



IOL Occupational Standard

Outdoor Activity Instructor

First Edition V1.1

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1. Overview

Occupational Standard: Outdoor Activity Instructor

This Occupational Standard outlines the role and scope of an Outdoor Activity Instructor and the essential knowledge, skills and behaviours that are needed to meet the minimum requirements of the sector.

The occupational standard also provides guidance for the development of education and training to meet the standard. Training courses that demonstrate meeting the requirements of this standard can be recognised and accredited by IOL.

The Outdoor Activity Instructor Occupational Standard covers paid and voluntary roles that sit within all areas of the outdoor learning sector.

Typical work environments:

- Outdoor activity or education centres
- Outdoor adventure and activity businesses
- Expedition and sports tourism providers
- Schools and early years education organisations
- National parks, nature reserves and country parks
- Youth work and youth development organisations

Typical job titles:

- Outdoor Instructor
- Multi-Activity Leader
- Environmental Education Tutor
- Activity Instructor
- Ranger
- National Park Guide
- Woodland Leader
- Coach

Typical activities instructed:

- Adventure Sports (climbing, canoeing, sailing, mountain biking, archery, etc.)
- Outdoor Skills & Challenges (expeditions, ropes courses, raft building, etc)
- Nature Connection (bushcraft, forest schools, rockpooling, conservation, etc.)
- Outdoor Science (geography, geomorphology, environmental science, etc.)

2. Scope of the 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.

2.1 Responsibilities

The main responsibility of an Outdoor Activity Instructor is to run a safe and enjoyable activity session. They will:

- **Prepare for the session** – gather information about the participants and resources for the activity.
- **Deliver the session** – brief participants, maintain safety, provide on-going instruction and encouragement.
- **Meet the session outcome** – support participants to achieve an outcome (such as new skills / knowledge, thrill seeking, personal or team challenge).
- **Close the session** – hand-over participants, return resources and equipment, log any issues.

They exercise autonomy and judgement in their role to complete tasks and procedures and call on close back-up for problems and incidents that may occur. They will be supervised while working in a defined range of venues and weather conditions following operating procedures defined by their employer.

2.2 Specialisms

Outdoor Activity Instructors may work with an organisation who specialises in a particular client group (individuals or groups, specific age range, mental and physical ability) or range of activities offered.

Employers and other responsible parties should ensure that Outdoor Activity Instructors meeting this occupational standard demonstrate both holistic competence and specific activity competence appropriate to their role.

3. Requirements - Knowledge, Skills and Behaviours

3.1 Specific Activity Competence

The Institute for Outdoor Learning (IOL) recognise that individuals successfully meeting this occupational standard will hold the holistic knowledge, skills and behaviours required to enter the outdoor workforce as an Outdoor Activity Instructor.

The specific activity competence of each individual will be conditional on the activities, level, and duration of their education, training and experience. Education and training should meet accepted good practice or recognised NGB standards for the role (see section 4).

Outdoor Activity Instructors should be able to demonstrate the following knowledge, skills and behaviours.

3.2 Preparing for sessions

Knowledge and Understanding <i>The Outdoor Activity Instructor knows and understands:</i>	Skills <i>The Outdoor Activity Instructor is able to:</i>
<p>K1. How to collate and use information about the participants in order to run the session such as group size, age, mental and physical ability, and relevant medical information.</p> <p>K2. How to meet desired outcomes of the session e.g. recreation and enjoyment, increasing self-confidence, learning about a local habitat.</p> <p>K3. The approved options for adapting a session to accommodate predictable environmental changes.</p> <p>K4. The organisation's procedures and standards relevant to the session being delivered.</p> <p>K5. Activity venue locations and access arrangements.</p>	<p>S1. Find information on the activity type and timings; outcome requirements; participant age; medical information; equipment and resourcing allocation; venue; weather conditions.</p> <p>S2. Prepare sessions to achieve the required outcomes e.g. enjoyment, thrill seeking, personal or team challenges, acquisition of new knowledge or skills.</p> <p>S3. Select methods to meet all participant needs e.g. visual impairment, mental and physical ability.</p> <p>S4. Select methods to respond to potential changes in the environment e.g. wind increasing in a sailing session or rain making conditions slippery underfoot.</p> <p>S5. Collect appropriate equipment and resources.</p> <p>S6. Ensure the venue is set-up and ready to be used.</p>

