



National
Guidance
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Requirements & Recommendations for Employers

Provision of Guidance, Training and Access to Advice

An employer must ensure that its employees are provided with appropriate guidance. This can be done by formally adopting National Guidance as part of a policy for outdoor learning and off-site visits which also includes details of any specific local requirements.

There must be training regimes in place to support the guidance, and to ensure that it is understood. The following Outdoor Education Advisers' Panel (OEAP) training courses are recommended:

- Educational Visit Coordinator (EVC) Training and 3-yearly Revalidation;
- Visit Leader Training (revalidation not required).

An employer should provide suitable systems to ensure that learning is updated and thus remains effective. This can be through attendance at a formal revalidation, provision of a web site or newsletter updates. The process chosen should be made clear by the employer.

Further advice and access to information to support the training should be made available from an appointed adviser or team of advisers. They should have proven expertise and professional understanding of the guidance, the training and current good practice. Details of the role of Outdoor Education Adviser are set out below.

Notification and Approval

Employers should consider whether, and under what circumstances, they require their establishments to notify them about planned visits, or to seek approval for visits. Reasons for an employer to require notification and/or approval might include:

- Monitoring the level, range and quality of activity undertaken by its establishments;
- Assisting an Outdoor Education Adviser to challenge plans and to support high quality learning;
- Enabling the employer to undertake sample monitoring of visits (either desk-based or in the field);
- Having information available in an emergency or to deal with media enquiries (e.g. knowing whether any groups are in a particular location in the event of an incident such as terrorism or transport disruption);

- Enabling expert review of arrangements for any adventure activities led by establishment staff;
- Corporate parenting issues (e.g. young people travelling overseas).

Employers may delegate some or all of the approval, notification and recording process to establishments but they must set down clear expectations for what they wish to happen and be clear about who is responsible for what.

It is likely that an employer will adopt one of the following options:

Approval Option 1: The employer establishes defined categories of visit and makes clear to establishments which categories of visit require notification and which require approval. They further clarify who is responsible for approval. Often, the employer retains approval for some categories.

Approval Option 2: The employer delegates formal approval without exception, but may still require notification of activities or visits that meet clearly stated criteria.

Either of the above may be combined with an IT system that provides automatic notification, allows approval to be delegated where required, and records an audit trail.

In all cases, if an establishment is unclear about whether their employer requires notification or approval for a particular visit, they should consult their Outdoor Education Adviser.

Other Issues

Emergency Planning and Critical Incident Support

Employers should have plans that will effectively support establishments in the event of a critical incident. See document [4.1e "Emergencies and Critical Incidents - Guidance for Employers"](#).

Monitoring

Employers must ensure that they monitor their health and safety arrangements. Monitoring may be a duty of one or more of an employer's officers, or aspects of it may be delegated to establishments. See document [3.2b "Monitoring"](#).

Approval of Leaders

Employers should provide clear advice to establishments about how to approve leaders. See document [3.2d "Approval of Leaders"](#).

Role-Specific Requirements and Recommendations

Within the education and youth sectors there are many types of employer, for example:

- Local authority;
- An academy or multi academy trust;

- The governing body of a voluntary-aided or foundation school;
- The owners or trustees of an independent school;
- The trustees of a charity;
- The directors of a company.

There may also be a range of employee job titles and descriptions carrying some responsibility for the health, safety and welfare of young people engaged in outdoor learning, off-site visits and Learning Outside the Classroom. You can find further guidance on roles (which can be adapted to fit your circumstances) as follows:

1. Directors of Children's Services and Lead Member(s) or Chief Executive or Chair of Board – document [3.4a "Director of Children's Services"](#) and document [3.4b "Lead Member for Children's Services"](#);
2. Line Manager of an Outdoor Education Adviser (or equivalent post) – document [3.4c "Outdoor Education Adviser Line Manager"](#);
3. Outdoor Education Adviser or Technical Adviser – document [3.4d "Outdoor Education Adviser"](#);
4. Teacher Advisers and Educational Health and Safety Officers – document [3.4e "Teacher Advisers and Health and Safety Officers"](#);
5. Manager of an Outdoor Centre – document [3.4i "Manager of an Outdoor Centre"](#).

Outdoor Education Adviser

It is strongly recommended that all employers appoint or retain the services of a competent and experienced Outdoor Education Adviser (or equivalent) to oversee all aspects of their provision of outdoor learning, off-site visits and Learning Outside the Classroom.

Employers must understand that they carry full legal responsibility. Choosing **not** to appoint a competent adviser leaves them in a vulnerable position. In the event of any proven civil negligence, this can result in the payment of heavy damages. In the case of criminal negligence under the Health and Safety at Work etc. Act (1974) or the Corporate Manslaughter and Corporate Homicide Act (2007), the ultimate sanction is a custodial sentence.

Where an employer chooses not to make such an appointment and instead shares the functions and responsibilities between a team of employees, all such employees should be specifically competent in the areas for which they take responsibility. There must be a clear audit trail that ensures responsibilities can be tracked and line-managed.

The effectiveness of the Outdoor Education Adviser (or equivalent) is at the heart of an employer's ability to carry out their responsibilities, and the job description should reflect this. For more information about this role, see document [3.4d "Outdoor Education Adviser"](#).

