

Unit 24: Health and Safety Factors in Outdoor Learning

Level: **3**

Unit type: **Internal**

Guided learning hours: **60**

You can click in this box to go to the introductory section for our delivery guide. This provides an overview of:

- **The BTEC National Sport (2019) qualification suite, including the four pathways and links to occupational standards**
- **Employer engagement**
- **Incorporating Blended Learning**
- **Our support offer**

Approaching the unit

Due to requirements from government regulatory bodies and other accrediting organisations it is essential that providers of outdoor activities keep up to date with their legal requirements. This unit enables learners to understand the health and safety implications of participating in and delivering outdoor activities. The unit will explore the key factors that influence health and safety in the provision of outdoor activities. Learners will then investigate how to maintain safety and quality when delivering outdoor activities and implement risk assessments and session planning in preparation.

There are a number of key factors which influence health and safety of outdoor activities from current legislative factors to current legal factors. It is important that learners are aware of the implications. There are a number of regulatory bodies involved in supporting the provision of outdoor activities, learners should be aware of the core ones. They should also be aware of the influences that affect the delivery of outdoor activities from statutory requirements to those that are undertaken as good practice.

An important role of an outdoor activity instructor is being able to maintain not only safety but also the quality of delivery. The outdoor sector has a wide range of procedures that varies in different organisations and across the sector but are underpinned by the key factors. These procedures include operational ways of working, safety procedures and general good practice. Having effective procedures is not just about keeping everyone safe but also ensuring there is a high level of quality.

An outdoor activity instructor needs to be able to carry out risk assessments and plan sessions in preparation for participation in outdoor activities. Risk assessments vary across the sector however the core concepts are the same. An instructor needs to be able to identify the hazards, the control measures and give a calculated risk factor with regards to the operation. A key part of making

sure that outdoor activities are delivered safely is to ensure that they are planned. An instructor needs to be able to plan an outdoor activity session that outlines what they are trying to achieve. Following the writing of risk assessments and session plans, the learner will need to review their strategy and identify areas for improvement.

This unit could be delivered by using a mix of theory (to introduce learners to the topics listed in the unit content), visits, guest speakers (to enable learners to apply the theoretical concepts they have learned) and practical sessions.

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Delivering the learning aims

Learning aim A

This learning aim centres on the key factors that influence health safety in the provision of outdoor activities.

Learners should investigate the impact of key legislation on the provision of outdoor activities. This should include health and safety legislation (i.e., health and safety at work, RIDDOR, PPE, COSHH, First Aid, Manual Handling, Fire Safety), children and young people, keeping children safe in education, equality and diversity. Learners should know about the different types of legislation what they are and their purpose. They should then relate these to the provision of outdoor activities.

Learners must be familiar with current practices in the working environment and understand the importance of following legislation, practices and procedures. They should be made aware of the legal factors which affect outdoor provisions operations. This should include law (i.e., statutory, civil and case), in loco parentis, duty of care and negligence. This should be delivered as an overview with specific examples used to illustrate how it impacts outdoor activity provision.

Regulatory bodies play an important part in making sure that the provision of outdoor activities is maintained to a high standard. Learners need to investigate the regulatory bodies involved in the sector and the key factors that influence the delivery of outdoor activity provision. They should have a good overview of all areas but then focus on the key ones that impact the day to day delivery. They should be made aware of statutory and non statutory factors and the different influences this has. To give this focus they may consider using a specific outdoor provider as a case study as not all deliverers will be impacted by every influence (i.e., some centres are not applicable for an AALS licence).

Learners should be able to give examples of how conforming to statutory and non statutory will affect different stakeholders such as employers, employees and participants.

Learners would benefit to have the opportunity to observe or speak to staff working in the management of outdoor provision. It would be useful for them to discuss how they follow relevant legislation, how they report and record procedures and how they manage risk. Centre visits will enable learners to observe these legislations, policies and procedures and how they impact staff and customers.

Learning aim B

This learning aim examines the management of health and safety in the provision of outdoor activities. It looks at the responsibilities of a manager in the management of health and safety. Learners should have the opportunity to observe or speak to staff working in the provision of outdoor activities and focus on the way they follow relevant legislation, reporting and recording procedures. Learners must be familiar with current practices in the working environment and must understand the importance of following legislation, practices and procedures. Centre visits will enable learners to observe these legislations, policies and procedures and how they impact stakeholders.

