

# Outdoor Activity Instructor Apprenticeship, Level 3

## End-point Assessment Plan

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## Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the Outdoor Activity Instructor level 3 apprenticeship standard. It is written for end-point assessment organisations (EPAO) who need to know how EPA for this apprenticeship must operate. It will also be of interest to outdoor activity instructor apprentices, their training providers and employers.

All apprentices must spend at least 12 months on-programme. All apprentices must complete the required amount of off-the-job training specified by the apprenticeship funding rules.

The EPA must be completed over a maximum total assessment time of 3 hours and 45 minutes, within a maximum 2 month period, after the apprentice has met the EPA gateway requirements.

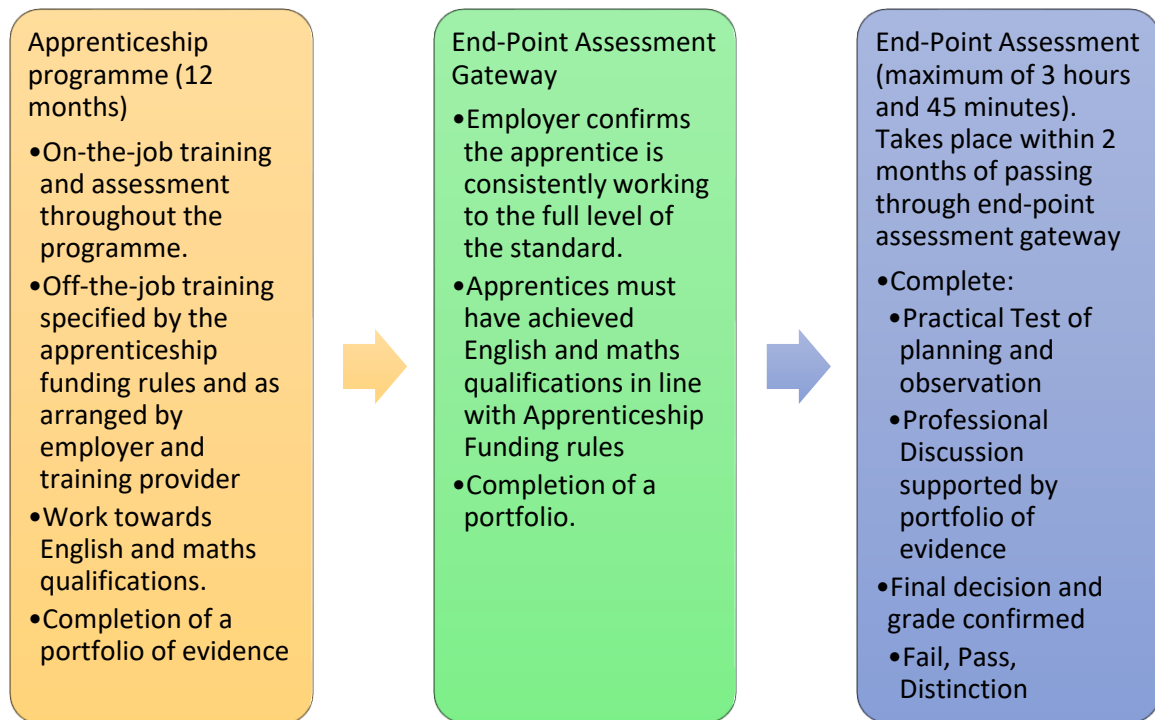
The EPA should only start once the employer is satisfied that the apprentice is consistently working at, or above, the level set out in the standard, the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPAO. As a gateway requirement, apprentices must compile a portfolio of evidence. In addition, the apprentice must have achieved English and maths qualifications in line with the apprenticeship funding rules.

An approved EPAO must conduct the EPA for this apprenticeship. Employers must work with the training provider to select an approved EPAO from the apprenticeship providers and assessment register (APAR).

The EPA consists of two distinct assessment methods:

- Practical test
- Professional discussion supported by a portfolio of evidence

Diagram 1. Typical outdoor activity instructor apprenticeship



## End-Point Assessment Gateway

The EPA should only start once the employer is confident that the apprentice is consistently working at or above the level set out in the standard, the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPAO. Employers may wish to take advice from their apprentice's training provider(s).

Gateway requirements:

- Achieved English and maths qualifications in line with the apprenticeship funding rules.
- Completion of portfolio of evidence to support the professional discussion.

The employer must ensure that the apprentice is ready for the EPA. The apprentice should know what to expect and be familiar with the different assessment methods that they will undertake.

To help an apprentice prepare for EPA, a formal discussion is recommended with their employer and, where appropriate, a representative from the apprentice's training provider may also be present. The aim of the formal discussion will be to review the apprentices' progress whilst on the apprenticeship programme and to identify whether they are ready for EPA. This formal discussion may be part of an existing appraisal process.

## The End-Point Assessment Model

An approved EPAO must conduct the EPA for this apprenticeship. Employers must work with the training provider to select an approved EPAO from the apprenticeship providers and assessment register (APAR).

