

**Chapter 4 - The Overall Group Leader (or Visit Organiser)****SUMMARY OF KEY POINTS – see rest of chapter below for full details**

- **The Overall Group Leader is the main “Visit Organiser”, and is the person with overall responsibility** for the planning, management, supervision, and conduct of a visit.
- **Every offsite visit must have a named and specified Overall Group Leader.** If this role changes during a visit, a clear handover to a designated deputy should be made. The Deputy should be suitably experienced and competent to take over the role if necessary.
- **The Overall Group Leader must be assessed and approved as suitable and competent to fulfil their role and responsibilities by the Senior Manager/Headteacher.**
- **Being competent means that the Leader has demonstrated the ability to operate to recognised standards of good practice, and has sufficient relevant experience and knowledge of the group, the activity and the venue.**
- **Managers/Headteachers might reasonably expect new Overall Group Leaders or Deputy Leaders to have demonstrated their competence previously as Assistant Leaders** on several similar visits.
- **Staff who lead educational/offsite visits should record and regularly update details of their visit leadership qualifications, training, and experience on EVOLVE online.** This database enables managers to check staff qualifications/experience, and to make objective judgements regarding the competence of staff to lead visits.
- **Where a Leader wishes to lead an adventure activity, their competence should be confirmed by a robust verification process,** such as:
  - holding a National Governing Body leadership/coaching award at an appropriate level.
  - being "signed off" by a suitably-qualified Technical Adviser appointed by the employer.
- **The Overall Group Leader must use and follow their employer’s policies and guidance** (and relevant internal policies and procedures) when planning and leading visits.
- **The Overall Group Leader should be aware of their duty of care towards all group members,** and should fully understand their role and responsibilities as the visit leader.
- **The Overall Group Leader should ensure that visits are planned carefully beforehand and that risk assessments are suitable and sufficient.**
- **The Overall Group Leader should record and submit details of planned visits to all relevant managers,** and ensure that visits are correctly approved and authorised before departure.
- **Well-trained and experienced support staff should be able to lead visits under the direction and remote supervision of a teacher** (who will still have overall responsibility for the learning outcomes).
- **For further information, see also the following Outdoor Education Adviser Panel national guidance via the following webpage:**  
<https://oeapng.info/>

### 4.1 What is the role of the Overall Group Leader?

- The Overall Group Leader is the main “Visit Organiser”, and is the person with overall responsibility for the planning, management, supervision and conduct of a visit.
- Every offsite visit must have a named and specified Overall Group Leader. If this role changes during a visit, a clear handover to a designated deputy should be made.
- The Overall Group Leader must be assessed and approved as suitable and competent to fulfil their role and responsibilities by the Senior Manager/Headteacher.
- The Overall Group Leader of an offsite visit should normally – but not necessarily - be an employed member of staff. This is because an employee is directly accountable to the Manager/Headteacher and to the LA which, as employer, has overall health and safety responsibilities.
- The key requirements for Overall Group Leaders are that they must be accountable, and competent and confident to lead the visit/activity, not that they hold a particular post, title or job description.
- Being accountable means that the Leader has been engaged through an appropriate recruitment process, which includes vetting and induction into the establishment’s policies and procedures. The details of this process may depend upon whether the Leader is employed, contracted or acts as a volunteer, but in all cases should be thorough. In exceptional circumstances therefore, an adult other than an employed member of the staff may be the Overall Group Leader or take another lead role if deemed suitable and competent by the Manager/Headteacher, and the decision is supported by an appropriate risk assessment. It might be reasonable and acceptable therefore to delegate leadership and supervisory responsibilities to a competent staff member from another school/establishment or from an external provider (for example, the Holocaust Education Trust which arranges visits for sixth form students to Poland). In these situations, the Manager/Headteacher must be satisfied that the visit has been carefully risk assessed, the level of supervision provided is suitable and sufficient, contingencies are in place to provide additional support if required, and parents/guardians have given informed consent. The Manager/Headteacher should also delegate a suitably competent employee to be responsible for overseeing arrangements and ensuring that the school/establishment’s duty of care is fulfilled.
- Being competent means that the Leader has demonstrated the ability to operate to recognised standards of good practice, and has sufficient relevant experience and knowledge of the group, the activity and the venue. There are several ways of demonstrating competence. These include:
  - Providing evidence of holding relevant qualifications, including any specific qualification required by the law, the employer or the establishment (e.g. in First Aid).
  - Providing evidence of having undertaken appropriate training.
  - Providing verified evidence of relevant experience.
- Being confident means that the leader should not only be fully aware of their abilities, but also of their limitations.
- Specific additional competences are normally required for leaders of adventure activities and activities in outdoor environments, including Duke of Edinburgh Award expeditions, field studies, camping, and activities in or on water.

