		£350
Herbarium specimen packing and shipping costs back to UK		£120
	Subtotal	£6611
Contingency funding	10% of subtotal	£661
GRAND TOTAL		£7272

There are a few things to note here. First, be as precise as you can, and make it clear how you arrived at your figures (whom did you get the airfare quote from? Whence does your estimate of car hire cost come?). Secondly, there are a couple of items that need to be included. The first is the OUEC expedition bulletin publication costs: the OUEC bulletin is produced periodically to publish the scientific results of expeditions and ensure they reach a wide audience; it is mandatory to contribute £200 to it and to account for this in your budget. The second is the requirement for contingency funding: usually this should be set at 10% of envisaged spending, or 15% when the projected expenses are less well constrained. This is to cover you in the event that something unexpected happens, and something unexpected frequently does happen! Note that you will not get approval unless both the OUEC bulletin costs and adequate provision for contingencies is included in your budget.

Proposed sources of income

You should outline how you hope to raise enough funds to cover your projected expenses. The Council only has a fund for anthropological, geographical/geological, and biological expeditions; the amount awarded from which is a function of how the stock market did last year and how many expeditions are eligible for an award in that year. In any case, a grant from this fund will not cover all your costs, so you will have to apply to charities, companies and learned societies for money and/or services in kind. Be realistic about the size of the grants you will receive: for example, the RGS are unlikely to give you the maximum grant. As a minimum, the Expeditions Council will expect you and your team members to contribute towards the expedition the amount you would spend in living costs for an equivalent period of time spent in Oxford: they are not interested in subsidizing you personally! Personal contributions are normally in the order of £100 per week per person; that's not including any travel bursaries that your college may be able to grant to you, which should be additional to that figure. Expeditions in need of cash organize parties, musical events, even raffles and slave auctions: ask OUEC committee members what has been successful recently.

Logistics

Logistics are what usually end up giving expedition leaders headaches. You need to think about transport, visas, passports and working conditions. How are you getting to your expedition location? How much does it cost to hire a car? How reliable are local vehicles? How good are the roads? If you can avoid driving, do so: ideally hire a driver if you really must have your own transport (the Expeditions Council now tends not to let students drive themselves overseas). You'll need to ensure everyone has at least 6 months of passport validity left at the end of your stay: some countries may refuse you entry otherwise. Find out at an early stage whether you need visas for the length of time you are planning to stay, and set about getting them. If your flight stops off anywhere, check whether or not you need a visa for the stop-off country. If there are separate tourist visas and research visas, make sure you get a research visa: doing things by the book all the way through minimizes the chance of things going horribly wrong. If you'll be working with scientists or students from your host country, do you speak their language? Do they speak your language? All these may seem far too many things to be concerned with at such an early stage, but the important thing is to start thinking about the questions, rather than necessarily to have all the answers.

Health and Safety

Health and safety has become an increasingly important part of expedition planning. At the proposal stage, you should demonstrate that you have properly thought about the issues. What diseases might you encounter? Is prophylaxis available? What is the cure if you get infected? If you are doing anything remotely dangerous (including diving and driving), have you been trained? What will you do if someone falls over and breaks a leg? If you will be somewhere very remote, what will your procedure for getting injured people to hospital be? Will you take a satellite phone, and/or emergency beacon? Make it clear that you will be talking to the University Occupational Health Service to get up-to-date professional advice. A detailed risk assessment and crisis management plan are essential components of your proposal; detailed advice about preparing these is provided in the [RGS Expedition Handbook](#).

References/acknowledgments

Finally, you should include a bibliography with references for all the books and articles you have used in preparing your report, and you should acknowledge any help you have received or advice you have been given which you have acted upon.

3. Safety

Expedition safety is a critical aspect of planning an expedition, which must be considered well in advance. University expeditions MUST do the following, or approval will be withdrawn:

- Appoint a medical officer, responsible for the team's medical arrangements
- Visit the [travel clinic at the University Occupational Health Service](#) to receive medical advice, and follow their recommendations for vaccinations and prophylaxis.
- Receive adequate first-aid training (typically advanced/expedition medicine training for one or two team members, and standard first-aid for all others).
- Take appropriate medical kit(s).
- Take out [University insurance cover](#), or appropriate private insurance.
- Satisfy the club's medical officer, Dr Tariq Qureshi, tariq@wildernessmedicaltraining.co.uk (and so the Expeditions Council) that you have met the above requirements.

Details of these rules and the mandatory forms can be found on the webpage of the [Expedition Council](#).

3.1 Expedition medicine

Expedition medical officers need not have any specific background in medicine; however, some experience may be useful. The [Osler-Green/Oxford Wilderness Medical Society \(Facebook group\)](#) may be able to help you find suitable experienced candidates. As well as seeing that the team are adequately informed, trained and equipped medically, the medical officer is responsible for camp hygiene, guidelines on which can be found in most expedition planning and wilderness medicine guides.