3.3 Delivering sessions

<p>K6. The relevant operational procedures related to session delivery to meet Health & Safety, environmental sustainability, safeguarding and data protection requirements.</p> <p>K7. Why an appropriate activity briefing is important, what it needs to include and where to source the relevant information.</p> <p>K8. How to guide participants to the venue in a safe and efficient manner.</p> <p>K9. Information about the training activity or subject at the required level to deliver the session.</p> <p>K10. Basic good practice protocols and techniques for giving instructions and demonstrations e.g. visual, verbal.</p> <p>K11. How to identify hazards in the environment they are working and the dynamic changes that may occur</p> <p>K12. How to minimise environmental impact and support sustainability e.g. picking up litter, not broadening paths.</p> <p>K13. How to respond to problems: A grasp of common problems and issues related to outdoor working in general, and the businesses specific products offering.</p> <p>K14. How to respond to and deal with incidents or accidents that may occur during the session.</p>	<p>S7. Maintain self and group safety when delivering the session. (<i>GUIDANCE: able to apply the required technical and leadership skills for the activity or subject</i>)</p> <p>S8. Deliver an effective session briefing with clear instruction and following organisational procedures.</p> <p>S9. Perform a competent demonstration of the skills required for the activity or subject at the appropriate level for the session.</p> <p>S10. Provide on-going instruction to encourage learning and progression.</p> <p>S11. Follow organisational operating procedures to adapt to changes in the environment. E.g. thunderstorm, a wind shift to offshore in a surfing session.</p> <p>S12. Select and implement organisational procedures to deal with routine problems. e.g. broken equipment.</p> <p>S13. Provide basic First Aid to respond to accidents in a safe, prompt and effective manner. e.g. injured participant.</p> <p>S14. Initiate organisational procedures to summon support in the case of incidents or accidents.</p>
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3.4 Meeting session outcomes

<p>K15. The organisations set approaches for instructing or teaching each activity in order to meet the defined outcomes of each session. (<i>GUIDANCE: set approaches may be in form of a framework, format, structure, process or guiding principles</i>)</p> <p>K16. Simple techniques to ensure engagement and participation by all e.g. energisers, sharing responsibilities, appropriate pace.</p> <p>K17. How to use open questions and observation to check understanding and progression of learning.</p> <p>K18. How to recognise participants that have additional support requirements e.g. nervousness, short attention span, disengagement.</p> <p>K19. Simple techniques for dealing with conflict and challenging behaviours.</p> <p>K20. Simple techniques and questioning styles to aid review of sessions in meeting required outcomes.</p>	<p>S15. Use the organisations set approaches for learning delivery. (<i>GUIDANCE: set approaches may be in form of a framework, format, structure, process or guiding principles</i>)</p> <p>S16. Support individual and group engagement and participation in the session e.g. energisers, sharing responsibilities, appropriate pace.</p> <p>S17. Change the pace of the session to match participants' speed of learning.</p> <p>S18. Identify and support the individual participants' needs e.g. give personal attention, active listening, allow additional time, encouragement.</p> <p>S19. Apply simple techniques to deal with conflict and challenging behaviour e.g. redirection, increasing responsibility.</p> <p>S20. Use simple review techniques to check the achievement of required outcomes e.g. thumbs up; rounds; memorable moments.</p>
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3.5 Completing sessions