### 4.2 Do school visits have to be organised and led by a qualified teacher

- The status of staff is unimportant for the selection process – in a school, it could be a teacher, teaching assistant (TA), or another member of staff (e.g. administrative staff). However, the Manager/Headteacher must be satisfied that the member of staff is able to fulfil the educational purposes of the visit AND have the necessary character, skills, knowledge, experience, and competence to manage the visit and supervise the group safely and effectively. The visit leader should be knowledgeable and familiar with the school’s emergency procedures, and adequate communication and support systems should always be in place to obtain advice or summon additional help if necessary. A good knowledge of the pupils involved is also important, and they should have appropriate leadership and group/behaviour management skills.

- Well-trained and experienced support staff should be able to lead visits under the direction and remote supervision of a teacher (who will still have overall responsibility for the learning outcomes).
- Before leading offsite visits support staff will need:
  - a programme of induction to school policies and procedures;
  - a programme of training and apprenticeship to develop visit leadership and risk management skills;
  - a clearly identified monitoring, assessment, and feedback system which records clearly the level of responsibility which should be given to a staff member – including when they are considered competent to lead visits independently.
- Because the visit contributes to the school curriculum and education of the pupils involved, the situation should be treated as a form of remote supervision. This means that the qualified teacher who is responsible for the pupils' learning programme must retain overall responsibility for the arrangements and conduct of the visit. Appropriate access to the teacher in charge (or designated deputy) should be maintained throughout the visit – for example, the teacher in charge should normally remain in school, and contactable by phone, until the group returns.

#### 4.3 Expected qualities of the Overall Group Leader

- Manager/Headteachers should be confident that the Overall Group Leader is competent to supervise and oversee all those in their care safely and effectively.
- Leader competence and suitability derive from:
  - good leadership and group/behaviour management skills;
  - wisdom, common sense, and sound judgement;
  - personal qualities, such as reliability, patience and calmness;
  - an awareness of hazards and alertness to safety issues;
  - an ability to carry out a dynamic re-assessment of situations, where necessary;
  - an appreciation of one's own and the other leaders' abilities, roles and limitations;
  - good organisational and risk management skills;
  - experience of the environment to be visited and activities involved;
  - experience of leading similar offsite visits;
  - an understanding and appreciation of the educational objectives involved;
  - good working relationships with the young people and other staff involved;
  - knowledge and understanding of the young peoples' abilities and needs;
  - appropriate skills and training in activities and environments;
  - appropriate skills and training in first aid and crisis management;
  - relevant qualifications;
  - knowledge and understanding of school policies and procedures;
  - relevant checks regarding child protection issues.
- Whilst a degree of competence can reasonably be assumed from specific qualifications, such as "Qualified Teacher Status", or a relevant coaching qualification, it is important that other factors, such as experience and personal qualities, are also taken into consideration.
- Suitability is a matter of judgement of the character, attitude, and experience of the person to undertake the required level of supervision. It assumes a mature and responsible outlook, and general conduct and behaviour that are appropriate and acceptable.
- Managers/Headteachers might reasonably expect new Overall Group Leaders or Deputy Leaders to have demonstrated their competence previously as Assistant Leaders on several similar visits.
- Managers/Headteachers should ensure that new staff receive appropriate training and gain experience of assisting with the leadership of visits (where they can observe and learn skills from other more experienced staff) before being considered suitable to organise and lead visits themselves. It may be helpful to provide new staff members with their own experienced "mentor" who can help them gain the experience and competence they need. In schools, newly qualified teachers (NQTs) are required to attend a Visit Planning and Leadership training course provided by the Local Authority so that they can be introduced to the Council's policies and procedures, and obtain practical instruction regarding how to plan and manage visits safely and successfully.

- Managers/Headteachers should normally require Overall Group Leaders and Deputy Leaders of more complex and demanding visits (e.g. ski visits or overseas expeditions) to have considerable previous leadership experience and relevant training/qualifications.
- Where a Leader wishes to lead an adventure activity, their competence should be confirmed by a robust verification process, such as:
  - holding a National Governing Body leadership/coaching award at an appropriate level.
  - being "signed off" by a suitably-qualified Technical Adviser appointed by the employer.
- Managers should check the level of qualifications required by each activity's National Governing Body (see Appendix VGA 8.1 – "Adventure Activity Staffing Requirements") and may need to seek further advice from the LA Educational Visits Officer or other appropriately qualified individuals.
- Managers should ask staff who organise and lead visits to record and make available to them the following information – preferably in their own personal records section on EVOLVE Online - so that the information is accessible online to all managers:
  - Leadership experience: staff should record the approximate number of visits that they have been involved in as either Overall Group Leader or Deputy/Assistant Leader. This provides a useful record of group leadership experience.
  - Qualifications and training: details of relevant qualifications and training courses attended (e.g. First Aid, Minibus Driving, Risk Management, Ski Course Organiser) should be recorded, and those responsible for approving visits or staff training should periodically check that qualifications are still current and valid.
  - Registered Adventure Activity Providers: the LA records whether leaders who have specialist outdoor qualifications have been approved by the Local Authority to instruct the activities in which they are qualified. The Manager/Headteacher and EVC (if applicable) should ensure that staff only instruct those activities for which they are appropriately qualified (further advice can be obtained from the County Educational Visits Officer).

