



National
Guidance
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Using External Providers

Establishments sometimes use external providers to support, enhance or supplement their own resources to maximise the outcomes from a visit. This document considers how establishments and providers should work together, and in particular the roles and responsibilities of establishment staff and provider staff.

A 'provider' means any person or organisation external to your establishment contracted to organise and/or lead all or part of a visit or activity. For example:

- A museum or other venue where their staff lead educational activities;
- An activity instructor or guide;
- A tour operator;
- An activity, field studies or outdoor education centre;
- A ski school;
- A Duke of Edinburgh Award centre or activity provider;
- An expedition company.

Selecting a Provider

As part of visit planning, any external providers should be assessed as suitable to meet the establishment's and group's needs and requirements, and relevant safety standards. For guidance on choosing a provider, see document 4.4g "Selecting External Providers and Facilities".

Monitoring

You must monitor any provider you use so that you are satisfied with the quality and safety of their practice. See document 3.2b "Monitoring" for ways this might be done.

Roles and Responsibilities during a Visit

National Guidance defines certain roles, including 'Visit Leader', 'Activity Leader' and 'Assistant Leader'. You should be familiar with the guidance about these roles and their associated responsibilities in document 4.2a "Group Management and Supervision".

The same principles apply when working with providers' leaders as when working with establishment leaders. Different organisations sometimes use different role

titles (e.g. 'group leader/instructor') or assign different responsibilities to roles with the same name.

When using an external provider the default position should be for an establishment Visit Leader to remain in overall charge and for establishment leaders to accompany participants during activities. The establishment leaders can thus provide:

- Oversight of the visit and the achievement of its aims;
- Continuity for the participants, including for their learning and development;
- Supervision, welfare support and tuition;
- Monitoring and evaluation of the provider.

Examples of where the default position may not be appropriate are given below.

For further guidance about supervision, see documents 4.2a "Group Management and Supervision" and 4.3b "Ratios and Effective Supervision".

Establishment Staff as Activity Leader(s)

Often the role of Activity Leader(s) can be taken throughout the visit by establishment staff. This means that they are always responsible for supervision and welfare support. For example:

1. A school group visits a museum. Teachers from the school accompany the children and remain as Activity Leader(s) and thus responsible for supervision and welfare support throughout the visit. The museum's educational staff facilitate learning, using demonstrations and some science activities.
2. A group from a youth organisation attends a training day at a professional football club. Youth workers accompany the young people and remain as Activity Leader(s) and thus responsible for supervision and welfare support throughout the visit. The football club staff take on responsibility for football coaching, and also contribute to the welfare of the young people (e.g. by establishing rules of safe conduct on the football pitch and by giving encouragement and advice), but the overall responsibility for supervision and welfare remains with the youth leaders throughout the activity.

In these examples, it is not necessary for the provider staff to have undergone DBS checks: see document 3.2g "Vetting and DBS Checks".

Provider Staff as Activity Leader(s)

For some types of visit, it can be good practice for the role of Activity Leader (including responsibility for supervision and welfare support) to be handed over to provider staff. For example, this is appropriate for an adventure activity where the establishment staff are not sufficiently competent to supervise throughout the activity.

In considering whether it is right to hand over the role of Activity Leader to a provider, you should consider:

- The aims of the visit, and whether these are best achieved through leadership by establishment staff or provider staff;
- The additional opportunities which provider staff can make available;
- The competence and experience of the provider staff in the areas to be fulfilled by them (e.g. supervision, welfare support; tuition, technical/practical support);

- Whether provider staff (in the UK) have undergone DBS checks if necessary (see document 3.2g “Vetting and DBS Checks”);
- The competence and experience of available establishment staff;
- The level of trust between provider staff, participants and establishment staff;
- Your capacity and competence to monitor the provision (the more confident you are in the provision, the less closely you may need to monitor);
- If in doubt, advice from your Outdoor Education Adviser.

When the role of Activity Leader has been handed over to a provider, in most cases it remains good practice for establishment staff to accompany the group during the activity. This means that they can:

- Assist provider staff in leading the activity, contributing to their supervision and welfare support;
- Provide tuition (e.g. if the provider is a mountaineering leader and the establishment staff is a geography teacher);
- Provide continuity between the visit and the establishment, and thus maximise the opportunity for learning and development (e.g. through follow-up work using the experience as a basis for reflection and inspiration);
- Monitor the provision;
- Assist in the event of an emergency;
- Develop their own leadership skills.

Sometimes it is not possible or appropriate for establishment staff to be with a group during an activity led by a provider. This might be a planned choice or because of unforeseen events. For example:

- Some small group activities may mean that there are insufficient establishment staff available to accompany each group;
- The establishment staff may need to leave the group, for example to look after a participant who is sick or injured;
- The establishment staff may not be sufficiently competent or confident in the activity to accompany the group or to make any effective contribution;
- The participants may be operating under remote supervision of provider staff, in an environment unfamiliar to establishment staff;
- Establishment staff may decide that the participants will benefit from not having them present during the activity.

In such circumstance, before making a planned choice to NOT have establishment staff accompany participants during an activity, you should consider the following questions and discuss any concerns with the provider:

- Is the provider’s Activity Leader competent to manage all aspects of supervision, welfare support and tuition without the presence of establishment staff?
- How will the participants feel without establishment staff present?
- How will learning from the activity be maximised?
- Are you confident that it is not necessary for establishment staff to be present to monitor the provider?
- What will happen if any of the participants fall sick, are injured or seriously misbehave?
- What will happen in the event of an emergency or serious incident?
- What will happen if the provider’s leader is incapacitated?