Procedures that promote safety and quality in outdoor activities cover a wide area. Learners should be encouraged to focus on applying this to a particular case study where they can see the context. They should be aware of the different areas that are applied in operating procedures and be able to give examples of what this may look like and the purpose of its inclusion (i.e., insurance, what type and to what level?).

Safety procedures and protocols need to be followed when delivering the provision of outdoor activities. Different organisations will have procedures that meet the setup and requirements of their operations. Learners need to have an overview of what these would look like and the guideline a centre would follow. Contextualising this is important to make sure that the learner understands the principles. They would be expected to be able to give examples around a particular activity and how this activity is managed to maintain a safe working environment (i.e., sail training at a water sports centre; would have RYA guidelines to follow, equipment of a certain standard and local requirements to meet).

Alongside the statutory requirements, providers of outdoor activities in the sector follow many good practice guidelines. This would be supported by visiting a centre or having an external speaker. Learners need to be aware of an overview of these areas and how they support a centre to meet its statutory and beyond requirements in safety and quality of delivery. Learners should investigate for a specific case study some of the areas of good practice that are followed and applied to an organisations operations.

Learners need to be able to articulate the importance of following procedures both statutory and non statutory. They should be able to explain with examples the reasons behind why an organisation has certain procedures, policies, accreditation or follows good practice in a particular area.

Learning aim C

Having looked at the procedures that promote safety and quality in the delivery of outdoor activities learners need to know how to carry out some of the preparation work in risk assessing and planning activities. Learners may cover some of this area when undertaking national governing body qualifications.

Learners need to know how to assess the risks of delivering outdoor activity provision. Whilst they should have an overview of many areas, focusing on certain specific activities or areas of delivery would support a more in-depth understanding of the process required(i.e., undertaking practical sessions should be a core part of learners being aware of the different hazards and control measures involved. They should be able to calculate a risk factor that will determine whether the activity or action should go ahead. The learner should be made aware of different formats used, specifically looking at the risk benefit analysis used by many providers.

Session planning is an important part of an outdoor activity instructors skill set. Learners need to be able to see session plans which have been written and then put into action. The session plans should include; activities, equipment required, ratios, instructor qualifications, emergency procedures, location of delivery, roles and responsibilities and a contingency plan. There is no set template for the session plan, learners could be encouraged to develop their own or use a centres plan for continuity. Learners should have the opportunity to put their session plan into practice where possible. Following the development of a risk assessment and session plan, learners should be encouraged to review these. This could be effectively achieved by working with a peer or in small groups. They could also get feedback from an employer or sector expert. The review should focus on the strengths and areas of improvement.

Transferable skills

Preparing for work

Developing practical and technical skills

Legislation, regulations, policies and procedures

Managing information

Key teaching areas in this unit include:		
Sector skills	Knowledge	Transferable skills/behaviours
<ul style="list-style-type: none"> • Communicating with colleagues and stakeholders • Displaying appropriate skills and behaviours • Applying knowledge to real-world situations • Producing real-world documents 	<ul style="list-style-type: none"> • Barrier and benefits of participating • Researching legislation, legal factors and regulatory bodies • What constitutes a risk assessment • Good practise • Safe delivery 	<ul style="list-style-type: none"> • Communication • Working with others • Thinking skills/adaptability • Problem solving • Management of information • Self-management and development

Employer involvement

This unit would benefit from employer involvement in the form of:

- Visits (virtual visits) to centres where outdoor activity takes place
- Work placement or shadowing where learners can get first hand experience of using outdoor activity provision in real world situations
- Sector experts (face to face or virtually) can be used as witnesses who can help with areas of assessment with guidance
- Sector experts (face to face or virtually) could be used to deliver in their areas of expertise

Assessment guidance

These are only suggestions, and assessor can utilise professional judgment, to support this please consider the selection cited within' key summary of the types of evidence used for BTEC Nationals' in Appendix 1 of the spec. Where unsure on use or considering different method utilise the 'ask the expert service'.