All members of the expedition must have some up-to-date first aid training (within the last three years) and be able to provide proof of this (typically in the form of a certificate from the training provider). Additionally, normally at least two team members are expected to receive more advanced training, such as the [Wilderness Medical Training 'Far from Help' course](#): it is strongly recommended that you discuss the suitability of proposed training courses with the club's medical officer, Dr Tariq Qureshi beforehand, to ensure that it will satisfy the requirements of the Expeditions Council.

It is vital that expert advice is sought as soon as you know your destination. It is mandatory to consult the [travel clinic](#) at the University Occupational Health Service: they will need to know where you are going (including how far from medical assistance you will be), when (and for how long), and what you'll be doing there. Resources such as the [Oxford Handbook of Expedition and Wilderness Medicine \(online version\)](#) may also be useful.

Some vaccinations need several doses over the space of a few weeks, so these need to be arranged (e.g. with the University travel clinic) in plenty of time. You will need to budget for these, as they can be expensive.

The requirements of a medical kit depend upon the size and skills of your team, and the duration, location and activities of your expedition. You should consult the travel clinic and/or the club's medical officer (Dr Tariq Qureshi) to discuss kit contents; we recommend [Nomad Travel](#) for kit provision, along with [Racing the Planet](#) (10% discount as OUEC members) as well as [Cotswold Outdoor](#) (15% discount as OUEC members, ask the Secretary (secretary.ouec@gmail.com) for the discount code). Personal medicines should be obtained from a GP.

3.2 Insuring your expedition

If approved by the Expeditions Council, members on an Oxford University Expedition are eligible to be covered by the University of Oxford's travel insurance policy for the duration of the trip. Cover is reasonably priced, and offers substantial benefits in the event of claims such as medical emergencies, cancellation, loss/damage to baggage, and death or injury. A 24-hour emergency helpline is also available for use by those covered, in the event of a serious situation arising. The policy can be tailored (to a certain extent) to your expedition, in order to make sure that the cover is adequate: details are provided on the website of the [University Insurance Office](#), whom you should definitely contact if you: 1) have any especially expensive equipment (be it personal or expedition property), 2) have any team members with pre-existing medical conditions, and/or 3) plan to visit a place regarded by the UK Foreign and Commonwealth office as dangerous in any way.

When you are in the field, if anything does go wrong, then as well as ringing the Insurers' emergency telephone number (+44 (0)20 7173 7797), you should also inform the University Security Service (+44 (0) 1865 289 999) and your home contact (if possible).

4. Training

If you want your expedition to be a success, you need to ensure that you know what you're doing! There are plenty of courses around that may help, so search for and make use of them. The RGS (Geography Outdoors) offer a variety of seminars/workshops, advertised on their [workshops webpage](#). The precise list varies from year to year, and some workshops can be booked up very quickly, so if you are interested, do book ASAP. The RGS's annual expedition/fieldwork planning and training event, [Explore](#), is an invaluable weekend of lectures and workshops given by some very experienced and high-profile explorers, and a great opportunity to network with fellow explorers of all experience levels.

5. Funding

There are many organizations that may provide funding for overseas exploration. The majority can be divided into the following categories:

- Companies who provide grants for some types of expedition (e.g. conservation work) as part of their corporate social responsibility schemes, e.g. large oil companies

- Companies who might be able to provide goods in kind, e.g. airlines and shipping companies
- Companies who are interested in commercializing what you might find, e.g. bioprospecting and mining companies
- Charities for whom funding overseas exploration is a principal aim, e.g. the [RGS](#)
- Educational charities who fund expeditions as part of their remit to further education, e.g. the [Gilchrist Educational Trust](#)
- Scientific charities who fund overseas exploration by students to encourage people in their field of scientific enquiry, e.g. the [British Ecological Society](#)
- Conservation charities who fund research which will benefit conservation knowledge of habitats, ecosystems or species, e.g. the [People's Trust for Endangered Species](#)
- Local charities, and sometimes local authorities, who help people from your area of the UK (or wherever) to travel overseas for worthwhile purposes, e.g. the Doris Field Charitable Trust for people from Oxfordshire
- Funding bodies set up to promote the study of a particular area, e.g. the Trapnell Fund of Oxford University, which funds fieldwork in Africa and Madagascar
- Funding bodies that work to support particular groups within society, e.g. the French Huguenot Charitable Trust of London (for Huguenots) or the Henrietta Hutton Fund (for young women at Oxford – Henrietta Hutton was a co-founder of the Oxford University Women's Exploration Club before it was merged in the 1960s).
- Funding bodies set up as a memorial to someone, which usually have specific eligibility criteria e.g. the Jeremy Willson Charitable Trust

The best starting point to search for these is the RGS, specifically the [section of their expedition handbook on finance and fund-raising](#), and [directory of grant-giving organizations](#).

There are various grants within the university that you may be eligible for:

- JCR/college travel awards (usually administered by the academic office of your college)
- Department fieldwork/research grants (ask one closest to what you intend to study)
- University level grants: [Fees, funding, and scholarships search facility](#), [Travel/study abroad grants](#)