HUMANITARIAN ACADEMY · HUMANITAIRES JOBS

Preparing a field mission: analyse, plan, travel and return safely

Complete manual

2-day certified course: clarify the terms of reference, analyse the context and the actors, assess risks with a scored matrix, prepare your health, documents, logistics, communications and budget, plan every movement, respond to an incident, work with communities and authorities, then complete the debriefing and the mission report. Advanced quantitative case studies, simulations, a final assessment and a verifiable certificate.

https://humanitairejobs.org/en/academy/preparer-mission-terrain/

Free document from the Humanitarian Academy. It may be printed and shared freely for training purposes, without modification.

Contents

1. Day 1 : Before departure: analyse, assess risks, prepare
2. Day 2 : In the field: travel, respond, work and return

Day 1 : Before departure: analyse, assess risks, prepare

Objectives

- Turn terms of reference into a realistic mission plan.
- Analyse the context and assess risks with a probability × impact matrix.
- Prepare your health, documents, logistics, communications and the mission budget.

From terms of reference to mission plan

A field mission starts at the office. The **terms of reference** (ToR) say why you are going: needs assessment, activity monitoring, team supervision, project launch, audit, emergency response. Before accepting, check five points:

- **The objective and deliverables**: what must be in hand on return (report, data, decision, plan), and for whom?
- **The scope**: which locations, which activities, which counterparts; what is not requested.
- **The real duration**: actual working days, once travel, permits and public holidays are deducted.
- **The resources**: vehicles, interpreters, budget, access to data, support from the local office.
- **The responsibilities**: who supervises you on site, who makes security decisions, whom you report to.

The **mission plan** turns the ToR into a day-by-day schedule, with meetings, movements, overnight stays, contact points and a margin for the unexpected. A simple rule: allow at least **20% buffer time** in hard-to-reach areas, because a roadblock, rain or a delayed permit is enough to lose a day.

> Vague ToR produce long missions and useless reports. If the objective takes more than two sentences, have it reworded before you leave.

Analysing the context and the actors

Before leaving, build a clear picture of the area. Public sources are often enough to start with: OCHA situation reports and maps, ReliefWeb, cluster bulletins, NGO forum analyses, local press, annual reports of the organisations present. Complete this with the **country office briefing** and colleagues returning from the area.

The analysis answers a few questions:

- **Situation**: what has happened over the last six months (displacement, fighting, epidemics, disasters) and what is changing right now?

- **Actors**: formal and customary authorities, security forces, armed groups, community leaders, other organisations; who can facilitate or block your work, and how is your organisation perceived?
- **Access**: passable roads, season, required permits, checkpoints, curfew.
- **Security trends**: types of recent incidents, locations, times, targets; an isolated incident and a series do not call for the same response.

This analysis is not an academic exercise: it is used to decide on the route, the team profile, the messages to convey and the security measures.

Assessing risks: the probability × impact matrix

Humanitarian security management rests on a simple approach: **identify the threats**, estimate the team's **vulnerability** to each one, deduce the **risk**, then choose measures. Each threat is often scored on two scales from 1 to 5:

- **Probability**: 1 very unlikely, 2 unlikely, 3 possible, 4 likely, 5 almost certain.
- **Impact**: 1 negligible, 2 minor, 3 moderate, 4 severe, 5 critical (death, kidnapping, programme suspension).

Risk = probability × impact, from 1 to 25. A common grid: 1 to 5 **low**, 6 to 12 **medium**, 15 to 25 **high**.

Threat	Probability	Impact	Risk
Road accident	4	4	16: high
Armed robbery on the road	3	4	12: medium
Malaria	3	3	9: medium
Kidnapping	1	5	5: low

For each medium or high risk, plan **measures** that reduce the probability (no driving at night, rested driver, seatbelt, speed limit) or the impact (first aid kit, MEDEVAC plan). Then estimate the **residual risk**: if seatbelts and the ban on night driving bring the probability of an accident down to 2, the risk becomes 2 × 4 = 8, medium.

> The final question is always the same: is the residual risk acceptable given the importance of the programme for people? This is the principle of "acceptable risk". If the answer is no, you change the plan, postpone or withdraw: this is a normal decision, not a failure.

Health, documents and duty of care

The **duty of care** requires the employer to take all reasonable measures against foreseeable risks. It also requires staff members to follow the rules and share relevant information. Before departure:

- **Health**: up-to-date vaccinations (yellow fever with an international certificate if the country requires it), malaria prophylaxis and a mosquito net, personal medication for the whole duration plus a margin, a personal first aid kit, blood group noted.
- **Insurance and MEDEVAC**: medical and repatriation cover valid for the country and the activities, assistance number saved in your phone and written on paper.
- **Documents**: passport valid for at least six months, visa, mission order, organisation ID card, travel permits; paper and digital copies kept separately from the originals.
- **Personal security information**: emergency contacts and a "proof of life" form (questions only you can answer) handed to HR or security according to the procedure.
- **Security briefing**: country security plan, procedures, alert phases, movement rules; it must be completed before departure or on arrival, never "later".