Performance in the EPA will determine the apprenticeship grade of fail, pass, or distinction.

Achievement of the apprenticeship will depend on apprentices being required to successfully complete 2 distinct assessment methods:

- Practical test.
- A professional discussion supported by a portfolio of evidence.

### End-Point Assessment Processes

The EPA must be completed within a maximum period of 2-months, after the apprentice has met the EPA gateway requirements.

The assessment methods can be completed either on the same day or in sections over different days (making a maximum total of 3 hours and 45 minutes) to best fit the needs of the employer, the apprentice and the independent assessor. Wherever possible, completion of the practical test - observation and question and answer, and professional discussion over the course of one-day is the preferred option.

The assessment methods must be completed in the order set out below.

### Time required for assessment

The requirements for each assessment method are shown below.

A full breakdown of the knowledge, skills and behaviours to be assessed by each assessment method is in Annex A.

Assessment Methods	Timing
1: Practical test	
Completion of a Session Template	Apprentices must complete the session template no earlier than one week immediately prior to the observation.  Duration of 60 minutes (+/- 10% at the discretion of the independent assessor)
Questions & answers	To be undertaken following completion of the session template.

Observation	Duration of 15 minutes (+/- 10% at the discretion of the independent assessor)
	Duration of 90 minutes (+/- 10% at the discretion of the independent assessor)
Questions & answers	To be undertaken after the observation. Duration of 15 minutes (+/- 10% at the discretion of the independent assessor)
2: Professional discussion supported by a portfolio of evidence	Duration of 45 minutes (+/- 10% at the discretion of the independent assessor). This should preferably be undertaken on the same day as the observation.

## Assessment Method 1: Practical Test

### Part 1 – Single Session Template

*(Preparation in work time prior to observation for 60 minutes)*

- The apprentice will be required to complete a written session template for the session that they will be observed on. The session is to be chosen with the agreement of the employer, the independent assessor and the apprentice.
- The session template must include as a minimum:
  - The organisations procedures and standards relevant to the session.
  - The session activity type and timings.
  - The desired outcomes of the session.
  - Information about the participants.
  - The required resources, equipment, allocated venue and weather conditions.
  - Approach to be taken to achieve required outcomes.
  - Options for adapting the session to respond to dynamic changes in environmental hazards.
  - Details that will be included within the session briefing.
  - Two approaches that may be used to aid participant engagement and participation.
  - Two questions that may be used to check understanding and progression of learning.
  - Two techniques or questions that will be used to help participants review the session against the desired outcome.
  - How environmental impact will be minimised and sustainability supported.

- How the venue is to be left and resources returned.
- The apprentice will be required to gather the relevant and required information from the employers' activity office (or equivalent) for the agreed session and complete a session template.
- There is a word count of 400 words (+/- 10%) for the session template.
- An example session template is included in Annex B.
- Gathering information and completing the session template will take a maximum of 60 minutes and should be undertaken in a controlled environment that is a quiet room free from distractions and influence, with the necessary equipment (session templates can be written, typed or completed online). It is anticipated that EPAOs will use the apprentice's employer's premises wherever possible to minimise costs.
- The session template will be completed by the apprentice within one-week prior to the observation and Q&A session with the independent assessor.
- The EPAO will appoint an invigilator to supervise the completion of the session template and to testify that the completed session template is the work of the apprentice.

## Part 2: Session Template Question and Answer

*(Maximum duration of 15 minutes, +/- 10 % at the discretion of the independent assessor)*

The independent assessor will ask the apprentice 5 contextualised questions selected from a test bank to cover the knowledge, skills and behaviours (KSBs) to be assessed during the session template.

EPAOs must develop question 'question banks' of sufficient size to prevent predictability and review them regularly to ensure they, and the questions they contain, are fit for purpose.

15 minutes will be allocated for the Session Plan Question and Answer session.

## Part 3: Observation in Workplace

*(Duration of 90 minutes (+/- 10% at the discretion of the independent assessor))*

This will be assessed through observation(s) that cover the start, middle and end of one or more outdoor activity or learning sessions. This will include the session planned during part one of the practical test.

Observations may be continuous or split into periods to best fit the operational requirements of the employer and the independent assessor. There may be breaks during the observation to allow the apprentice to move from one location to another.

The independent assessor must observe the apprentice whilst undertaking the following:

- Delivering the session.
- Meeting the session outcomes.
- Completing the session.
- Complying with their organisations requirements.
- Acting professionally in their practice.

#### Part 4: Observation Question and Answer

*(Maximum duration of 15 minutes)*

Following the observation period the independent assessor will ask the apprentice 5 contextualised questions selected from the question bank to cover the knowledge, skills and behaviours (KSBs) to be assessed during the practical test.

EPAOs must develop question 'question banks' of sufficient size to prevent predictability and review them regularly to ensure they, and the questions they contain, are fit for purpose.