#### 4.4 What are the responsibilities of the Overall Group Leader?

The Overall Group Leader should normally:

- use and follow the Local Authority Offsite Visits Leader Guidance and any relevant internal policies and procedures in planning and preparing for a visit (N.B. in most cases, the employer will be the Local Authority, and employees should know how to access and refer to these Guidelines, and how to obtain further information and advice if required. Academies and some other establishments are independently employed, but those which have an Educational Visits Service contract with the Local Authority, are also contractually obliged to follow the Local Authority Offsite Visits Leader Guidance.
- appoint a competent deputy, in conjunction with the Manager/Headteacher and/or EVC (if applicable), if working with one or more other adults;
- appoint a sufficient number of suitable and competent Assistant Leaders and Adult Volunteers to adequately supervise the group;
- ensure that child protection issues are addressed (e.g. vetting including DBS checks).
- ensure that if the staff team includes someone with a close relationship to a member of the group, there are adequate safeguards so that this will not compromise group management.
- ensure that sufficient time is available and given to organise the visit properly;
- follow the special guidance for exchange visits and overseas expeditions;
- carry out all the necessary planning and preparation before the visit, including an inspection visit (where feasible and appropriate) and full risk assessments;
- carry out appropriate checks on any external service providers to ensure that the services they provide are acceptably safe and suitable;
- have enough information about the group members to assess their fitness and suitability to undertake the planned activities, or be satisfied that their suitability has been assessed and confirmed;
- ensure all activities are suited to the age, aptitude and experience of all participants;
- ensure the mode of travel is acceptably safe and appropriate, and procedures comply with Local Authority Guidelines;
- ensure that appropriate emergency home contacts (24 hr/7 day) are appointed to handle enquiries and co-ordinate emergency procedures;

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- ensure that matters of insurance and finance are adequately covered;
- maintain appropriate levels of supervision and supervision styles;
- ensure that adventure activities are led and instructed by appropriately qualified and experienced staff, and where applicable, with the correct AALS licence;
- check that any specialist equipment used is suitable for the activity undertaken, well maintained and in good working order, and that any defects or losses are reported and corrected;
- be aware of safeguarding issues, and ensure that adequate safeguarding procedures are in place;
- brief all accompanying staff and volunteers fully regarding all aspects of the visit, including their roles and responsibilities, emergency procedures, and agree details of the risk assessment.
- ensure all tasks have been assigned, and arrange any additional training necessary to accompanying staff and volunteers;
- provide full written information to parents or carers, and obtain their fully informed consent;
- prepare and brief young people and their parents fully regarding all aspects of the visit;
- ensure all Leaders are aware of any additional needs or medical issues, and appropriate action or support needed;
- manage the overall organisation during the visit, including staff leadership, supervision of young people, and have due regard for the health/safety/welfare of everyone at all times;
- be able to facilitate continuous and on-going risk assessment for the duration of the visit or activity, and be prepared to stop the visit or activity if appropriate;
- be able to initiate an alternative “Plan B”, or cease all activity and return to school or base;
- be conversant with, and ensure good practice in planned activities, including those activities that are not directly led or delivered by the Group Leaders;
- ensure that there is adequate first aid provision, in terms of equipment and trained personnel;
- provide the Manager/Headteacher and EVC (if applicable) with all relevant information and documentation, and obtain the necessary visit approvals and authorisation;
- obtain additional expert advice and guidance where required;
- carry all relevant documentation including emergency procedures;
- ensure that relevant Group Leaders and the Emergency Home Contact have the names of all group members, and the contact details of all group members’ next of kin;
- ensure there is a contingency plan for any delays including a later return home;
- have an effective and tested communication system between Group Leaders, and with the Emergency Home Contact, in the event of an emergency or delay;
- ensure that adequate provision is made for young people who finish an activity outside normal establishment hours and have to travel home late, especially after dark;
- report all significant accidents, incidents or near misses in accordance with the procedures outlined in the Accident and Injury Reporting Procedure. All records of significant accidents/incidents to young people should normally be kept until the person that was injured is aged 21. It is sensible therefore to state on each record the age and date of birth of the person concerned, and store records according to the date when they can be destroyed. All accidents to employees must also be recorded and be kept for a minimum of five years (this allows for a 3 year legal requirement and some additional lee-way);
- carry out a review of visits with the Manager/Headteacher or EVC (if applicable), report significant findings to all those responsible, and adapt future practice as a consequence;
- advise the Manager/Headteacher/EVC/Local Authority of any significant material change to an offsite visit that has already been approved.