Your **personal profile** also matters: nationality, gender, origin, religion or sexual orientation may expose you to different risks depending on the context. Discuss this confidentially with the security manager to adapt the measures, never to exclude.

Logistics, communications and mission budget

Mission logistics are prepared with the local office:

- **Route**: main and alternative roads, distances, realistic travel times for the season, overnight locations, refuelling points.
- **Vehicles**: condition checked (tyres, spare wheel, brakes, lights), first aid kit and fire extinguisher, driver experienced in the area, fuel with a reserve.
- **Communications**: at least two independent means (mobile phone and satellite phone or radio), charged batteries, contact list, agreed **check-in call** times.
- **Accommodation**: chosen for its security (access, guarding, exits), not just for its price.

The mission budget brings together per diems, transport, fuel, accommodation, interpreters, permit fees and a **contingency margin**, usually 10%. **Example.** Team of 3 people, 5 days, per diem of 40 USD per day per person: 3 × 5 × 40 = 600 USD. A vehicle rented at 100 USD per day: 500 USD. Fuel: 500 km at 15 litres per 100 km = 75 litres at 1.20 USD = 90 USD. Subtotal: 1,190 USD; with 10% contingency: 1,309 USD.

Keep your supporting documents: a mission advance must be accounted for on return, down to the last cent.

Exercise: the risk matrix for your mission

Situation. You are leaving for four days to assess displacement sites 180 km from the regional capital, on a track where two vehicle hijackings took place last month, in the late afternoon. The rainy season is starting and malaria is widespread.

Task. 1) Score probability and impact for: hijacking, road accident, malaria, vehicle stuck by rain. 2) Calculate each risk and classify it. 3) Propose two measures for the highest risk and estimate the residual risk.

Sample answer. Hijacking: 4 × 4 = 16, high (recent series on the same track). Accident: 3 × 4 = 12, medium. Malaria: 4 × 3 = 12, medium. Vehicle stuck: 4 × 2 = 8, medium. Measures against hijacking: travel only between 8 am and 3 pm and in a two-vehicle convoy, no valuables visible, clear non-resistance instructions. If these measures bring the probability down to 2, the residual risk becomes 2 × 4 = 8, medium: acceptable if the assessment is essential, with approval from the security manager.

Key takeaways

- Clear ToR: objective, deliverables, scope, real duration, resources, responsibilities; 20% buffer time in difficult areas.
- Context analysis: situation, actors, access, security trends; it is used to make decisions.
- Risk = probability × impact (1 to 25); low 1-5, medium 6-12, high 15-25; aim for an acceptable residual risk.
- Duty of care: health, insurance and MEDEVAC, documents and copies, proof of life, security briefing before leaving.
- Two independent means of communication, agreed check-in calls and a budget with 10% contingency.

Quiz

1. A threat has a probability of 3 and an impact of 5. The risk is:
   A. 8, medium
   B. 15, high
   C. 2, low
   D. 35, critical

2. Which element must appear in a mission's terms of reference?
   A. The hotel restaurant
   B. The deliverables expected on return and who they are for
   C. The colour of the vehicle
   D. The names of all beneficiaries

3. Why plan for two independent means of communication?
   A. To call your family more often
   B. Because the mobile network may be cut or absent, and you must be able to raise the alarm in all cases
   C. It is a donor requirement
   D. To save phone credit

Quiz answers : 1. B · 2. B · 3. B

Day 2 : In the field: travel, respond, work and return

Objectives

- Plan a safe movement with check-in calls and a return deadline.
- Respond to an incident and report it correctly.
- Work with communities and authorities, then close the mission with a debriefing and a report.

Arrival: briefing and first days

As soon as you arrive, ask for the **local office security briefing**, even for a two-day visit. It covers the recent situation, no-go areas, curfew, movement rules, alert phases, assembly points, emergency contacts and expected behaviour (dress, photos, alcohol, relations with the population).

The first days are the riskiest: you know neither the places, nor the codes, nor the weak signals. A few reflexes:

- Save the emergency numbers and keep a paper copy on you.
- Locate the exits of your accommodation and the office, and the route to the assembly point.
- Introduce yourself to the authorities and counterparts designated by the office, with your mission order.
- Listen to national staff: they know the context better than anyone.

> A visitor who ignores local rules endangers the whole team, not just themselves. The rules apply to the visiting director as much as to the driver.

Planning and conducting a movement

Every movement outside town is authorised and tracked according to the office procedure. The **movement plan** states: passengers, vehicle and driver, route and alternatives, departure time, expected arrival and return times, check-in call times, means of communication, and the person tracking the movement at the office.

Calculating the timings. On a track, use a realistic average speed, often 25 to 40 km/h, not the maximum speed. For 120 km at 30 km/h: 4 hours of driving. Departure at 7 am, arrival at 11 am; 3 hours of work; return at 2 pm, arrival at 6 pm. If the office requires a return before 5 pm, the plan is not feasible: you must reduce the work on site, plan an overnight stay on site or split the mission.

Check-in calls and the no-contact procedure. The vehicle calls at agreed times or points. If a call is missed, the office follows a written procedure: call back on all means, then, after a

set delay (often 30 minutes), alert the security manager, who decides on the next steps. Nobody goes off to "see what is happening" without a decision.

