



National
Guidance

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Visit or Activity Leader

All Leaders have a legal duty of care and must comply with their employer's policy and guidance.

The Visit Leader has overall responsibility for a visit. This includes the learning, development and supervision of the participants and the safety of all, including any other leaders and helpers.

An Activity Leader is responsible for one or more specific activities during a visit:

- During some visits, all the participants remain in one group. The Visit Leader might act as Activity Leader for all activities during the visit, or hand over leadership of one or more activities to an Activity Leader or third-party provider, while retaining oversight.
- During other visits, the group splits into smaller groups for some activities. In this case, the Visit Leader hands over the leadership of one or more activity groups to an Activity Leader or third-party provider, while retaining oversight of the whole visit and perhaps acting as an Activity Leader for one group.

Sometimes a Visit Leader or Activity Leader is supported by one or more Assistant Leaders or Helpers. Decisions about the number of leaders required, and staffing ratios, should be informed by risk assessment.

See the following documents for further information:

- 3.4l "Assistant Leaders"
- 3.4m "Helper"
- 4.3b "Ratios and Effective Supervision".

Planning for a visit should include consideration of the possibility of the Visit Leader or an Activity Leader becoming incapacitated. This might be caused by illness, injury, personal issues or being required elsewhere (such as to look after a sick child). Consideration of the SAGE variables: (Staffing, Activity, Group and Environment) should lead to an appropriate decision on both the number of leaders as well as the mix of competence needed to fill various roles.

Plans could include, for example:

- The group is accompanied by an Assistant Leader who is fully competent to take over and deputise for the incapacitated Visit Leader or Activity Leader.
- The group is accompanied by an Assistant Leader or Helper, who is sufficiently competent to abandon the visit or activity and supervise the group safely back to base (or who could supervise the group until support from the establishment can arrive).
- A backup Leader is available back at the establishment, who is able to join the group at short notice.
- No other responsible adult is present, but the participants are judged sufficiently responsible and competent to deal with such a situation.

Key Requirements for Leaders

The key requirements for leaders are that they must be competent to lead, confident and accountable, not that they hold a particular post, title or job description. There should always be a single designated leader for any visit or activity and, if this role changes, there should be a clear handover.

Being **competent** means that the leader has demonstrated the ability to lead to the level demanded by the visit or activities that they are to lead, 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.

For adventure activity leaders, competence is best demonstrated through:

- Holding a National Governing Body leadership/coaching award at an appropriate level, or
- Being "signed off" by a suitably-qualified Technical Adviser appointed by the employer.

For further information about appropriate technical qualifications, to lead or advise on specific adventure activities, see the qualifications matrices produced by the Adventure Activities Licensing Authority (AALA) in AALA guidance note 5.18 available from the Health and Safety Executive (HSE) website. You may need to copy and paste the link into your browser:

<http://webcommunities.hse.gov.uk/connect.ti/adventureactivitiesnetwork/view?objectId=582565>

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

Being **accountable** means that the leader has been engaged through a clear process that 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.

If you are designated as the Visit Leader, you should:

- Be specifically competent for the type of visit, and for any activities you plan to lead.
- Be approved by your employer to carry out the lead role, including for any specific activities you will lead.
- Be able to use the chosen environment or venue(s) to provide a wide range of learning or development outcomes.
- Liaise with your establishment's Educational Visits Co-ordinator (EVC) to ensure that the visit has clear aims and is planned to appropriately balance benefits and risks, and that all staff accompanying the visit meet establishment requirements.
- Ensure that there is effective supervision.
- Take a lead on risk management. It is good practice to involve all the visit leadership team to ensure wide understanding and to give clarity about what they need **to do**. It is also good practice to involve young people wherever appropriate.
- Define the roles and responsibilities of other leaders and helpers (and participants) to ensure effective supervision throughout the visit, appointing a deputy wherever possible.
- Ensure that any Activity Leaders are competent and confident to lead their planned activities, and are approved to do so if this is necessary (e.g. for adventure activities).
- Ensure that child protection issues are addressed (e.g. good safeguarding practice is followed and adults are appropriately vetted and checked).
- Provide relevant information to other leaders including the aims and how they can contribute to achieving these, the location, the participants (age, health information, capabilities, special needs, safeguarding and behavioural issues)
- Ensure that informed parental consent has been obtained as necessary.
- Provide relevant information to parents and participants, and arrange pre-visit information meetings where appropriate.
- Make sure there is access to first aid at an appropriate level.
- Ensure that if the visit leadership team includes someone with a close relationship to a member of the group, this is managed to avoid any possible compromise of effective supervision.
- Ensure that all leaders and any third party providers have access to emergency contact and emergency procedure details.
- Evaluate all aspects of the visit, both during and after the event.
- Report any accidents, incidents or near misses.

When working with third-party activity providers it is essential to avoid 'grey areas'. There should be a clear handover before and after any activity led by a provider. Should a provider run an activity in a way that causes concern, the accompanying leaders should consider stopping the activity at the first appropriate moment. Such an intervention should be done with sensitivity and discretion to ensure that it does not result in young people being put at greater risk.