This unit is internally assessed. Learners will be required to produce two assignments. There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aim: B (B.P3, B.P4, B.M2, B.D2)

Learning aim: C (C.P5, C.P6, C.M3, C.M4, C.D3)

Example assessment strategies

Learning aim A – Verbal podcast evidence that demonstrates an understanding of the key legislation, legal factors and regulations that influence the outdoor sector.

Learning aim B – Presentation poster that shows advanced knowledge and understanding of various procedures put in place to protect participants and colleagues when taking part in outdoor activities.

Learning aim C – Risk assessment detailing appropriate risk factors and control measures, session plan with evidence of appropriate planning procedures.

Delivering the unit: suggested activities

This provides you with a starting place for one way of delivering the unit, based around the recommended assessment approach in the specification.

Learning aims / topic areas	Suggested Activity	Suggested time allocation
<p>A1 Key factors that influence health and safety</p> <p>A2 Regulatory bodies</p>	<p>Introduce learners to an overview of the key factors in terms of health and safety decisions in outdoor activities and how this influences the delivery. This could be completed by using a specific provider of outdoor provision and how they operate. This could be internally with own centre set up or externally through a local, regional or national organisation.</p> <p>Learners need to be aware of the current legislative and legal factors that affect a provider of outdoor activities operations and the regulatory bodies who ensure these are in place. This could be done through a class discussion, a guest speaker (such as a manager of an outdoor provider facility) or a centre visit. Learners need to be aware of the key legislation relating to health and safety, interpreted in the context of a provider of outdoor activity delivery.</p> <p>Following learners awareness of legislations, legal factors and regulatory bodies affecting the development of the outdoor sector, learners should develop further understanding. Ask the learners to work in pairs; allocate each pair a legislation, legal factor and regulatory body. Learners should consider the purpose of each area, what it is and the impact it has on the outdoor sector and also the consequences of non-compliance. The pairs should produce a PowerPoint presentation that they can deliver to the group in the next lesson.</p>	<p>6 hours</p>
<p>Key factors that influence the delivery of outdoor activities</p>	<p>Learners should next be introduced to the key factors which influence the delivery of outdoor activities. Learners should know the difference between statutory and non statutory. They should be aware of a number of different organisations and accreditations. This could be completed by learners researching a specific organisation and identifying what that provider has in place. A guest speaker from an organisation(s) would give good context to what is followed and why.</p>	<p>4 hours</p>

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	<p>Discuss with the learners the term 'good practise' and why outdoor providers will have in place both statutory and non statutory guidance. Learners should be aware of the impact of this guidance both beneficial and challenging to an outdoor providers operations, the employees and participants. Learners could work in pairs and take either an outdoor provider or key factor and research the particular impact of that area. They could then share this back with the group.</p>	
All content in topic A	<p>Revision session - learners should use this lesson to revise the topics covered in topic A. They should independently research and prepare notes for the assessment on this topic.</p>	2 hours
<p>B1 Procedures that promote safety and quality</p> <p>B2 The importance of following procedures</p>	<p>Having developed an understanding of the regulations and guidelines behind delivering outdoor provision. Learners need to understand what procedures are in place to ensure outdoor providers are compliant and follow good practice. Whilst learners would not be expected to be able to produce a fully detailed operating procedure they would need to be aware of what would be included in an operating procedure, its use and why it is important.</p> <p>The best way to introduce operating procedures is for learners to first of all research what may be included, they could discuss any experience they may have had. Following this learners should be introduced to some different operating procedures, this could include internal set ups or external. They should be made aware of the key areas that would be included and be given examples relating to each procedures use.</p> <p>Learners will benefit from this area of study being contextualised. You could introduce this learning aim by arranging a visit to a local outdoor activity facility/centre. Arrange for an activity leader or manager to share information about best practice in the sector. It would be useful if they explain how they follow internal and external procedures, their work with governing bodies (if applicable) and how legislation affects what they do. It would also be useful if they discuss how they comply with equipment competency to ensure participants' safety.</p> <p>Next, you could recap the learner's findings from visits. How are participants kept safe in outdoor activities?</p>	2 hours