At checkpoints: slow down early, stay calm and polite, hands visible, show your documents, offer nothing, take no photos, do not argue or force your way through. If armed people demand something, life comes before equipment.

Responding to and reporting an incident

An incident (accident, theft, assault, arrest, threat) is managed in three stages: **survive and get to safety**, **raise the alarm**, then **report**.

- **Road accident**: secure the scene, give assistance, alert the office; depending on the context, it may be dangerous to remain at the scene after an accident involving a third party: apply the instruction in the security plan.
- **Theft or hijacking**: do not resist, comply calmly, avoid sudden movements, do not stare; property can be replaced.
- **Arrest or detention**: stay calm, ask to contact your organisation, sign nothing you do not understand.
- **Gunfire or explosion**: take cover, move away as soon as possible, do not go closer to look.

The **immediate alert message** is short: who, what, where, when, condition of the people, immediate need. The written **incident report** follows within 24 hours: facts, timeline, consequences, measures taken, recommendations. Even a "near miss" (near accident, verbal threat) must be reported: this is how the organisation detects a trend before a tragedy.

> Never hide an incident for fear of being sanctioned. An organisation that punishes those who report stops learning and puts everyone at risk.

Working with communities and authorities

The security of a humanitarian mission rests first of all on **acceptance**: being known, understood and seen as useful. It is built through the behaviour of every person on mission:

- **Explain** who you are, why you are coming and what you cannot promise; never raise expectations of aid without a decision.
- **Respect the principles** of humanity, neutrality, impartiality and independence in words as well as in choices (whom to meet, where to stay, whom to travel with).
- **Protect people and data**: informed consent before any interview, no names or identifiable photos without agreement, sensitive data encrypted or left at the office.
- **Apply the code of conduct** and protection from sexual exploitation and abuse (PSEA): no sexual relations in exchange for aid, report any suspicion through the designated channels.
- **Inform the authorities** according to the rules of the country and the office, without passing on information that would expose people.

The choice of counterparts, interpreters and drivers also sends a message: an interpreter perceived as linked to one party can close doors and endanger the people interviewed.

Returning: debriefing, report and recovery

A mission is only finished when its results can be used. On return:

- **Debriefing** within 48 hours with your manager: results, decisions to be taken, incidents and near misses, security information to share.
- **A short, useful mission report**: objective, what was done, main findings supported by data, dated recommendations with a person responsible, annexes (list of people met in line with data protection rules, authorised photos).
- **Feedback** to the teams and, where possible, to the communities met: what was taken on board and what will happen next.
- **Administrative closure**: accounting for the advance, returning equipment, updating contacts.

Recovery is part of the mission. Cumulative stress (fatigue, insecurity, exposure to suffering) is normal; it becomes dangerous when it sets in. The Antares Foundation guidelines recommend preparation before departure, monitoring during the mission, a debriefing and access to psychological support on return. Sleeping, taking a real break and talking to someone you trust are not weaknesses.

Exercise: a realistic movement plan

Situation. You must supervise a distribution 135 km from the office. Average speed on the track: 30 km/h. The distribution lasts 3 hours. Office rule: no vehicle on the road after 5:30 pm. Check-in calls every hour. The vehicle uses 16 litres per 100 km; a 25% reserve is mandatory.

Task. 1) What is the latest departure time for a same-day round trip? 2) Is it realistic if departure cannot take place before 7 am? 3) How much fuel should be planned?

Answer. Journey: 135 / 30 = 4 h 30 each way. Total time: 4 h 30 + 3 h + 4 h 30 = 12 h. To be back by 5:30 pm, you would have to leave at 5:30 am, before daybreak, which generally contradicts the ban on night driving. With a 7 am departure, the return would be at 7 pm: the plan is not feasible in one day. Solutions: overnight stay on site in an approved location, distribution supervised by the local team with a video call, or a two-day mission. Fuel: 270 km × 16 / 100 = 43.2 litres, plus 25%: 54 litres.

Key takeaways

- Local security briefing on arrival, even for a short visit; the rules apply to everyone.
- Timings calculated with a realistic average speed; a plan that exceeds the deadline is changed before leaving.
- Missed check-in call: written procedure, call-backs, then alert to the security manager after the set delay.
- Incident: get to safety, raise the alarm (who, what, where, when, condition, need), written report within 24 h; report near misses too.
- A mission is finished only after the debriefing, a useful report, feedback, administrative closure and recovery.

Quiz

1. A 90 km journey on a track at 30 km/h takes:
   A. 2 hours
   B. 3 hours
   C. 1 hour 30
   D. 4 hours

2. Armed men demand your vehicle at a roadblock. You:
   A. Refuse and speed off
   B. Comply calmly, without resisting: life comes before equipment
   C. Negotiate the price at length
   D. Take a photo for the report

3. Why report a near miss?
   A. To get a bonus
   B. So that the organisation detects a trend before a serious incident happens
   C. It is not useful
   D. To sanction the driver

Quiz answers : 1. B · 2. B · 3. B