<p>K21. How the venue should be left and equipment and resources returned – including adherence to any reporting policies.</p>	<p>S21. Signpost participants to progression routes.</p> <p>S22. Complete a session within time, including the restoration of the venue, return of equipment and resources and any logging or recording requirements.</p> <p>S23. Use participant feedback and own reflection to suggest improvements to sessions.</p>
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3.6 Organisation requirements

<p>K22. How the organisation, and profession, should be represented to include knowledge of the breadth and range of the organisations products and operating standards.</p> <p>K23. The organisation's expectations on how to engage and communicate with participants, organisers and work colleagues.</p>	<p>S24. Communicate with customers and colleagues in a clear, concise and effective manner.</p> <p>S25. Handle information in a way that conforms to policy and protects data.</p> <p>S26. Assist with the development and preparation of resources and support colleagues delivering sessions.</p>
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3.7 Professional practice

<p>K24. The profession's policy on equality and diversity.</p> <p>K25. Good practice regarding session structure to encourage participation and inclusion while protecting sensitive participant information.</p> <p>K26. Sources for continuing development. E.g. IOL Membership.</p>	<p>S27. Actively encourage whole group participation and promote equality and diversity.</p> <p>S28. Undertake activities to further develop knowledge and personal skills.</p> <p>S29. Reflect on own performance and make refinements.</p>
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3.8 Behaviours

<p>B1. Show punctuality, diligence, commitment, and appropriate appearance.</p> <p>B2. Is enthusiastic for the organisations products and loyal to the employing organisation and brand. (<i>GUIDANCE: shows a professional approach when representing the organisation</i>)</p> <p>B3. Actively respects the environment and encourages behaviours in others that preserves it.</p> <p>B4. Is encouraging towards participants and supports each person to achieve to their limit.</p> <p>B5. Promotes on-going use of the outdoors and onward progression.</p> <p>B6. Shows a positive attitude with all colleagues and all customers come rain or shine.</p>

4. Education and Training Guidance

IOL encourages employers, education and training providers to utilise a range of training and assessment models to assist learners to meet this occupational standard.

4.1 Duration and level of education and training

The duration and level of education and training required to be competent as an outdoor activity instructor will strongly depend on the pre-existing knowledge and skills of each individual in the outdoor activity or subject area, the complexity of the outdoor activity and the expected outcomes of a typical session.

The specific activity competence of each individual will be conditional on the activities, level, and duration of their education, training and experience.

- Gaining the knowledge and skills to instruct a single outdoor activity at an introductory level is likely to require a number of days training, supported by practical experience and competence assessment. (E.g. Outdoor Sport NGB Instructor Award)
- Gaining the knowledge and skills to instruct a range of 6-8 employer defined outdoor activities and be able to work with a range of client groups and needs is likely to require in the order of 45 days training and education in addition to considerable work experience. (E.g. Outdoor Activity Instructor Apprenticeship)

4.2 Meeting accepted good practice

All education and training provided should meet accepted good practice or recognised NGB standards.

Employers, education and training providers are encouraged to use the sector recognised awards and qualifications as part of education and training courses to meet this occupational standard. This increases transferability of learners between organisations both inside and outside the sector.

Sources of guidance on good practice include, but are not limited to:

- Institute for Outdoor Learning
- UK Coaching
- National Governing Bodies of Sports (NGBs)
- Adventure Activities Licencing Authority (AALA)
- Chartered Institute for Sport and Physical Activity (CIMSPA)
- Society for the Environment (SocEnv)
- Geographical Association (GA)
- Society for Education and Training (SET)
- Chartered College of Teaching (CCT)

4.3 Mandatory qualifications or awards

To ensure the occupational standard is accessible and relevant for a wide breadth of employers (who offer a different range of activities dependant on their location) there are no mandatory qualifications.