	<p>You could arrange for a guest speaker to come in and discuss how best to respond to an emergency in an OAA setting. The guest speaker should be a first-aid trained OAA leader. Learners need to understand the role of the first aider and the procedures they need to follow in the event of an emergency. They need to understand the importance of updating information about your location when working/participating in the outdoor environment.</p> <p>Finally, the learners could be set a task where they work in pairs and create a poster that highlights the importance of following procedures and how it keeps employers, employees and participants safe and ensures a high level of quality.</p>	
<p>All content in topic B</p>	<p>Revision session - learners should use this lesson to revise the topics covered in topic B. They should independently research and prepare notes for the assessment on this topic.</p>	<p>2 hours</p>
<p>C1 Risk Assessment planning</p>	<p>Introduce the learners to this area by discussing how the learners have participated in different outdoor activities and the preparation that is required for learners to be able to participate safely and develop skills and techniques. Ask the learners if they have seen risk assessments or session planning before. Have a group discussion on what these might look like. It is strongly recommended that learners are taught about risk assessments practically as well as theoretically Where possible learners should identify the hazards from actually participating in the activity.</p> <p>Discuss with the learners what constitutes a hazard. Get the learners to come up with examples from participating in different outdoor activities and who is at risk and why. Discuss further with them what controls might be in place to lower the level of risk. Introduce risk factors, severity and likelihood. Use some examples to show how risk factors are applied. Finally discuss with the learners the benefits of the activities, how this is factored in against the level of the risk factor.</p> <p>In pairs, ask learners to look through examples of risk assessments and identify common themes and any areas that don't make sense. Using their experience from practical activity and research ask learners to produce a risk assessment for a selected outdoor activity using either a purpose made template or agreed design. The risk assessment should be focused and may not cover every hazard but should cover any hazard and subsequent actions in detail. Complete this activity by discussing the learners' findings, what needs to be done in a risk assessment and the need for a contingency plan (contingency column on the risk assessment document must be included). Check learners have understood the importance of</p>	<p>6 hours</p>

	risk assessments and contingency planning and that they are confident creating a risk assessment.	
C2 Session planning	<p>Learners need to be able to complete a session plan for an outdoor activity. Depending on the timing of this, it could be included with unit D4. Learners should complete the session plans on the understanding they could be used in a real world situation.</p> <p>Discuss with the learners what they understand by the term session planning. Further, develop this by asking the learners what should be included in a session plan. Create a brainstorming activity that highlights the key areas required.</p> <p>Give the learners some examples of session plans, ideally in different formats. Get the learners to check their understanding of the session plan and whether they can follow what is required. Reinforce that a session plan is not always for an individual but also so an external person knows what is going on.</p> <p>Work with the learners to create a session plan template or introduce one you would expect them to use. Ask the learners to choose an outdoor activity, location and participant type. These should be based upon the activities that the learner would deliver in D4. Learners to then complete a session plan which breaks down the activities and covers the main topic areas highlighted previously.</p>	6 hours
C3 Reviewing planning strategies	<p>Learners should be made aware that at the beginning of a career as an outdoor instructor they will be expected when undertaking qualifications or training to show their understanding, knowledge and application of producing risk assessments and session plans.</p> <p>Ask the learners to work with peers and review the risk assessment and session plans they have created. This should focus on the strengths and areas for improvement.</p> <p>Learners to then highlight the key findings from this and in pairs share this with the group.</p> <p>To make sure that the session plans and risk assessments are suitable for use, learners to submit adapted versions to be looked at by either the tutor or a sector expert such as an employer.</p>	4 hours
All content in topic C	Revision session (2 hours): learners should use this lesson to revise the topics covered in topic C. They should independently research and prepare notes for the assessment on this topic.	2 hours

Details of links to other BTEC units and qualifications

Several other units from this qualification complement this unit. These include:

Unit D4: Applied Leadership and Instructing in Outdoor Activity
Unit 1: Sport Development
Unit 6: Sporting Injuries
Unit 25: Outdoor Activity Provision
Unit 27: Expedition Experience

Resources

The 2019 qualifications are industry-focussed and it is key that learners maintain up to date understanding and also visibility of key developments and influences within the market.

