



<http://oeapng.info>

## Establishment roles and their inter-dependence

This document provides an overview of the range of roles and their inter-dependence that are typical of Establishments in fulfilling legal, organisational and educational expectations. The roles are:

1. Management Boards and Governing Bodies
2. Heads and Managers
3. Educational Visit Coordinators (EVCs)
4. Visit and Activity Leaders
5. Assistant Leaders
6. Helpers
7. Volunteers
8. Parents

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

## Management Boards and Governing Bodies

Members of a Management Board or Governing Body should view their main role as being "to enable and ensure"; otherwise described as being a "critical friend".

A Management Board/Governing Body should ensure that:

- It has a clear understanding of whether or not it is the employer of establishment staff and is fully aware of an employer's responsibilities under health and safety law.
- There is guidance in place - either its own or having formally adopted the Employer's guidance (e.g. that of a local authority)
- Robust systems support implementation of the guidance.
- They challenge in order to be clear about how outdoor learning and visits lead to a wide range of outcomes for children and young people and contribute towards establishment effectiveness.
- There is an establishment visits/outdoor learning policy and procedures – including emergency procedures – and it supports the principles of inclusion.
- The involvement in Board/Governing Body in the visit approval process is clear and approval and notification procedures operate effectively.

- There is a trained EVC who meets the employer's requirements, with a sufficient time allowance to fulfil the role and training to support the planning and delivery of visits and outdoor learning.
- There are monitoring procedures in place, activity is evaluated, good practice is shared and any issues are followed up to comply with statutory and employer's requirements.

You can find further guidance in the document 3.4f *'Member of a Management Board or Governing Body'*.

## Heads/Managers

Heads/Managers should:

- Have an establishment visits/outdoor learning policy and procedures that conform to and follow the requirements and recommendations of their employer's guidance.
- Be aware that the appointment of an Educational Visits Coordinator (EVC) is critical to the implementation of this guidance. The EVC should be appropriately competent to their role (see below) and should be allowed sufficient time to fulfil the role, including attendance at OEAP-approved training. Heads/Managers may choose to designate themselves as EVC. Where the Head/Manager has not designated a named member of staff, then the functions of the EVC will automatically be attached to those of the Head/Manager.
- Keep the Board/Governing Body informed about the delivery of visits and outdoor learning and their contribution towards establishment effectiveness. This could be as a standing item in the Heads/Mangers report to the Board/Governing Body.
- Where needed, have access to expert advice such as from an accredited outdoor education adviser.

You can find further guidance in the document 3.4g *'Head Teacher/Manager'*.

## Educational Visits Coordinators (EVCs)

The EVC is the establishment's focal point for planning and monitoring visits and outdoor learning. In appointing an EVC, careful consideration should be given to:

- Significant experience of practical outdoor learning and visit leadership.
- Status within the Establishment that enables guiding of the working practices of their colleagues.

Sufficient time should be agreed to fulfil the role and to attended OEAP approved EVC training and update/revalidation as required. An establishment may choose to train more than one member of staff so that the administrative tasks can be separated from the operational functions.

For an EVC to be effective, their responsibilities and functions should be clearly stated in the establishment's policy providing clarity to:

- The role of the EVC in the formal approval process.
- The nature of monitoring (EVC, governor, peer monitoring etc).

- What activities, if any, require consultation/approval from the adviser.
- Where needed, access to expert advice such as from an accredited outdoor education adviser.

The EVC should ensure that all visits meet the employer's and establishment's policies, procedures and requirements. This includes appropriate monitoring, evaluation and recording to ensure that the Head/Manager and Board/Governing Body can access the data they require.

You can find further guidance including the EVC's key functions in the document 3.4j '*Educational Visits Coordinator (EVC)*'.

## Visit and Activity Leaders

The Visit Leader has the overall responsibility for supervision and conduct of the visit. To ensure accountability and to avoid potential confusion, a single Visit Leader should be designated. If this role changes during a visit, a clear handover should be made. An Activity Leader is responsible for a particular activity during a visit.

The key requirements for Visit/Activity Leaders are that they must be competent to lead, confident and accountable, not that they hold a particular post, title or job description.

Being **competent** means that the leader has demonstrated the ability to lead to the level demanded by the visit, and has sufficient relevant experience and knowledge of the activities, the group, and the environments they will operate in.

Competence is a combination of skills, knowledge, awareness, judgement, training and experience. It is not necessarily related to age or position within the establishment. It is situational – a leader who is competent in one activity or environment may not be so in another, and it involves breadth as well as depth. Relevant experience is not necessarily gained by repeating the same thing several times, but by experiencing a range of different activities and environments.

Being **confident** includes the Leader's capacity to take charge of a situation and their awareness of their abilities as well as their limitations.

Being **accountable** means that the leader has been engaged through a clear process which includes vetting and appropriate induction into the establishment's policies and procedures. Regardless of employment status, Leaders must be clear about the chain of accountability and what is expected of them.

A Visit/Activity Leader **must** follow the employer's guidance and establishment policy and procedures.

A Visit /Activity Leader **must** ensure that the activity is properly planned including assessing the risks to ensure that there is wide understanding about what everyone needs **to do**. A Visit/Activity Leader **must** ensure that the roles and responsibilities of other staff (and young people) are properly defined and communicated, ensuring effective supervision.

You can find further guidance in documents 3.4k '*Visit or Activity Leader*' and 3.2d '*Approval of Leaders*'.

## Assistant Leaders

Assistant Leaders should be:

- Accountable.
- Suitably knowledgeable about establishment and employer policies/procedures as they affect the responsibilities they have been assigned.
- Specifically competent and confident to carry out such tasks as they are assigned, and to take over if the Visit Leader is incapacitated.
- Fully briefed to ensure that they understand the role and responsibilities expected of them.

The exact competence requirements should be guided by the assessment of the risks and what the Assistant Leader may be expected to do. You can find further guidance in the document 3.4l '*Assistant Leaders*'.

## Helpers

Helpers should be:

- Subject to an appropriate vetting decision by Heads/Managers.
- Used appropriately and not used to replace an Assistant Leader.
- Suitably competent and confident to be able to carry out the duties they are assigned and understand how these integrate with other staff.
- Enabled to contribute to the evaluation of all aspects of the visit/outdoor learning.
- Appropriately briefed on:
  1. Relevant establishment and visit/outdoor learning procedures.
  2. Group characteristics, including age, health, capabilities, special educational needs, behaviour and any other relevant matters in the context of the visit/outdoor learning.
  3. Nature, location, and aims and learning outcomes of the activity.

Where the helper is a parent (or otherwise in a close relationship with a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise group management, particularly if there is a serious incident. There is a probability that the helper may be distracted by the needs of their own child, rather than looking to the needs of the whole group. This means that the Visit Leader should directly address this issue as part of the assessment of risks and not assign a helper to a leadership role which gives them a direct responsibility for their own child, other than where this is a risk-managed part of the plan.

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, Assistant Leader, Activity Leader, Helper. Whichever role they are used in they must meet the requirements of that role.

## Parents

Parents should be aware of the following:

- Their right to full information.
- Their need to provide full information about their child.
- The requirements for parental consent (where applicable).
- The need for parents and young people to have a proper understanding of behavioural expectations and sanctions which may be set out in a Code of Conduct.
- The need to provide a 24/7 home emergency contact number.

You can find further guidance in the document 3.4n 'Guidance for Parents'.