Examples of qualifications that employers, education and training providers might include in a course designed to meet some or all of the required knowledge, skills and behaviours of this occupational standard are:

- Archery GB Instructor Award
- British Canoeing Paddlesport Instructor
- Mountain Training Climbing Wall Instructor
- Mountain Training Lowland Leader Award
- IOL Bushcraft Competency Award

4.4 Relevance to outdoor instruction

Many of the knowledge, skills and behaviours detailed in section 3 can be applied to a range of indoor and outdoor activities and pastimes. Employers, education and training providers should ensure that course content is specifically tailored to context of outdoor learning by including themes such as:

Physical safety - how to safely operate as an instructor in a range of different physical environments outdoors, particularly when on/in water, at height or in open countryside.

Changing conditions - how to respond and manage the group when conditions change. Being able to use verbal and non-verbal communication to manage safety when out of line-of-sight (e.g. caving) or very noisy (e.g. in a river)

Emotional safety - how to ensure the physical and psychological safety of individuals and groups in heightened emotional states, e.g. nervousness, anxiety, fear, uncertainty, withdrawal.

Meeting individual participants needs - how the running of an activity can be adapted to suit a particular individuals or groups needs. This is more than using different equipment or a different approach, but also how the activities and tasks within a session can be changed whilst still meeting the required outcomes.

Meeting dual outcomes - ensuring that participants are meeting not just the activity goals (e.g. to abseil down the rock face, or paddle a kayak down a river) but also the desired outcomes for the activity (e.g. to meet and overcome a personal challenge, or to learn how a riverbank habitat changes along its course).

Managing behaviour - outdoor activity instructors need to be able to manage a range of behaviours (e.g. disinterested, disengaged, disruptive) in order to create engagement and participation.

4.5 Supervision during education and training

The responsibility for participant safety and outcomes during education and training sessions should be managed by the designated trainer/teacher/lecturer.

1. Where observation, peer-instruction and team teaching are used as a primary method of off-the-job learning/training the learning focus must be clearly set, monitored and reviewed by the trainer/teacher/lecturer.
2. The learner should NOT be responsible for safety and outcomes during these training sessions.

4.6 Practical experience

Education and training to meet this standard should ensure learners gain experience of working within the outdoor sector and performing the duties of an outdoor activity instructor. A minimum of 20 hours is expected as part of the overall education and training.

Practical experience should include:

1. Experience leading outdoor activity sessions with customers/clients and holding responsibility for safety and outcomes.
2. Experience and understanding of working in the outdoor sector. This might include awareness of the range of employers and organisations in their area, work in other departments within a business, etc.

4.7 Assessment of learning

Assessments of competence against this occupational standard, should include formative assessment of specific knowledge and skills areas, and holistic assessment of an outdoor activity instructors' knowledge, skills and behaviours.

4.7.1 Holistic assessments

Holistic assessments should include:

- Session planning
- Observation of delivery
- Professional discussion

Decisions about pass criteria, assessment methods and assessor competence should be compatible with those described in the Outdoor Activity Instructor Apprenticeship Assessment Plan.

<https://www.instituteforapprenticeships.org/apprenticeship-standards/outdoor-activity-instructor/>

Holistic assessments should be carried out by:

- a) An independent assessor, or
- b) An assessor who is operating as part of a college or other educational or training organisation in providing the assessment and subject to meeting formal assessor requirements, Internal Quality Assurance (IQA) and External Quality Assurance (EQA) processes and monitoring.

5. Recognised qualifications and awards

This IOL Occupational Standard defines the essential knowledge, skills and behaviours that are needed to meet the minimum requirements of employers across the sector.

Occupational competence as an outdoor activity instructor can be demonstrated by:

- **Achieving a qualification or award aligned to this occupational standard.**
- **Receiving appropriate “in-house” education and training aligned to this occupational standard.**
- **Showing their experience is aligned to this occupational standard.**

The specific activity competence of each individual will be conditional on the activities, level, and duration of their education, training and experience.