Social Media

Add here named examples and types of individuals/bodies to follow. Collate under platform headings (i.e. twitter, Instagram, podcasts etc)

Twitter

<https://twitter.com/IOLOutdoorProfs>

<https://twitter.com/FSAForestSchool>

<https://twitter.com/theoeap>

<https://twitter.com/AHOECUK>

<https://twitter.com/CLOtC>

<https://twitter.com/MtnTraining>

<https://twitter.com/rya>

<https://twitter.com/BritishCanoeing>

Websites

<https://www.aaiac.org/>

<https://www.lotc.org.uk/>

<https://www.outdoor-learning.org/>

<https://ahoec.org/>

<https://ukoutdoors.org.uk/>

<https://www.hse.gov.uk/aala/aals.htm>

<https://www.britishcanoeing.org.uk>

<https://www.rya.org.uk>

<https://www.thebmc.co.uk>

<https://www.mountain-training.org>

<https://www.thebapa.org.uk>

<https://adventuremark.co.uk/>

<https://www.lotc.org.uk/>
www.hse.gov.uk

Textbooks

Bates, B. (2016) Learning theories simplified. London: Sage

Bilton, H. (2010) Outdoor Learning in the Early Years. Third Edition. Oxon: Routledge

Kolb, D. A. (2015) Experiential Learning – Experience as the source of Learning and development, 2 nd edn. Pearson education: New Jersey

Crosbie J (2014) The value of outdoor education for people with disabilities: An in-depth case study of the Calvert Trust. Doctoral/PhD. University of Edinburgh.

Humberstone B, Stan I (2011) Outdoor Learning: Primary Pupils' Experiences and Teachers' Interaction in Outdoor Learning. Education 3-13. 39: 529-540.

Humberstone B, Stan I (2012) Nature and Well-Being in Outdoor Learning: Authenticity or Performativity. Journal of Adventure Education and Outdoor Learning. 12: 183-197.

GREENAWAY, R. (1996) Reviewing Adventure. Why and How? Penrith, NAOE

Ogilvie, K., (2005) Leading and Managing Groups in the Outdoors: (2nd Revised edition) publisher: Institute for Outdoor Learning [Paperback] Paperback – 16 Jun. 2005

Ogilvie, K., (2013) Roots and Wings - A history of outdoor education and outdoor learning in the UK Russell House Publishing

HOPKINS , D. AND PUTNAM , R. (1993) Personal Growth Through Adventure. London: D. Fulton.

Barton, B., (2006) Safety, Risk and Adventure in Outdoor Activities Paperback – Illustrated, 15 Nov. 2006

BARRETT, J. AND GREENAWAY, R. (1995) Why Adventure? The Role and Value of Outdoor Adventure in Young People's Personal and Social Development. Foundation for Outdoor Adventure,

EWERT, A. (1989) Outdoor Adventure Pursuits: Models Foundations and Theories. Columbus, Ohio: Publishing Horizons Inc

MILES, J. AND PRIEST, S. (EDITORS) (1990) Adventure Education. State College: Venture Pub.

MORTLOCK, C. (1988) The Adventure Alternative. Milnthorpe: Cicerone Press

Williams R (2013) Woven into the Fabric of Experience: Residential Adventure Education and Complexity. Journal of Adventure Education and Outdoor Learning. 13: 107-124.

Waite, S. (2011) Children Learning Outside the Classroom From Birth to Eleven. London: SAGE Publications Ltd

Definition of key terms

Risk Assessment – Risk assessments are part of the risk management process and are included in the Management of Health and Safety at Work Regulations. A risk assessment is the process of identifying what hazards currently exist or may appear in the workplace. A risk assessment defines which workplace hazards are likely to cause harm to employees and visitors.

Outdoor Activity Instructor - An Outdoor Activity Instructor supervises and guides children and adults in activities and pastimes such as canoeing, sailing, climbing, surfing, cycling, hillwalking, archery, bushcraft, rock pooling, geology, plant identification, habitat or wildlife walks at an introductory level. They will be supervised while working in a limited range of venues and weather conditions following tightly defined operating procedures

Outdoor Professional - Outdoor learning professionals provide safe activities and

effective learning in the outdoors for the benefit of individuals, communities, society and the economy. They are trained, experienced and uphold the values and behaviours that help others adventure in their environment, gain skills and make a positive difference for our world. Professionals in outdoor learning may volunteer, work full-time or part-time to positively impact areas such as sports participation, outdoor education, youth development, wellbeing, workforce training or adventure tourism.