Examples of Provider Staff as Activity Leader(s)

1. A school class visits a local nature reserve to learn about the environment and wildlife. While at the reserve, the class divides into two groups: one follows a waymarked path to visit a bird hide and learn about the trees and other plants, while the other group engages in a pond-dipping exercise. They meet at lunchtime, and then swap activities.
 - a. One teacher and a teaching assistant accompany the visit. To maximise learning the nature reserve warden is used to lead half of the class. The warden is well known to the establishment and has been appropriately selected.
 - b. The class teacher acts as Visit Leader, and as Activity Leader for the pond dipping.
 - c. The warden acts as Activity Leader for the nature walk.
 - d. The teaching assistant acts as Assistant Leader, supporting the needs of particular children.
2. A school group visits a residential outdoor education centre providing adventure activities. The teachers act as Activity Leaders overnight and during meal times. The young people divide into small groups for the adventure activities and school staff hand over the role of Activity Leader (including the responsibility for supervision and welfare, as well as instruction) during these activities to the centre's instructors. Where possible a member of the school staff accompanies each group to provide support. Sometimes this is not possible:
 - a. One day a teacher has to stay back at the centre to look after a sick child, and so cannot accompany a group.
 - b. One activity is multi-pitch rock climbing with groups of two children led by one instructor, and it is not possible for teachers to accompany them.
 - c. Some activities (e.g. orienteering) are managed with indirect or remote supervision, and the teachers may not have the competence required to go to the aid of a child needing help in a remote environment.
3. A school group is on a skiing visit to the Alps. They have engaged the local ski school to provide skiing lessons. Each day, at the start of the lessons, the group divides into small groups and the teachers hand over their roles as Activity Leaders (including responsibility for supervision, welfare and instruction) to the ski instructors. A teacher accompanies each group to provide support, when possible. Sometimes this is not possible, for example:
 - a. In some circumstances the school staff may not have the competence or confidence to provide welfare support and may need to rely totally on the instructor for this: for example, to give emotional support to a frightened child on a steep slope, or first-aid to an injured child.
 - b. The teacher may need to leave the group in order to look after, for example, a child who has begun to feel sick. In this case the instructor would remain responsible for supervision and welfare of the child until they had brought the group to a safe place where responsibility for the sick child can be handed over to the teacher.

4. A youth organisation runs a summer camp. The Activity Leaders for most of the activities are the organisations' youth leaders. On one day of the camp, the Visit Leader engages a local adventure activity provider to provide a caving trip. The caving instructor takes over as Activity Leader (and therefore is responsible for supervision and welfare as well as instruction). The youth leaders, who are not experienced cavers, become participants for the day alongside the young people, providing support where they can. The Visit Leader remains at camp to act as an emergency contact.
5. A UK school visits Germany as part of a cultural exchange. Students are provided with homestays organised and vetted by the host German school. The host families take full responsibility for supervising the young people while in the family setting, including for agreed family activities, thus acting as Activity Leaders (see document 7f "Exchanges and Homestays").
 - a. The UK school staff act as Activity Leaders during the journey to Germany.
 - b. When the group arrives at the host school, the group meets the host families and the UK staff hand over the role of Activity Leaders to adults from each host family. The Visit Leader and other UK staff stay locally with host staff and visit each household once during the week-long visit in order to thank the hosts and to monitor the provision. They also exchange daily text messages with the young people to check that all is well, and are available to be contacted by the young people at any time day or night in the event of a concern or emergency.
 - c. On some days during the visit, there are cultural events organised by the German School. The families hand the role of Activity Leader back to the UK staff for these events.

Visits with No Establishment Leader

In some exceptional circumstances, it may be appropriate for a visit to operate without any establishment leader present. In these cases, the provider's staff would take the role of Visit Leader as well as Activity Leader(s).

When deciding if this is appropriate, you should consider the same issues involved when a provider's Activity Leader is to operate without establishment staff present (see above), but in more depth. You should also give particular attention to the following questions:

- How will there be any continuity for participants (e.g. for learning and development)?
- What are the expectations of participants, parents and your employer?
- What would happen if there was a serious incident during the visit?

Examples:

1. A school has a long-standing relationship with a provider to manage Duke of Edinburgh Award expeditions. The provider's staff often work with small groups of participants in school to prepare for the expeditions, and know the young people well. During most weeks of the summer term, one of these small groups goes away for one or two nights on an expedition. It is not practicable for a teacher to accompany these groups on all occasions, but the Headteacher is confident that the nature of the working relationship with the provider means that this is not necessary.

- a. When no teacher is able to accompany the group, full responsibility for the supervision, welfare and instruction of the young people is handed over to the provider. Provider staff therefore act as Visit Leader and Activity Leaders.
 - b. The school's agreement with the provider makes clear their respective responsibilities and the procedure to be followed in the event of an emergency (whether minor or serious) – the details of which depend on the remoteness of the expedition.
2. A children's home engages a provider to take small groups of children rock climbing at local venues during summer weekends and school holidays. At first, a worker from the home accompanies the groups, acting as Visit Leader while the provider takes on the role of Activity Leader.
- a. Later, after discussions with the provider, the worker and the young people, the home's manager decides that it is not always necessary for the worker to accompany the groups. On these occasions, the provider takes on both the role of Visit Leader and the role of Activity Leader.
 - b. The children's home has a plan in place to be able to respond in the event of an incident.