5.1 Fully aligned qualifications and awards

The following qualifications / awards have demonstrated that their content and delivery fully covers the knowledge, skills, behaviours and education requirements described in this occupational standard.

Qualification or Award	Duration	Format	Further requirements to be a Registered Member of IOL
Outdoor Activity Instructor Apprenticeship (ST0479) (Level 3)	12-18 months in employment	Work based education and training (minimum 45 days) and on-the-job experience (more than 180 days).	No further requirements
Pearson BTEC Diploma in Sport and Outdoor Activities (720GLH and 1080GLH) (Level 3)	2 years full time student	Education and training of 720 or 1080 guided learning hours that includes 20 hours practical work experience.	More than 180 days on-the-job experience plus employer endorsement
MTE Level 3 Climbing Wall Instructor (Ofqual 603/2577/X)	73 Hrs Total Qualification Time	Training Course (12 Hrs), Assessment Course (6 Hrs), Personal Experience (10 Hrs), 15 Sessions Assisting with Supervision of Groups (45 Hrs)	More than 180 days on-the-job experience plus employer endorsement
MTE Level 3 Rock Climbing Instructor (Ofqual 603/2589/6)	149 Hrs Total	Training Course (24 Hrs), Assessment Course (16 Hrs),	More than 180 days on-the-job experience plus employer endorsement

	Qualification Time	Personal Experience (49 Hrs), 20 Sessions Assisting with Supervision of Groups (60 Hrs)	
MTE Level 3 Award in Lowland Leadership (Ofqual 603/0577/0)	122 Hrs Total Qualification Time	Training Course (16 Hrs), Assessment Course (16 Hrs), 20 Logged Walks (80 Hrs), Technical diary (10 Hrs)	More than 180 days on-the-job experience plus employer endorsement
MTE Level 3 Award in Mountain Leadership (Ofqual 601/0262/7)	360 Hrs Total Qualification Time	Training Course (60 Hrs), Assessment Course (60 Hrs), 40 Logged Walks (200 Hrs), Logbook completion (40 Hrs)	More than 180 days on-the-job experience plus employer endorsement

Organisations including Archery GB, British Canoeing, British Cycling and the Royal Yachting Association are also invited to add relevant qualifications / awards to this table.

5.2 Partly aligned qualifications and awards

The following qualifications / awards have demonstrated that their content and delivery covers the knowledge, skills, behaviours and education requirements described in this occupational standard **except** where noted.

Course Title and Provider	Duration	Format	Further requirements to meet this occupational standard

5.3 Aligned IOL Accredited Courses from employers or training providers

Training and employing organisations may choose IOL Course Accreditation to demonstrate their training course content and delivery is aligned with this occupational standard and will lead to outdoor activity instructor competence.

Course Title and Provider	Duration	Format	Further requirements to be a Registered Member of IOL