15 minutes will be allocated for the Observation Question and Answer session.

## Assessment Method 2: Professional discussion supported by a portfolio of evidence

*(Duration of 45 minutes (+/- 10%))*

### Portfolio of Evidence

Apprentices will compile a portfolio of evidence on-programme during the learning journey. This will not be assessed during end-point assessment.

The portfolio will contain a minimum of 5 pieces of evidence and a maximum of 10. Evidence should be naturally occurring and relevant to the apprentices' actual job, e.g. session plans annotated with personal notes, session feedback form, completed incident/accident/near-miss form, weather forecast with notes showing alternative plans. Reflective logs should not be included as evidence in the portfolio.

The portfolio can be collated electronically.

The portfolio will be sent to the EPAO a minimum of 2 weeks prior to the professional discussion date.

### Professional Discussion

A professional discussion will take place between the independent assessor and the apprentice.

- The professional discussion will cover the topic areas and elements detailed in Annex A.
- EPAOs must develop 'question banks' of sufficient size to prevent predictability and review them regularly to ensure they, and the questions they contain, are fit for purpose.
- The assessor will review the portfolio prior to the professional discussion and generate questions based on the portfolio evidence.

EPAOs must ensure that professional discussions are conducted in a suitable controlled environment i.e. quiet room free from distraction and influence. It is anticipated that EPAOs will use the apprentice's employer's premises wherever possible to minimise costs. They may be conducted face-to-face or via an online platform e.g. video-conferencing. EPAOs must ensure appropriate methods to prevent misrepresentation are in place should an online option be used.

## EPA and Apprenticeship Grading

The grading approach reflects market value to the outdoor learning sector: what employers across the sector as a whole would constitute as an outstanding and exemplary Outdoor Activity Instructor, demonstrated in a way that is transferable across differing employers.

Performance in the EPA will determine the apprenticeship grade of fail, pass, or distinction.

- A pass apprentice will competently perform their role demonstrating application of all the knowledge, skills and behaviours in line with the standard. At a minimum they must meet all criteria.
- Distinction apprentices, in addition to meeting the pass criteria, will consistently perform above the required level for the role (see table on page 11).

Independent assessors must individually grade each assessment method – fail, pass or distinction, according to the requirements set out in this plan. Restrictions on grading apply where apprentices re-sit/re-take an assessment method – see re-sit/re-take section below.

Independent assessors' decisions must be subject to moderation by the EPAO – see internal quality assurance section below. Decisions must not be confirmed until after moderation.



## Resits/Retakes

Apprentices who fail one or more assessment method will be offered the opportunity to take a re-sit/retake.

A re-take requires the apprentice to undertake further learning and therefore would need to go through the gateway process again. A resit does not require further learning.

- Re-sits or re-takes must be completed within 3 months of the EPA, otherwise the entire EPA must be re-sat/re-taken. There is no limit to the number of resits or retakes.
- An apprentice cannot choose to re-sit/re-take any part of the EPA in order to increase their grade from a pass to a distinction.
- An apprentice requiring a re-sit or a re-take can only achieve a pass (unless there are extenuating circumstances accounting for the original fail as confirmed by the EPAO, which must be taken into account).

Any appeals in relation to the outcome of the EPA will be managed by the apprentice's EPAO whose decision is final.

## The Grading Criteria

Independent assessors must reach a grading decision based on the criteria given below.

- Fail Criteria** Apprentices who demonstrate any of the following fail criteria identified below will fail the practical test and/or professional discussion.
- Pass Criteria** The apprentice must demonstrate all of the pass criteria identified below.
- Distinction Criteria** The apprentice must display all of the pass criteria and all of the distinction criteria identified below.

The table below identifies the grading criteria for each assessment method:

### Assessment Method 1

#### Practical Test – Session template and Q&A, observation and Q&A

KSBs to be assessed as shown in Annex A			
KSB	Fail Criteria (Apprentice has failed to meet the pass criteria)	Pass Criteria (Apprentice must demonstrate all of the pass criteria)	Distinction Criteria (Apprentice must demonstrate all of the

			pass criteria and all of the distinction criteria)
K1, K2, K3, K5  S1, S2, S3, S4, S5, S6	Apprentice has failed to meet the pass criteria.	<p>The ability to describe at least 4 key pieces of information they would need to collate and use to deliver a session.</p> <p>Provides evidence of where they have prepared and delivered sessions tailored to suit the group and the defined outcomes for the session.</p> <p>Is able to describe at least 3 predictable changes in the environment and approved options to accommodate these.</p> <p>Is able to demonstrate how they select the appropriate equipment for the activity, access and set-up the venue location suitable for the session.</p>	Is able to demonstrate planning a session to suit individual needs within the group using a variety of spaces, interactions, roles, mini-groupings, teaching styles, resources, support, tasks, pace, achievement level, etc.
K8, K9, K10, K11  S7, S8, S9, S10, S11, S12, S13, S14  B1, B2	Apprentice has failed to meet the pass criteria.	<p>Is able to demonstrate delivering a session to suit the group needs and the defined outcomes for the session.</p> <p>Is able to demonstrate a level of subject knowledge and practical skills in the activity that is appropriate for the session being delivered.</p> <p>Can deliver appropriate briefing, demonstration and instruction during</p>	<p>Is able to demonstrate delivering a differentiated session to meet individual needs within the group using a variety of spaces, interactions, roles, mini-groupings, teaching styles, resources, support, tasks, pace, achievement level, etc.</p> <p>Is able to demonstrate a range of more complex instruction techniques (such as feedback based on observation of</p>

