



National
Guidance

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Establishment Roles and their Interdependence

This document provides an overview of the roles relevant to outdoor learning and off-site visits typically found in establishments, and their inter-dependence. These roles are:

1. Management Boards/Governing Bodies
2. Heads/Managers
3. Educational Visit Coordinators
4. Visit and Activity Leaders
5. Assistant Leaders
6. Helpers
7. Volunteers

An outline of these roles is provided below. Further guidance relevant to each of them can be found by using "Browse by Role" on the home page of National Guidance, or "Guidance for your role" on other pages.

There is also guidance for parents in the document 3.4n "Guidance for Parents".

Establishments without these specific roles should interpret the guidance to meet their particular circumstances, ensuring that the key requirements and recommendations are met.

Establishments should have access to expert advice, such as from a competent Outdoor Education Adviser appointed by the employer.

Management Boards and Governing Bodies

Members of a management board or governing body should view their main function as being 'to enable and ensure', sometimes described as being a 'critical friend'. It is vital that there is a close and supportive but challenging relationship with the establishment's head/manager.

Where an establishment does not have a management board or governing body, this function is the responsibility of the employer, usually through the line manager of the establishment's head/manager.

If the management board/governing body is the employer of establishment staff, it must be fully aware of an employer's responsibilities. See document 3.1a "Requirements and Recommendations for Employers".

You can find more detailed guidance about the role in document 3.4f “Member of a Management Board or Governing Body”.

Heads/Managers

A head/manager should ensure that the establishment has policies and procedures for outdoor learning and visits that conform with their employer’s guidance. They are responsible for ensuring that establishment staff are competent for the roles allocated to them, and that there is a robust system in place for approving leaders and approving plans for activities and visits.

Many of the day-to-day tasks associated with the responsibilities of a head/manager can be delegated to an EVC, depending upon their competence.

You can find further guidance in document 3.4g “Head Teacher/Manager” and 5.3b “How to Write an Establishment Visits Policy”.

Educational Visits Coordinators

It is good practice for all establishments to have an Educational Visits Coordinator (EVC), and the employer’s policy may make this a requirement. In smaller establishments, the role of EVC is sometimes held by the head/manager. Where an EVC is not nominated, by default the responsibilities of the role rest with the head/manager.

The EVC is the establishment’s focal point for planning and monitoring visits and outdoor learning. They should work closely with the head/manager and with Visit Leaders.

The EVC should be an experienced Visit Leader with sufficient status within the establishment to guide the working practice of colleagues leading outdoor learning and visits. This cannot be a purely administrative role, although certain functions may be delegated to an administrator. Where the EVC does not meet these criteria (as where the EVC role is attached to an administrative post or where a post holder is not an experienced Visit Leader), they should have structured access to and support from a designated colleague who fits the recommended criteria and who will fulfil those aspects not covered by the post holder.

You can find further guidance, including about the EVC’s key functions, in document 3.4j “Educational Visits Coordinator (EVC)”.

Visit Leaders, Activity Leaders and Assistant Leaders

A Visit Leader is the person who has overall responsibility for managing a visit, including for the health and safety of participants and staff, and the supervision, welfare, learning and development of the participants. They should work closely with the EVC when planning a visit, and are responsible for deploying the Activity Leaders during a visit.

An Activity Leader is responsible for the management of a group (or subgroup) taking part in a specific activity within a visit, including for their supervision, health,

safety, welfare, learning and development. They are responsible to the Visit Leader.

An Assistant Leader supports the Visit Leader or an Activity Leader, and may be required to take over from them if necessary.

You can find guidance about the responsibilities of these roles, and the competence necessary to fulfil them, in documents 3.4k "Visit or Activity Leader", 3.4l "Assistant Leaders" and 3.2d "Approval of Leaders".

Helpers

A Helper is a person (normally an adult) who has an agreed role during a visit, but who is not a Visit Leader, Assistant Leader, Activity Leader or participant. For example, a Helper might be: an inexperienced member of staff; a parent; an apprentice, student or trainee; a carer. Any child or young person acting as a Helper should be regarded as a participant for the purposes of supervision, safeguarding and parental consent.

You can find further guidance in the document 3.4m "Helper".

Volunteers

Depending upon an employer's policies, a Volunteer may take any role in a visit, including Visit Leader, Activity Leader, Assistant Leader and Helper. Whichever role they take, they must meet the requirements for that role.

You can find further guidance in the document 3.4o "Volunteer".