6. IOL Membership Eligibility

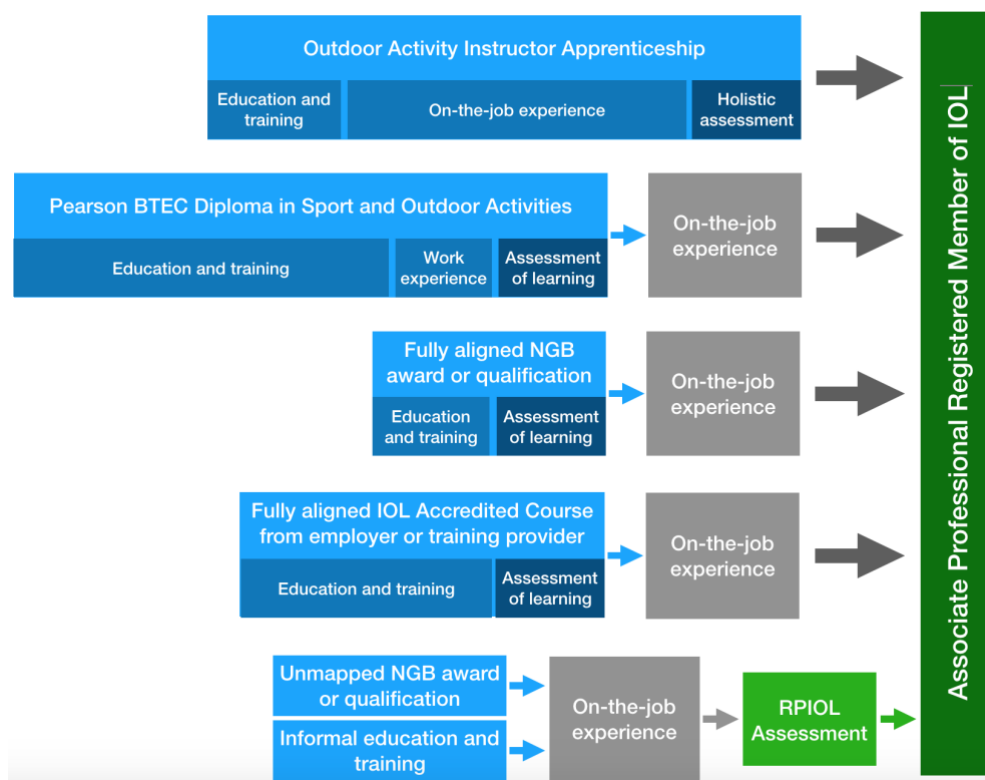
Recognition as a Associate Professional Registered Member of the Institute for Outdoor Learning is available to individuals who:

- 1) **Can demonstrate occupational competence** meeting the knowledge, skill and behaviour requirements as described in this occupational standard.

and

- 2) **Have occupational experience as an outdoor activity instructor** of more than 180 days in the role.

6.1 Routes to Recognition as a Associate Professional Registered Member of the Institute for Outdoor Learning



See the IOL website for further details on the requirements and benefits of membership.

6.2 Registered Practitioner of the Institute for Outdoor Learning (RPIOL) Award

The RPIOL award offers a work-based reflective process with external assessment for those with a minimum of 12 months occupational experience as an outdoor activity instructor.

The award criteria and process are currently being reviewed by IOL to ensure its continued relevance and match to sector needs and the requirements of this occupational standard.

7. Acknowledgements

This IOL Occupational Standard is based on the Outdoor Activity Instructor Apprenticeship Standard developed by IOL and the following employers:

- PGL
- Field Studies Council
- Lake District Calvert Trust
- JCA Adventure
- Channel Training
- Inspiring Learning
- Plas y Brennin
- Heatree Adventure Centre
- Action 4 Youth
- Peak District National Park
- Haven Banks OEC
- Inspiring Learning
- Locomotivation
- British Marine
- Cornwall College Group
- Rockley Watersports
- Woodlands Adventure
- Centre Parcs

Further refinements to this occupational standard have been prepared and reviewed by:

- Neal Anderson, IOL
- Dan Playford, Shuttleworth College
- Roger Hopper, Heatree Activity Centre
- Mark Lavington, PGL

8. 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 Occupational Standards the following definitions apply:

Outdoor Learning: Involving a planned and 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 may, or may not, 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, 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.

9. Revisions:

July 2018 Draft V0.1 Issued

September 2019 Version 1.0 Issued

- Inclusion of reference to individual activity competence in Section 2
- Numbers added to knowledge, skills and behaviours in section 3 to enable mapping against this document
- Clarifications added to all areas in section 4
- Mapped qualifications and awards added in section 5
- Requirements to be a Registered Member of IOL added in section 6

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- Additional mapped qualifications and awards added in section 5
- Clarification that Outdoor Activity Instructors should be able to demonstrate the knowledge, skills and behaviours described in section 3 and that the specific activity competence of each individual will be conditional on the activities, level, and duration of their education, training and experience.