



LOtC Quality Badge Route 1 Application Guidance

Introduction

This guidance will help you to evaluate the provision you make for learners against each of the quality sub-indicator statements in the Self Evaluation Form (SEF). Having evaluated your organisation's learning provision in this way you will be in a better position to decide whether or not you can confidently tick the box alongside each statement, which implies a declaration of compliance.

CLOtC recommends that you compile your portfolio of evidence whilst completing the self-evaluation form. This will ensure that, should you be selected for a quality assurance visit, you will make the best use of the assessor's time on the day of assessment. This will also allow you to benefit fully from any advice or suggestions s/he can offer.

You will be required to sign a declaration that the statements given in your application are accurate, and that you understand and comply with the requirements of the LOtC Quality Badge. This document is downloadable from the final page of the online SEF, and should be printed, signed, scanned and returned to CLOtC as soon as possible ensure that your application is processed without delay. If residential accommodation is available at your setting/s you will also need to complete the online LOtC Quality Badge residential checklist and an onsite inspection visit will be required.

The validity period of your LOtC Quality Badge will run for two years from the date of award. As a small charity, CLOtC requires payment of the registration fee before the award can be made. You can pay this fee online as part of the application process, or you can opt to be invoiced. Prompt payment of the invoice will ensure that your LOtC Quality Badge is awarded as soon as possible.

At the beginning of the online form you will be asked to write 4 short paragraphs describing how your organisation meets the broad requirements of each set of criteria. This isn't intended to be exhaustive; rather it is to give CLOtC a snapshot of your standard of compliance and is useful during the desktop audit as a way of getting a feel for your provision on the ground. There is no need to address the indicators individually in this section.

To complete the rest of the form you will be required to tick a box confirming your compliance against each quality indicator.

Q.I. 1	The provider has a process in place to assist users to plan the learning experience effectively
1a	<p>My organisation offers guidance/information or agrees on the roles and responsibilities of both the user and the provider i.e. who does what.</p> <p>Guidance and information can be communicated in a variety of ways. Whichever method is used it should be unambiguous, making it clear what is provided well in advance of the experience.</p> <p>A clear statement of the roles and responsibilities of both the provider and the user should be agreed at the earliest opportunity during pre-visit planning. It should cover education provision, risk assessment and learner supervision. This information should be documented (electronically or hard copy); for example, through a planning form, booking form or checklist, a clearly laid out brochure, a website or another appropriate means.</p> <p>User pre-visits should be encouraged and effective two-way communication must be established.</p> <p>Documentation should detail the necessary arrangements for the experience (date, time, numbers, staffing/supervision, etc.) and the roles and responsibilities essential for effective management.</p> <p>It should make clear where there is shared responsibility; (e.g. for agreeing what learning outcomes are intended, supervision during downtime or mealtimes, use of a shop, etc.).</p> <p>Statements such as ‘we provide this information over the phone’ or ‘we discuss this when they arrive’ are not sufficient. Feedback comments from visiting teachers can often confirm whether the procedures work well or not.</p> <p style="text-align: center;"><i>NB Pastoral care is still ultimately the responsibility of the teacher/group leader</i></p>
1b	<p>My organisation captures or agrees learning objectives</p> <p>Visiting teachers must have the opportunity to agree learning objectives that meet the specific needs of their pupils/students before they come. Sometimes this may take the form of an agreement to purchase a pre-arranged package (with or without modifications); and sometimes this may be specifically designed to meet the needs of a particular group. Objectives should include reference (where appropriate) to the acquisition of new skills and personal and social development.</p> <p>The provider needs to clearly communicate the experiences being offered and the learning that they are intended to provide.</p> <p>The provider should have evidence that learning outcomes are clear from the pre-planning stage onwards – recorded, for example, on booking forms or through correspondence with the user. These might be those offered by the provider, requested by the user or developed through collaboration. The agreed learning outcomes may be presented in many different ways and formats.</p> <p><i>NB. Learning objectives and learning outcomes are phrases used to describe what it is that learners are intended to have learnt during or following an activity. They are an essential part of planning and guide the nature of learning experiences and the places where they should occur. Learning outcomes can be expressed as knowledge, skills, understanding and/or as</i></p>

