



National  
Guidance

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## Selecting External Providers and Facilities

External providers and facilities may be chosen to support, enhance or supplement an establishment's own resources to maximise the outcomes from a visit. As part of visit planning, any external providers and facilities should be thoroughly researched and judged suitable to meet the establishment's and group's needs and requirements, and relevant safety standards. Visit Leaders should also consider how their leaders and any provider will work together.

Further information to help in assessing providers and/or facilities for certain specialist activities can be found in section 7 of OEAP National Guidance. For example: adventure activities; Duke of Edinburgh's Award expeditions; exchanges and homestays; farm visits; field studies; activities at water margins; heritage visits; museums and galleries; overseas visits and expeditions; residentials; study and sports tours; snowsports; swimming pools; armed services providers; visitor attractions.

### Provider or Facility?

A 'provider' means any person or organisation external to your establishment contracted to organise and/or lead all or part of a visit or activity. For example:

- A museum or other venue where their staff lead educational activities;
- An activity instructor or guide;
- A tour operator;
- An activity, field studies or outdoor education centre;
- A ski school;
- A Duke of Edinburgh's Award centre or activity provider;
- An expedition company.

A 'facility' is a venue or resource external to your establishment which you use for a visit, but which does not organise or lead any part of the visit. For example:

- Museums, galleries, theme parks, theatres, climbing walls, skate parks, bike tracks, ski slopes, swimming pools, when the venue does not provide teaching or instruction to the group;
- Hired or borrowed equipment.

## Choosing a Provider

Any provider must meet acceptable standards of quality and safety, including any of the following areas that are relevant to the provider and the planned visit:

- Health and safety policies and procedures;
- Emergency procedures (which should link to your establishment's emergency procedures);
- Use of vehicles;
- Equipment;
- Staff competence;
- Safeguarding (including DBS checks if required);
- Accommodation;
- Sub-contracting;
- Third party public liability insurance (see below);
- Data protection.

Confirming this may be as simple as checking that the provider holds appropriate, independently assessed, quality assurance – see below. In the absence of suitable external quality assurance, or if your group has particular needs or programme requirements, confirmation may involve further questioning and information gathering.

### Using Quality Assurance Awards

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 assessed as meeting nationally agreed standards. It covers all the areas listed above.

For details of the LOtC Quality Badge, and to check whether a provider holds it, see [www.lotc.org.uk/educators/developing-your-lotc/find-a-lotc-quality-badge-holder](http://www.lotc.org.uk/educators/developing-your-lotc/find-a-lotc-quality-badge-holder).

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

If a provider of adventure activities does not hold the LOtC Quality Badge, you should check whether it has an AALA licence (if it needs one). Further guidance can be found in OEAP National Guidance document [3.2f "AALA Licensing"](#). For full details of AALA licensing and to check a provider's licence details go to: [www.hse.gov.uk/aala](http://www.hse.gov.uk/aala).

When the provider holds the LOtC Quality Badge 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 a provider which holds the LOtC Quality Badge likely to be necessary.

When the provider does not hold the LOtC Quality Badge, other quality and safety assurance schemes can provide reassurances and reduce the need for further research or questioning. For example (in addition to an AALA licence):

- Adventuremark [www.adventuremark.co.uk](http://www.adventuremark.co.uk)
- Various National Governing Body centre approval schemes.

The Gold Standard of the Association of Heads of Outdoor Education Centres (AHOEC) sets higher standards than the LOtC Quality Badge, particularly in quality of service and learning. All holders of the AHOEC Gold Standard also hold the LOtC Quality Badge. See [ahoec.org/gold-standard](http://ahoec.org/gold-standard).

### Providers Without Suitable Quality Assurance Awards

If a provider does not hold suitable quality assurance awards which covers all aspects of its provision, you should consider whether you need to use other means of gaining assurance about relevant aspects of its operation.

For example, for a simple activity led by museum staff in a museum which the Visit Leader has visited previously and where establishment staff supervise the learners at all times, no checks may be needed, but for a higher-risk activity, or where the museum needs personal data about the learners, or where supervision of learners is handed over to museum staff, other checks may be necessary.

One way of obtaining information and assurances is to use OEAP National Guidance document [8.1g "Provider Statement"](#).

### Other Checks

In addition to the basic quality and safety checks when choosing a provider, you should consider the following questions:

- Do the location, facilities and activities offered by the provider match your desired outcomes?
- Do the values and ethos of the provider match your expectations?
- How experienced and competent are the provider's staff (e.g., in facilitation of learning)?
- Can the programme be tailored to fulfil your requirements?
- Is the programme flexible, to meet changing circumstances?
- What provision will be made for any special needs?
- Is there a clear understanding about the responsibility for supervision and welfare of participants at all times during the visit?
- What will be the respective roles of provider staff and your staff?
- To what extent will you be able to involve the provider in evaluation of the visit's outcomes?
- Is any travel to the venue worth its time and environmental impact?
- Is the total cost value for money and within your budget?
- Do you fully understand and accept any terms and conditions that will form part of your contract with the provider, including cancellation terms?
- Are there financial risks involved in using the provider?
- Are there any reputational risks involved in using the provider?

See OEAP National Guidance document [4.4f "Checklist – Assessing a Provider"](#) for a list of questions you might need to ask a provider in various circumstances.

For further guidance about managing risk when using a provider, see "Preliminary Visits", "Risk Management Planning" and "Contracts, Insurance and Financial Protection" below.