		<p>the session to meet the needs of the group.</p> <p>Provides evidence of where they use operational health and safety procedures in order to guide participants to venues, brief them on the session and maintain self and group safety throughout the session.</p> <p>Is able to assess the skill development of participants in order to provide on-going instruction to encourage further learning and progression for the individual and team.</p> <p>Is able to demonstrate how they would identify hazards in the environment and how they would change their delivery to adapt to them.</p> <p>Provides evidence where they have dealt with routine problems so that they do not negatively impact the session.</p> <p>Can describe how they have (or would) use basic First Aid and summon support for incidents or accidents as necessary.</p> <p>Can demonstrate being punctual, enthusiastic for the organisation, the session and presenting themselves in a manner</p>	<p>performance, or 1:1 coaching on technical, tactical, physical, psychological skills) in order to support an individualised approach.</p> <p>Provides evidence of recommendations they have made to change organisational procedures to improve session delivery or prevent routine problems.</p>
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		appropriate to the organisation.	
K15, K16, K17, K18, K19, K20  S15, S16, S17, S18, S19, S20, S24, S27  B4, B6	Apprentice has failed to meet the pass criteria.	<p>Is able to demonstrate how they use set approaches to instructing/teaching in order to meet the learning outcomes for each session.</p> <p>Can demonstrate encouraging individuals and using at least 3 simple techniques to support group engagement in sessions.</p> <p>Able to apply at least 3 different questioning and observation techniques to check progress of learning and show where they changed the pace of the session because of this.</p> <p>Is able to describe what review techniques and questioning styles they have used to evaluate achievement of the required outcomes of a session.</p> <p>Is able to identify 4 areas, which highlight that participants may have additional support requirements and advise on what they have changed in order to support their learning.</p> <p>Provides encouragement for participants to continue learning and improving over the session.</p>	<p>Identifies during the session learner attributes that may threaten them meeting the session outcomes, and is proactive in making in-session changes to their delivery in order to remove the barriers and ensure participation and achievement throughout the session.</p> <p>Is able to show examples of selecting and applying a range of advanced engagement activities, questioning styles or review techniques (such as peer-instruction, NLP logical levels questioning, individualised progression points, 1:1 feedback sessions) to tailor their delivery to individual needs.</p> <p>Provides evidence on where they have critically reflected on a session and improved or changed their delivery to improve future sessions.</p>

		<p>Provides evidence of where they have dealt with conflict and what actions they took to challenge the behaviour of participants and promote equality and diversity.</p> <p>Is able to demonstrate where they have communicated clear and concise instructions to both colleagues and participants in order for them to be able to undertake the activity.</p> <p>Is able to maintain a positive attitude with customers and colleagues throughout the observed session.</p>	
K21 S21, S22 B5	Apprentice has failed to meet the pass criteria.	<p>Provides evidence of where they have completed their activity delivery within the required timescales and ensured that the venue and equipment are returned to the correct areas.</p> <p>Can demonstrate promoting ongoing use of the outdoors and advising participants on suitable progression routes.</p> <p>Is able to review an individual's learning over the session and their personal objectives and then provide feedback and recommendations for further continuous</p>	Is able to demonstrate with examples how they have prepared individuals and the group for their next activity using the skills, knowledge and learning of the session they have just completed to agree what the next training session should be and identify the key learning requirements for it.

		development in order to improve performance.	
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## Assessment Method 2

### Professional discussion supported by portfolio of evidence

KSBs to be assessed as shown in Annex A			
KSB	Fail Criteria (Apprentice has failed to meet the pass criteria)	Pass Criteria (Apprentices must demonstrate all of the pass criteria)	Distinction Criteria (Apprentices must demonstrate all of the pass criteria and all of the distinction criteria)
K4, K6, K7, K12, K13, K14 B3	Apprentice has failed to meet the pass criteria.	<p>Is able to explain why an activity briefing is important and outline where information to support this is gathered from within their organisation.</p> <p>Provides evidence of how they use their organisation's procedures and standards when preparing for and delivering sessions.</p> <p>Is able to describe how and why they encourage group members to think about environmental impact and sustainability, and give at least 3 examples of behaviours that preserve or enhance the environment they work in.</p> <p>Is able to describe at least 4 common problems/issues related to working with groups in the outdoors and what</p>	Is able to explain how the theory-of-change they use influences the style and content of activity briefings they deliver.