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	<i>personal development. Teachers use these as the starting point to plan how they will deliver the curriculum - subjects, areas of learning, themes, etc.</i>
1c	<p>My organisation offers a menu of activities or plans a tailored programme of work, with a purpose for each activity, linked to learning objectives</p> <p>The provider should be able to tailor the learning experiences offered to meet specific user requirements. There should be evidence that the provider has made clear the range of activities and programmes of work being offered and demonstrated how these might be adapted to suit user needs. Evidence should be available that shows a clear purpose(s) for each activity that enables users to make informed choices. There should be an obvious link to intended learning outcomes.</p> <p>This information is usually set out in brochures, handbooks and/or on a website. It is important that the aims, purposes and expected learning outcomes are specified. A list of activities alone is not sufficient.</p>
1d	<p>My organisation takes into account any equality, diversity and inclusion issues and needs</p> <p>Providers should make their policy/ies clear to users. They should be able to provide examples of how equality, diversity and inclusion can impact on planning. It should be clear how providers ask users what their requirements are in terms of equality, diversity and inclusion (this could include food requirements).</p> <p>Examples of where providers are unable to be inclusive should be clearly communicated to users. For example some activities may have a pre-requisite – such as being able to walk over rough ground or climb stairs. There should also be, perhaps through a booking form or correspondence, evidence that access needs are confirmed by the user.</p> <p>The obligation of the provider is to provide information and ask questions, but it is the user's responsibility to ensure activities are suitable for children's specific needs.</p>
1e	<p>My organisation offers guidance/information on or agrees a process with the user, for assessing learner progress during the overall experience and how the experience will be evaluated.</p> <p>Evidence should be available that shows how the provider is able to help with assessing learner progress. For example, that the provider understands what preparation the user has done pre-visit (for example in the classroom) or has taken time to understand the learners' level of existing knowledge, skills, etc.</p> <p>The methods used by a provider for evaluation should be shared with users in advance of the experience; for example the user could be informed that evaluation forms will be distributed at the end of the experience; or that the learners will be asked to comment.</p>
1f	My organisation offers guidance and/or resources/activities for or discusses with the user preparation and follow-up to the visit

	<p>The provider should have prepared guidance on opportunities to extend learning pre and post-visit. These could include any resources that could be used or suggestions of activities associated with an area of learning, in preparation for the visit.</p> <p>Likewise, providers should have evidence that they have offered helpful suggestions about how to plan for the experience and support users in follow-up work; for example, through information provided, extension work, collections and materials which can be taken away or through more direct support to the user post-visit.</p>
Q.I. 2	The provider provides accurate information about its offer
2a	<p>My organisation ensures that any promotional and/or written materials provide an accurate description of amenities, facilities and services provided and contact details</p> <p>A full and accurate description of the site, including all amenities, facilities and services, should be provided in advance of the visit. This information should cover site descriptions, eating areas/cafeterias, shops, outside and inside space, cloakrooms/storage facilities, access information, hand washing facilities, etc.</p> <p>Any information that impacts on the user experience should be detailed and contact details should be supplied. The information could be presented in a variety of formats such as an up-to-date website, hard copy brochure, set of guidance notes or leaflet or direct correspondence with the user which describes amenities, facilities and services.</p> <p>The intention is to confirm that users do not get a misleading or over-optimistic impression of what they will actually experience.</p> <p>This section would gain a 'not met' judgement if the promotional materials were deliberately misleading, but not if they were fair and accurate but undersold the provision (i.e. what learners experienced exceeded their expectations based on what they had read before they came).</p>
2b	<p>My organisation has charging policies that state honestly the charges of the experience</p> <p>The provider should be explicit about its charging policies so that the user can plan financially for a learning outside the classroom experience.</p> <p>Information about charging policies should include the cost of the experience, any variable costs (e.g. discounts depending on group size, etc.) and any additional costs likely to be incurred on site (e.g. car parking, the shop, etc.). This information might be provided on a website or in a leaflet or through direct correspondence with the user.</p> <p>Evaluation responses could confirm that past users felt that they had a fair deal and got value for money.</p>
Q.I. 3	The provider provides activities, experiences or resources which meet learner needs
3a	<p>My organisation offers a variety of activities delivered through a range of teaching and learning styles</p>

