



National  
Guidance

<http://oeapng.info>

## Requirements and Recommendations for Employers

### Provision of Guidance, Training and Access to Advice

An employer **must** ensure that its employees are provided with appropriate guidance, that there are training regimes in place to support it and that the guidance is understood. We recommend the following training courses:

- Educational Visit Coordinator (EVC) Training and Revalidation.
- Visit Leader Training (Revalidation not required).

An employer should provide suitable systems and processes 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 appointed advisers 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 and a recommended person specification are set out below.

### Notification and Approval

Employers **must** be clear about what happens when responsibilities and functions are delegated, especially the detailed requirements for notification and/or approval of activities.

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

**Approval Option 1:** The employer establishes defined categories of off-site activity or 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 the higher categories of visit.

**Approval Option 2:** The employer delegates formal approval without exception, but may still require a formal notification of defined activities 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 an activity requires notification or approval, the failsafe option should be that notification/approval is passed to the employer.

## Other issues

### Emergency Planning and Critical Incident Support

Employers **must** provide appropriate emergency planning procedures to support establishments in the event of a critical incident.

### Sample Monitoring

Employers **must** ensure that there is a sample monitoring process. Monitoring may be a duty of one of its officers, or may be delegated to establishments.

### Approval of Leaders

Employers **must** provide clear advice about how to approve leaders.

## Role specific Requirements and Recommendations

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

- An 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 are also a many job titles and descriptions, which will carry some responsibility for the health, safety and welfare of young people engaged in outdoor learning, offsite visits and Learning Outside the Classroom. You can find further guidance on the following 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 technical adviser to oversee all aspects of their provision of outdoor learning, off-site visits and Learning Outside the Classroom. In a local authority, this will usually be one of the following:

- Outdoor Education Adviser (OEA).
- Adviser for Learning Outside the Classroom.
- Visits Adviser.
- Consultant for Outdoor Learning.
- Various permutations of the above designations or similar terms.

Employers must understand that they carry full legal responsibility. Choosing **not** to appoint a technical expert 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 under Corporate Manslaughter legislation (2008), 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 Adviser for Outdoor Education (or equivalent) is at the heart of an employer's ability to carry out their responsibilities and the job description should reflect this.