Outdoor Provision and the Sector – the most up to date information on the outdoor sector and its provision can be found in the report by Sport England and the Outdoor Industries Association. The report was commissioned by Sport England and produced in partnership with the Outdoor Industries Association. It examines the demand and supply of outdoor provision and takes an in-depth look at the profile of the outdoor consumer, taking account of demography, motivation, participation and provision in outdoor sport and recreation in England. The report can be found here: [outdoors-participation-report-v2-lr.pdf \(sportengland-production-files.s3.eu-west-2.amazonaws.com\)](https://www.sportengland-production-files.s3.eu-west-2.amazonaws.com/outdoors-participation-report-v2-lr.pdf)

Outdoor Learning - Outdoor learning is an umbrella term for actively inclusive facilitated approaches that predominately use activities and experiences in the outdoors which lead to learning, increased health and wellbeing, and environmental awareness.

UK Outdoors - UK Outdoors creates one voice and the best support for individuals and organisations in the outdoor learning and adventure world. UK Outdoors is the industry body for outdoor learning, representing over 5000 individuals and organisations in the outdoor & environmental education and adventure world. To be renamed as Outdoor Learning Association.

AALS - Adv-RMS provide the inspection element of the licensing process on behalf of HSE. They carry out an examination of applicants' Health and Safety policies and procedures as well as any other relevant documents, carry out site inspections and make licensing decisions.

HSE - as the Adventure Activities Licensing Authority, provides the administrative function of the licensing process. This is coordinated by HSE's Licensing and permissioning team.

AAIAC - the Adventure Activities Industry Advisory Committee, is the sector's lead body for safety in adventure activities. It is representative of a wide range of stakeholders from the UK adventure activities sector and is supported by the Institute for Outdoor Learning.

Institute for Outdoor Learning - The Institute for Outdoor Learning is the professional body for individuals and organisations using activities and experiences in the outdoors for learning, increased health and wellbeing and environmental awareness. We advance professional standards, research and guidance, and are driven by a vision of Outdoor Learning as a highly valued form of development, education and employment in UK society.

AHOEC - The AHOEC is an association of leaders in outdoor learning – most of these leaders hold senior positions in outdoor education provision across the UK. Members come from statutory, private and charity sectors as well as the wider educational community. The AHOEC is committed to championing high quality outdoor learning at all levels, from influencing decision makers to introducing young people and their families to new outdoor activities. We strive to create and develop a healthy culture intelligently balancing education, fun, safety, risk, inclusion, challenge and adventure.

British Activity Providers Association - The British Activity Providers Association has over 30 years experience of working with providers of school activity courses, adventure activities, day camps and other activity providers. It is the trade association run by providers for providers and their customers. It is acknowledged, respected and consulted by members of the outdoor industry, relevant Government departments, regulatory bodies and the media.

Learning Outside the Classroom - The LOTC website which provides information, advice and guidance designed to help schools, educational practitioners and others working with young people to plan, run and evaluate exciting and challenging LOTC activities. The LOTC Quality Badge. This is a national accreditation recognising organisations that provide good quality educational experiences and manage risk effectively. Supported by the majority of Local Authority Outdoor Education Advisers, the LOTC Quality Badge makes it easier for anyone organising educational visits to gain approval and provides assurance that their chosen destination has met 6 nationally recognised quality indicators.

AdventureMark - Adventuremark is a non-statutory safety scheme devised by the Adventure Activity Industry Advisory Committee (AAIAC) for providers of adventurous activities that are outside the scope of the Adventure Activity Licensing regulations. AAIAC, have appointed Adventure Activity Associates Ltd. as the Supervising Body responsible for operating Adventuremark.

Stakeholders – people who have an interest or concern about a project or development. They are often from businesses and sports organisations but can include members of the public, community leaders, local councillors, members of government bodies and investors. Stakeholders have a vested interest in the project or development going ahead, it is adapted or it being stopped.