	<p>Information on all provision (through written correspondence, on the website, leaflet, etc.) should make clear the suitability of experiences for different learning styles and learning needs. Providers should be able to show that they have considered different learning styles and are aware that an essential element of learning outside the classroom is learning through direct first-hand experience.</p> <p>Evidence could be provided from course and session plans, displays, direct observation, user feedback and self-evaluation by the provider that an appropriate range of active learning approaches are being used.</p> <p>This could include recognition of how different learning needs are being met (based on age, ability, prior learning, preferred learning styles and the amount of time available). The ultimate judgement is that learners of all ability make good progress in gaining new knowledge, skills and understanding.</p> <p>A 'fully met' judgement cannot be given if there are significant inconsistencies in the quality of teaching and learning between sessions with some teaching being very good but some being barely adequate or inadequate.</p>
3b	<p>Equipment and materials are suitable for tasks and/or activities, the age and ability of the learners, are current and in good working order</p> <p>Providers should have evidence which shows that equipment and materials used in activities are suitable for the needs of users. This means ensuring that they are accessible; for example by providing a viewing gallery or a platform to improve visibility.</p> <p>Equipment should be well maintained and the provider should be able to provide evidence of routine checks, maintenance and replacement.</p>
3c	<p>My organisation makes good use of its location</p> <p>All locations have rich opportunities for learning. However, many locations have special merit and evidence of how these are exploited for educational purposes should be available.</p> <p>Where resources are not purpose built, alternative provision for such things as toilets, storing clothing and eating areas, can be effective. Some providers have multiple locations which can provide evidence of a range of provision for multiple visits and variety and progression in learning.</p>
3d	<p>The amenities, facilities and services are as described in promotional and/or written materials</p> <p>Applicants should provide accurate information about what they offer. This should reflect their operational practices to ensure consistency, safety and security. Where changes are necessary, users need to be forewarned or informed as quickly as possible. It should be made clear to users beforehand if there are any areas/activities where access is denied to certain groups; for example, private areas, shop, public places, etc.</p> <p>The assessor needs to be able to match the amenities, resources, organisation and learning experiences seen on the ground with the descriptions provided in the promotional materials and pre-course information.</p> <p>Discussions with users and questionnaire responses will confirm whether users feel that they are getting the experiences that they expected from the pre-visit materials. Evidence of repeat</p>