		<p>they would do to mitigate these.</p> <p>Is able to describe how they would respond to accidents and emergencies that may occur whilst delivering a session.</p>	
K22, K23, S23	Apprentice has failed to meet the pass criteria.	<p>Is able to describe at least 3 of their organisation's products and the target market and potential benefits of each.</p> <p>Is able to describe the level of engagement their organisation would expect when working with both colleagues and participants.</p> <p>Provides evidence of where they have used participant's feedback to make an improvement to the session.</p>	<p>Is able to provide evidence of recommendations made to the organisation for improvements to operations or session delivery.</p> <p>Analyses participants' feedback and their own self-evaluation in order to improve on the sessions they deliver.</p>
K24, K25, K26  S25, S26, S28, S29	Apprentice has failed to meet the pass criteria.	<p>Is able to describe the organisations policy on equality and diversity and how this is used to encourage participation and inclusion whilst protecting client information.</p> <p>Provides evidence of where they handle and use sensitive information to support the preparation of sessions and support their colleagues in delivering them.</p> <p>Is able to describe at least 3 sources of</p>	<p>Is able to describe their own processes of reflective practice and the resulting professional development activities outside their workplace they have undertaken (<u>and</u> plan to undertake) to support their career progression.</p>

		<p>professional development they have used to further develop their knowledge and personal skills.</p> <p>Provides evidence of where they have self-evaluated their own performance and what actions they have taken as a result of this.</p>	
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## Deciding the Overall EPA Grade

An independent assessor must combine the grades of all assessment methods to determine the EPA grade.

- To achieve an EPA pass, apprentices must achieve a pass in both assessment methods.
- To achieve an EPA distinction, apprentices must achieve a distinction in both assessment methods.

See grading combinations table below.

Practical Test	Professional Discussion	Final Grade Awarded
Fail	Fail	Fail
Fail	Pass	Fail
Pass	Fail	Fail
Pass	Pass	Pass
Distinction	Pass	Pass
Pass	Distinction	Pass
Distinction	Distinction	Distinction



## Professional Body Recognition

### The Institute for Outdoor Learning

On completion, apprentices may be eligible to apply to apply to be Registered Members of the Institute for Outdoor Learning to support their professional career development and progression.

## Summary of Roles and Responsibilities

<p><b>Employer</b></p>	<p>To arrange and provide training and experiences for the apprentice to gain the knowledge, skills and behaviours specified in the apprenticeship standard.</p> <p>To sign off the apprentice as consistently working at or above the level of the standard (employer gateway).</p> <p>To arrange for and support EPA for apprentices who have passed through the employer gateway.</p> <p>Is not involved in the EPA process or decision on final grade awarded.</p>
<p><b>Training Provider</b></p>	<p>Conform to the requirements of the apprenticeship providers and assessment register (APAR).</p> <p>To train the apprentice in the knowledge, skills and behaviours required in the apprenticeship standard (as requested by and agreed with the employer).</p> <p>Is not involved in the EPA process or decision in final grade awarded.</p>
<p><b>Independent Assessor</b></p>	<p>Carries out independent assessment of the apprentice and makes the final decision on whether the apprentice meets the knowledge, skills and behaviours in the standard.</p> <p>Assesses the practical test and the professional discussion and awards fail, pass or distinction.</p> <p>Attends annual standardisation events.</p> <p>Undertakes ongoing CPD</p>
<p><b>End-Point Assessment Organisation</b></p>	<p>Conform to the requirements of the apprenticeship providers and assessment register (APAR).</p> <p>Provides guidance for apprentices, training providers and employers on EPA.</p> <p>Develops tools for collecting and measuring evidence.</p> <p>Recruits and trains independent assessors.</p> <p>Has effective quality assurance and quality control processes in place that support valid assessments.</p> <p>Is not involved in on-programme activities</p>

## Independent End-Point Assessment

An approved EPAO must conduct the EPA for this apprenticeship. Employers must work with the training provider to select an approved EPAO from the apprenticeship providers and assessment register (APAR).

## Internal Quality Assurance (IQA)

End-Point Assessment Organisations (EPAOs) must have in place a robust mechanism for internal quality assurance. This should include the ongoing monitoring and support of the independent assessment team, including regular standardisation meetings. Standardisation meetings should be undertaken annually to ensure the assessment system is consistent and reliable.

EPAOs for this standard must operate as a minimum the following:

- Operate moderation of assessment activity and decisions, through examination of documentation and observation of activity, with a minimum of 5% of each independent assessors' assessments moderated.
- Appoint independent assessors that meet the requirements as detailed in this plan
- Produce assessment tools and supporting materials for EPA that follow best assessment practice.
- Provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading.
- Have quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation over time.
- Operate regular standardisation events that enable independent assessors to attend a minimum of one event per year.
- Have a robust appeals procedure in place.