If you have concerns about any aspect of the provider, its proposed programme, or its terms and conditions, you should seek advice, such as from your employer's Outdoor Education Adviser.

## Choosing Facilities

Any facilities you use must meet acceptable standards of quality and safety.

As with providers, quality assurance can help in choosing facilities. If you use a facility provided by a holder of the LOTC Quality Badge (see above), or a venue which holds the LOTC Quality Badge (Site Only), there is normally no need to seek further assurances.

It is not normally necessary to look for quality assurance awards for facilities in the UK that are open to the public and where no arrangements are made for them to provide activities, instruction, teaching or supervision.

As with providers, you do need to satisfy yourself about the suitability of facilities for your group and your planned activities. Some of the provider checks listed above may be relevant.

If you plan to hire or borrow equipment for activities, then you should ensure that it is safe and suitable for your group. You should only hire or borrow equipment for adventure activities from a reputable source which can provide evidence of maintenance and inspection, and only if your establishment staff are technically competent to check it. The LOTC Quality Badge does not cover the provision of hire equipment.

## Preliminary Visits

While quality assurance awards and other sources of information provide essential assurances, they are not a substitute for a preliminary visit and being able to clarify issues face-to-face. So, wherever reasonably practicable, it is good practice to carry out a preliminary visit to unfamiliar facilities and providers. The cost of this can be built into the visit budget.

Preliminary visits enable the Visit Leader to address questions such as:

- Will the provider and/or facilities be suitable to meet your requirements for the visit?
- Are there any particular hazards which need to be considered in visit planning and preparation?
- What will be the options if 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 provider, facilities and activities to feel confident when planning the visit?
- Will the provider and/or facilities be able to cater for the full range of group needs, including any special needs?

- Will it be possible to follow current guidelines on avoiding infection during an epidemic?
- Will the group need any specialist equipment?
- Are there any staff training needs?
- Will participants need to be prepared or trained?

Photographs taken on a preliminary visit can be a great aid to briefing the visit leadership team, parents and participants.

Where a preliminary visit is not reasonably practicable, 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 – in other words, with those parts of the visit which they are contracted to provide. Their risk assessments are likely to cover technical aspects of little meaning to visit leaders unless qualified to understand, assess and, if necessary, to challenge them. You should therefore not normally ask a provider for its risk assessments.

Any results of a provider's risk assessment requiring action by visitors should be clearly explained in information (such as safety guidance) provided to visitors.

Providers are not responsible for producing a risk assessment for individual visiting groups – this is the responsibility of establishments/Visit Leaders who will know their groups. The establishment is responsible for assessing the risks involved in the areas for which it is responsible, for example: assessing the provider (as above); travel to and from the venue; supervision of the participants except at times when this has been handed over to a provider; any activities led by establishment staff.

What is useful to a Visit Leader is information that helps with planning and with making best use of the facilities, for example:

- Are there any hazards or threats that should be considered in the visit planning and supervision?
- Does the provider have any rules or conditions that they expect the participants to comply with?
- What options are available if the conditions or circumstances on the day don't allow for the planned activities or programme?
- What practical information is available to help planning and making best use of the facilities (e.g., a site plan, photographs, local advice)?

**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 17-year-olds does not require direct supervision; simply a briefing to be clear about expectations. Alternatively, they might decide that children in Year 3 will need direct supervision to ensure that they cannot stray unsupervised to the water.

**Ask the right question!**

NOT:

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.

BUT:

Q. Dear Provider. Please could you send me any information that will help me with my planning and 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.

**Contracts, Insurance and Financial Protection**

Before making a booking with a provider or facility, you should ensure that the contract you will agree, including any terms and conditions, is acceptable, and that you have your employer's approval to enter into such a contract. See OEAP National Guidance document [3.2i "Contracts and Waivers"](#).

You should check that the provider or facility you use has sufficient third party public liability insurance to meet your employer's minimum requirements. £5 million is often regarded as a minimum, but some employers require more than this and in some cases (such as very simple low-risk provision) a smaller amount might be acceptable. The limit of public liability insurance for each holder of the LOTC Quality Badge is shown on the LOTC website at [www.lotc.org.uk/educators/developing-your-lotc/find-a-lotc-quality-badge-holder](http://www.lotc.org.uk/educators/developing-your-lotc/find-a-lotc-quality-badge-holder).

You should consider whether there are any significant financial risks in using the provider, and how you can mitigate these. For example, you could:

- Check the reputation of the provider using references and reviews;
- Check whether the provider is a member of a trade association or similar organisation that provides assurances about its members;
- Check whether the provider has any insurance or bonding arrangements which cover financial insolvency;
- Ask your employer's finance officer to carry out checks on the provider's financial position;
- If possible, pay after you have received the contracted services;
- Pay with a credit card which provides buyer protection under the Consumer Credit Act.

If the provision is for a 'package' including more than one element of a visit (such as accommodation, transport or other services), the Package Travel Regulations may apply. These provide financial security, such as through an Association of British Travel Agents (ABTA) bond. If the package includes air travel, there is an additional requirement that the organiser must hold an Air Tour Operator's Licence (ATOL). For further information, see OEAP National Guidance document [3.2h "Visits and the Package Travel Regulations"](#).

### Working with External Providers

After you have selected a provider and contracted with them, you should plan how you will work with them. In particular, you should consider the respective roles and responsibilities of establishment staff and provider staff, and how you will monitor the provision. See OEAP National Guidance document [4.4h "Using External Providers"](#).

