



National
Guidance

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Using External Providers and Facilities

When planning an off-site visit, you should thoroughly research the suitability of the venue and check that facilities and third party provision will meet your group's needs and expectations. This is an essential element of risk-benefit management and is critical in deciding how you will supervise effectively.

Provider or Facility?

A 'provider' means any third-party person or organisation contracted to organise and/or deliver all or part of a visit or activity, and may include support with supervision.

A 'facility' is a venue or resource, which will form part of a visit but where the establishment's visit leadership team will lead and deliver any activities. For example: visiting museums and galleries, theme parks, theatres when the venue does not provide teaching or instruction to the group.

Researching Providers

When choosing a suitable provider you should consider the following questions:

- Do the values and ethos of the provider match your expectations?
- Can the programme be tailored to fulfil the learning outcomes of your group?
- What provision will be made for any special needs?
- Is there a clear understanding about the responsibility for supervision at all times during the visit?
- What are the respective roles of provider staff and your staff?
- How flexible is the programme to meet changing circumstances?
- To what extent will you be able to involve the provider in evaluation of the visit's learning objectives?

You have a duty of care to ensure that the provider you choose meets acceptable standards. This may be as simple as checking that it holds appropriate accreditation. Where the provider has no external accreditation, or where your group has particular special needs or programme requirements, checking may involve further questioning and information gathering.

Checking that the provider holds the Learning Outside the Classroom (LOtC) Quality Badge is the easiest way to confirm that quality and safety has been externally

accredited. For details of the badge and to check a provider's accreditation status go to: lotcqualitybadge.org.uk.

Where the visit involves certain adventure activities, within scope of the Adventure Activities Licensing Regulations 2004, then the provider is required by law to hold a licence from the Adventure Activities Licensing Authority (AALA). If a provider holds the LOtC Quality Badge this is evidence that they hold an AALA licence if they need one.

For details of AALA licensing and to check a provider's licence details go to: www.hse.gov.uk/aala. Further guidance can also be found in document 3.2f "Adventure Activity Licensing Regulations".

When the provider holds the LOtC Quality Badge and/or an AALA licence (if required) there is normally no need to seek further assurances from the provider about the safety of provision. Only if the specific needs of your group or visit are particularly complex is further investigation of an accredited provider likely to be appropriate.

Other accreditation schemes may help to provide reassurances about providers and reduce the need for further research or questioning. For example: 'Adventuremark', AHOEC Gold Standard and National Governing Body centre approval schemes.

If a provider does not hold a suitable accreditation which covers all aspects of their provision, then you must use other means of gaining assurances about relevant aspects of their operation including:

- Insurance
- Compliance with legal requirements
- Health, safety and emergency policies and procedures
- Use of vehicles
- Staff competence
- Safeguarding
- Accommodation
- Sub-contracting.

A Provider Questionnaire is an effective way of obtaining such assurances: see the example in document 8p "Provider Questionnaire".

It is not necessary to look for such accreditation or assurances from facilities that are open to the public and where no arrangements are made for them to provide activities, instruction, teaching or supervision. However, you still need to satisfy yourself about the suitability of such facilities for your group.

Researching Facilities and Venues

While the internet and the LOtC Quality Badge scheme have an important part to play in information gathering, there can be no substitute for a preliminary visit. This will back up research and enable you to clarify issues face-to-face. So, wherever reasonably practicable, it is good practice to carry out a preliminary visit to any unfamiliar facility or venue, including those used by a provider. The cost of this can be built into the pricing of the visit.

Preliminary visits enable the visit leader to address the following questions:

- Will the venue or facility be suitable to meet the learning outcomes of the visit?
- Are there any particular hazards or threats which need to be considered in your risk-benefit assessment and emergency procedures?
- What will be your options if the conditions of daylight, water level, temperature and weather, or under-foot conditions, differ significantly from the pre-visit?
- Do you have sufficient knowledge and understanding of the venue, facilities and activities to feel confident when planning the visit?
- Will the venue be able to cater for the full range of group needs, including any special needs?
- Will the group need any specialist equipment?
- Are there any staff training needs?
- Will participants need to be prepared or trained?

It is useful for a visit leader to take a camera on a preliminary visit, as photographs can be a great aid to briefing both the visit leadership team and the participants.

Where a preliminary visit is not reasonably practicable, you should consider how you will gather sufficient information to make an adequate assessment of the venue, facilities or provider. In the absence of first-hand observations and credible assurances as set out above, you should seek information from reliable sources such as:

- Your employer's Outdoor Education Adviser
- Colleagues
- Similar groups that have recently visited the venue or used the facility/provider.
- Reputable organisations such as tourist boards.

Risk Management Planning

Providers are responsible for assessing and managing the risks associated with their provision. Their risk assessments are likely to be technical and mean little to a visit leader unless qualified to understand, assess and, if necessary, to challenge them.

Providers are not responsible for producing a risk-benefit assessment for individual visiting groups – this is the responsibility of establishments/visit leaders who will know the needs of their groups.

What is useful to a visit leader is information from the provider that helps the visit leadership team to make best use of the facilities or venue, and to plan appropriate supervision for their particular group.

Practical information (e.g. a site plan, photographs, local advice) obtained from the provider, together with the knowledge and experience from a preliminary visit, are likely to be the most helpful to visit leaders' decision making and planning.

Example:

The chosen venue contains an unfenced pond or lake.

Leaders need to know that this exists and they need to decide how they are going to manage it with their group. They might for instance decide that their group of sensible and mature 17-year-olds requires no supervision at all; simply a briefing to be clear about expectations. Alternatively they might decide that children in year 3 will need close and direct supervision at all times to ensure that they cannot stray unsupervised to the water.

Ask the right question!

Q. Dear provider. Please could you send me copies of your risk assessments?

A. Dear visit leader. We have several risk assessments running to many pages. These are technical documents which we do not think will be of any use to you.

Q. Dear provider. Please could you send me any information that will help ensure the smooth running of our visit?

A. Dear visit leader. Certainly, please see attached the following documents: Information for Visitors, Site Plan, Suggested Itinerary, Feedback from recent visitors, etc.

Data Protection

A provider might need to have information about the participants in order to ensure that their provision is suitable and safe. For example, an activity provider might reasonably need details of an individual's age, gender, medical conditions, physical ability, dietary needs, anticipated behaviour and emergency contacts.

Such personal data is subject to data protection law and you must obtain parental permission to share it, and check that the provider has adequate privacy and data protection arrangements. See documents 4.4j "Participant Information and Data Protection" and 4.3d "Parental Consent".

It is vital for the health and safety of participants that such information is available to providers when they need it. You should check that your establishment's data protection policy allows you to share it.

Contracts

Before making a booking with a provider or facility, you should ensure that the contract you will agree with them is acceptable. See document 3.2i "Contracts and Waivers".