In order to ensure consistency and ensure employer's confidence in the apprentice's assessment in different parts of the country, at different times, by different independent assessors, all EPAOs have a responsibility to ensure sufficient standardisation events are attended and Continuing Professional Development (CPD) requirements are met.

Independent assessors involved in the assessment of this apprenticeship must be specialists in the field and occupationally competent. Independent assessors must be registered with an EPAO.

All assessment tools must be developed by the EPAO and updated as a minimum on an annual basis.

Internal quality assurance must be completed by an appropriately qualified person, and that person must not have been involved in any aspect of the delivery or assessment of the programme they are quality assuring.

## Independent Assessors

All EPAOs are required to check the independence of the independent assessor from the apprentice, ensuring that the independent assessor has not been involved in the learning, development or line management of the apprentice.

All independent assessors must:

- Have current and sufficient knowledge and understanding of the apprenticeship standard and the grading criteria
- Have at least 2 years' experience of working within the outdoor learning sector that provides up-to-date knowledge and understanding of operational models, apprentice training and good practice for the occupation of the apprentices they are assessing.
- Hold a recognised assessment qualification that addresses the assessment of both skills and knowledge in the workplace. Examples:
  - Level 3 Certificate in Assessing Vocational Achievement (CAVA), or A1, or D32/33, or
  - Qualified Teacher Status (QTLS or QTS) plus at least 12 months' experience of responsibility for the workplace competence assessment of outdoor instructors, leaders or teachers
- Undertake and record planned and relevant Continuous Professional Development. A minimum of 24 hours per annum is expected covering both vocational and assessment competence.

It is recognised that independent assessors may be required to observe an apprentice in a remote or hazardous situation (e.g. mountain, river or sea). In such situations the independent assessor must have the personal competence to ensure their own safety in the environment independent of the apprentices' scope of responsibility.

## External Quality Assurance (EQA)

EQA will be undertaken by Ofqual.

## Implementation

### Affordability:

The cost of the end-point assessment is based on the overall cost of:

- Logging applications for end point assessment
- Setting up the interview and appointment of independent assessors
- Independent assessor travelling and subsistence expenses
- Quality assurance to ensure consistency and rigour
- External quality assurance payment
- General administration of the process

In drawing up these costs the affordability and feasibility of the end-point assessment were taken into account including the option of undertaking the session template, or professional discussion by video conferencing link.

### Volumes:

The anticipated uptake of the apprenticeship in the first full year is 500 starts rising to 900 starts once the apprenticeship is fully established.

## Annex A

### Assessment Method by Element of the Standard – Outdoor Activity Instructor Apprenticeship

The end-point assessment methods will be as below:

Key: End Point Assessment Method:

PT	Practical Test
PD	Professional Discussion

	Knowledge Statement:	Assessment Method
<b>Preparing for Sessions</b>	<b>K1 How to collate and use information about the participants in order to run the session</b> such as group size, age, mental and physical ability, and relevant medical information.	<b>PT</b>
	<b>K2 How to meet the desired outcomes of the session</b> e.g. recreation and enjoyment, increasing self-confidence, learning about a local habitat.	<b>PT</b>
	<b>K3 The approved options for adapting a session to accommodate predictable environmental changes.</b>	<b>PT</b>
	<b>K4 The organisations procedures and standards relevant to the session being delivered.</b>	<b>PD</b>
	<b>K5 Activity venue locations and access arrangements.</b>	<b>PT</b>
<b>Delivering sessions</b>	<b>K6 The relevant Operational Procedures related to session delivery</b> to meet Health & Safety, environmental sustainability, safeguarding and data protection requirements.	<b>PD</b>
	<b>K7 Why an appropriate activity briefing</b> is important, what it needs to include and where to source the relevant information.	<b>PD</b>
	<b>K8 How to guide participants to and at the venue in a safe and efficient manner.</b>	<b>PT</b>
	<b>K9 Information about the training activity or subject at the required level to deliver the session.</b>	<b>PT</b>
	<b>K10 Basic good practice protocols and techniques for giving instructions and demonstrations.</b> E.g. visual, verbal.	<b>PT</b>
	<b>K11 How to identify hazards in the environment they are working and the dynamic changes that may occur.</b>	<b>PT</b>
	<b>K12 How to minimise environmental impact and support sustainability.</b> E.g. picking up litter, not broadening paths.	<b>PD</b>

	<b>K13 How to respond to problems:</b> A grasp of common problems and issues related to outdoor working in general, and the businesses specific products offering.	<b>PD</b>
	<b>K14 How to respond to and deal with incidents, accidents and emergencies</b> that may occur during the session.	<b>PD</b>
<b>Meeting session outcomes</b>	<b>K15 The organisations set approaches for instructing or teaching each activity in order to meet the defined outcomes of each session.</b>	<b>PT</b>
	<b>K16 Simple techniques to ensure engagement and participation by all</b> e.g. energisers, sharing responsibilities, appropriate pace.	<b>PT</b>
	<b>K17 How to use open questions and observation to check understanding and progression of learning.</b>	<b>PT</b>
	<b>K18 How to recognise participants that have additional support requirements</b> e.g. nervousness, short attention span, disengagement.	<b>PT</b>
	<b>K19 Simple techniques for dealing with conflict and challenging behaviours.</b>	<b>PT</b>
	<b>K20 Simple techniques and questioning styles to aid review of sessions</b> in meeting required outcomes.	<b>PT</b>
<b>Completing sessions</b>	<b>K21 How the venue should be left and equipment and resources returned</b> – including adherence to any reporting policies.	<b>PT</b>
<b>Organisation requirements</b>	<b>K22 How the organisation, and profession, should be represented</b> to include knowledge of the breadth and range of the organisations products and operating standards.	<b>PD</b>
	<b>K23 The organisations expectations on how to engage and communicate</b> with participants, organisers and work colleagues.	<b>PD</b>
<b>Professional practice</b>	<b>K24 The professions' policy on equality and diversity.</b>	<b>PD</b>
	<b>K25 Good practice regarding session structure to encourage participation and inclusion</b> while protecting sensitive participant information.	<b>PD</b>
	<b>K26 Sources for continuing development.</b> E.g. IOL Membership.	<b>PD</b>

	<b>Skills Statement</b>	<b>Assessment Method</b>
<b>Preparing for sessions</b>	<b>S1 Find and interpret information on:</b> the activity type and timings; outcome requirements; participant age; skill and knowledge level of the participants; medical information; equipment and resourcing allocation; venue; weather conditions.	<b>PT</b>

	<b>S2 Prepare sessions to achieve required outcomes</b> e.g. enjoyment, thrill seeking, personal or team challenges, acquisition of new knowledge or skills.	<b>PT</b>
	<b>S3 Select methods to meet all participant needs</b> e.g. visual impairment, mental and physical ability.	<b>PT</b>
	<b>S4 Select methods to respond to potential changes in the environment</b> e.g. wind increasing in a sailing session or rain making conditions slippery underfoot.	<b>PT</b>
	<b>S5 Collect appropriate equipment and resources</b>	<b>PT</b>
	<b>S6 Ensure the venue is set-up and ready to be used.</b>	<b>PT</b>
<b>Delivering sessions</b>	<b>S7 Maintain self and group safety when delivering the session.</b>	<b>PT</b>
	<b>S8 Deliver an effective session briefing</b> with clear instruction and following organisational procedures.	<b>PT</b>
	<b>S9 Perform a competent demonstration of the skills required for the activity or subject</b> at the appropriate level for the session.	<b>PT</b>
	<b>S10 Provide on-going instruction to encourage learning and progression.</b>	<b>PT</b>
	<b>S11 Follow organisational operating procedures to adapt to changes in the environment.</b> E.g. thunderstorm, a wind shift to offshore in a surfing session.	<b>PT</b>
	<b>S12 Select and implement organisational procedures to deal with routine problems.</b> E.g. broken equipment.	<b>PT</b>
	<b>S13 Provide basic First Aid to respond to accidents</b> in a safe, prompt and effective manner e.g. injured participant.	<b>PT</b>
	<b>S14 Initiate organisational procedures to summon support in the case of incidents or accidents.</b>	<b>PT</b>
<b>Meeting session outcomes</b>	<b>S15 Use the organisations set approaches for learning delivery.</b>	<b>PT</b>
	<b>S16 Support individual and group engagement and participation in the session</b> e.g. energisers, sharing responsibilities, appropriate pace.	<b>PT</b>
	<b>S17 Change pace of the session to match participant's speed of learning.</b>	<b>PT</b>
	<b>S18 Identify and support individual participant's needs</b> e.g. give personal attention, active listening, allow additional time, encouragement.	<b>PT</b>
	<b>S19 Apply simple techniques to deal with conflict and challenging behaviour</b> e.g. redirection, increasing responsibility.	<b>PT</b>
	<b>S20 Use simple review techniques to check the achievement of required outcomes</b> e.g. thumbs up; rounds; memorable moments.	<b>PT</b>



<b>Completing sessions</b>	<b>S21 Signpost participants to progression routes.</b>	<b>PT</b>
	<b>S22 Complete session within time</b> , including the restoration of the venue, return of equipment and resources and any logging or recording requirements.	<b>PT</b>
	<b>S23 Use participant feedback and own reflection to suggest improvements</b> to sessions.	<b>PD</b>
<b>Organisation requirements</b>	<b>S24 Communicate with customers and colleagues in a clear, concise and effective manner.</b>	<b>PT</b>
	<b>S25 Handle information</b> in a way that conforms to policy and protects data.	<b>PD</b>
	<b>S26 Assist with the development and preparation of resources</b> and support colleagues delivering sessions.	<b>PD</b>
<b>Professional practice</b>	<b>S27 Actively encourage whole group participation and promote equality and diversity.</b>	<b>PT</b>
	<b>S28 Undertake activities to further develop</b> knowledge and personal skills.	<b>PD</b>
	<b>S29 Reflect on own performance</b> and make refinements.	<b>PD</b>

<b>Behaviours Statement</b>	<b>Assessment Method</b>
B1 Show punctuality, diligence, commitment, and appropriate appearance.	<b>PT</b>
B2 Is enthusiastic for the organisations products and loyal to the employing organisation and brand.	<b>PT</b>
B3 Actively respects the environment and encourages behaviours in others that preserves it.	<b>PD</b>
B4 Is encouraging towards participants and supports each person to achieve to their limit.	<b>PT</b>
B5 Promotes on-going use of the outdoors and onward progression.	<b>PT</b>
B6 Shows a positive attitude with all colleagues and all customers come rain or shine.	<b>PT</b>

## Annex B

### Session Template

<b>Session delivered by</b>			
<b>Session activity type</b>			
	<i>Date</i>	<i>Start Time</i>	<i>End Time</i>
<b>Required session outcomes</b>			

<b>Participants</b>	<i>Group name</i>	<i>Age range</i>	<i>Number</i>
	<i>Previous experience</i>		
	<i>Other considerations</i>		

<b>Your organisations procedures and standards relevant to the session</b>	
<b>Weather expected for the session</b>	
<b>Venue / location allocated</b>	
<b>How the venue is to be left</b>	
<b>Resources available</b>	
<b>Other considerations</b>	

<p><b>Session approach</b></p> <p><i>(How will you run the session to meet the required outcomes – directive style or group-led, pace, inclusion of games, etc.)</i></p>

**Options for adapting the session***(If there are changes in weather, condition of paths, others using the venue, etc.)***Session briefing to include****Techniques you can use to ensure engagement and participation****Questions you can use to check understanding and progression of learning****Techniques or questions you can use to help participants review the session against the desired outcome****How environmental impact will be minimised and sustainability supported***Signed by Apprentice to verify "this is my own work"*

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*Signed by the EPAO appointed invigilator to verify "this is the above apprentices own work"*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Annex C

### Glossary/Definition of terms:

The Outdoor Sector has a large number of terms in common use with the possibility of multiple interpretations or meanings. In order to reduce misunderstanding or confusion, in the context of Outdoor Apprenticeships the employer group have adopted the following definitions:

**Outdoor Learning:** A purposeful experience in the natural world to develop knowledge, skills and understanding. It is a broad term that includes discovery, experimentation, learning about and connecting to the environment, and engaging in outdoor sports, teambuilding and adventure activities. Most activities take place outdoors, some activities may take place indoors as part of an outdoor learning programme, e.g. climbing walls, artificial caves, etc.

**Session:** The experience an Outdoor Activity Instructor plans and delivers to meet their customer requirements within a particular time period. A session may be 1-2 hours long or last a full day. It will include an individual activity or a series of activities.

**Activity:** An activity is a term used to describe a particular sport, subject, topic or pursuit undertaken by participants within the session.

- Typical outdoor or adventure activities include climbing, abseiling, canoeing, mountain biking, orienteering, sailing, coastering, surfing, etc.
- Typical environmental education or field study activities include guided walks, flora and fauna identification, forest school, bushcraft, geography, geology, environmental science, rock pooling, etc.
- Typical individual or team challenge activities include high and low ropes courses, initiative and problem solving tasks, etc.

**Session outcomes:** The defined aim or purpose of the session, e.g. increase confidence, improve skills, work in a team, learn about the environment, share fun, etc.

**Learning programme:** A linked series of sessions that provide a progression of learning for participants. Outdoor Activity Instructors typically lead individual sessions that form part of an outdoor learning programme.

**Participant:** An individual or group of individuals who are taking part in an outdoor learning session.

**Outdoor Activity Instructor:** The person who is in charge of running an outdoor learning session with participants. They are typically referred to as an instructor, leader, teacher, tutor, education officer, etc. in an employer's job title.

- Outdoor Activity Instructors have skills, knowledge and experience in a number of activities of varying length and complexity. The aims and objectives and needs of their employer will shape the balance between the number of activities and the depth of activity or subject knowledge.
- Outdoor Activity Instructors work with their own group of participants under the supervision of a chief instructor (or equivalent).

**Chief instructor:** The person in the business with the responsibility for ensuring competence on the day for that outdoor activity instructor, doing that activity, for those outcomes, with those participants, in those conditions. May also be referred to as Manager, Duty Manager, Technical Expert, Head of Activities, Head of Teaching, etc.

**Activity Office:** The place where the business communicates information to their instructor team about the customer, programme, instructor team, timings, resource allocations, name of chief instructor / duty manager for the day, etc. May also be referred to as programme office, central office, scheduling office, reception, planning room, resource base, briefing room, etc.