	bookings will be valuable here.
3e	<p>Educational and/or instructional staff members or volunteers of my organisation are competent</p> <p>Evidence will be needed of how a provider ensures the competency of staff (paid and voluntary) to meet their educational role. This could be through the management of human resources - recruitment, induction, mentoring, professional development, appraisal and training.</p> <p>Evidence will be needed that members of staff have relevant qualifications or experience and are trained in the delivery of their particular role. Staff should be appointed after a fair selection procedure that includes an interview and then receive a full induction programme.</p> <p>All members of staff should have appropriate opportunities for professional development. Staff performance is monitored (e.g. by user feedback, peer observation, formal appraisal systems, self-evaluation, quality assurance systems, external evaluation, etc.). Particular attention should be given to ways in which part-time and volunteer staff are trained, briefed, supported and deployed.</p> <p>There should be documentation of staff skills and qualifications, induction and training which is accessible to users (such as assessment for staff and participant competence, evidence of training needs analysis, link to HR policy and practice, job descriptions, clearly defined staff structure, with responsibilities and accountabilities, Investors in People award, LOtC Quality Badging in terms of management standards).</p>
3f	<p>My organisation has a process in place for monitoring and evaluating the quality of the teaching/instruction of our education or instructional staff members or volunteers</p> <p>Evidence should be available to show that there is an effective process for evaluating the quality of teaching and learning of the education staff (paid and voluntary).</p> <p>There should be evidence of how information is collected through monitoring their work. For example, through making checks on planning, peer mentoring, direct observation, evaluations and feedback, performance reviews, etc.</p> <p>In larger organisations there may be a corporate policy in place for monitoring and evaluating the quality of teaching/instruction: If this is so, any recent reports could be presented as evidence.</p>
Q.I. 4	The provider reviews the experience and acts upon feedback
4a	<p>My organisation evaluates its services</p> <p>The provider must ensure that learning programmes are appropriate to the nature of the organisation and the needs of users.</p> <p>In order to do so, the provider needs to instigate self or third party evaluation of its services. For example the organisation might participate in an external/third party accreditation scheme which reviews and evaluates the overall quality of learning provision at the organisation (e.g. external awards scheme, funding application, etc.) Alternatively there might be in place an internal quality assurance system or review process which requires those responsible for delivering learning to review and evaluate staff performance, programme content and delivery</p>

	<p>and the overall role of learning.</p> <p>This could be a formal process or could take the form of regular, noted staff meetings. The evaluation should be regular, all-encompassing and the results should be recorded and acted upon as appropriate.</p>
4b	<p>My organisation gathers feedback from users (teachers and learners), including:</p> <ul style="list-style-type: none"> • Whether what was agreed at the planning stage was delivered • Whether learning objectives have been met • Whether value for money has been achieved <p>The activities and programmes offered by a provider should also be current and relevant to the needs of users. There should be a process in place to allow teachers and learners to comment on the content of the learning experience, whether the stated learning objectives were met and whether the experience was worth the money spent (e.g. feedback form, comments book, comments board, video diary, web discussions, etc.).</p> <p>Alternatively, the provider should initiate follow up contact with the user (telephone, letter, email, etc.), asking them to comment on the content of the learning experience, whether the stated learning objectives were met and whether the experience was worth the money spent. It is very valuable to gather the views of young people as well as visiting teachers and group leaders.</p> <p>If the experience takes place over an extended period of time, the provider should have a mechanism for feeding back on and developing the experience as it progresses.</p> <p>In order that user feedback is as considered as possible, the provider should discuss (or share information about) the feedback process with the user prior to the learning experience.</p>
4c	<p>My organisation has a process in place to change practices as a result of review, evaluation and feedback</p> <p>Review, evaluation and feedback must be acted on in order to develop learning provision which more closely meets the needs of the user. Anecdotal and statistical evidence should be recorded and analysed. Where there are clear trends in the feedback, action should be taken in response to that feedback and that action should be evidenced in updated versions of the education programme, menu of activities or specific session/activity plans.</p> <p>Regular meetings should be held to establish what, if any, changes need to be made in terms of planning, staffing, programme content and delivery in relation to learning services based on feedback and evaluation.</p> <p>A provider should be able to cite examples of how changes have been made as a result of feedback and evaluation. Examples should be shown of changes made over time to keep up to date with new practices and requirements. A particularly valuable discussion point is how the provider copes during very busy periods.</p>
Q.I. 5	The provider meets the needs of users
5a	My organisation communicates effectively with users

	<p>Information and guidance on the learning provision offered by a provider should be easily available to the user. The provider should have clear and accessible channels of communication for the user and seek to maintain that communication for the life cycle of the visit/experience.</p> <p>Evidence must be available that the provider and user can inform each other of any changes to what has been agreed pre-visit if circumstances change. During a visit, users should be well briefed prior to each activity to familiarise them with the location, planned activities, protocols and expectations.</p> <p>It is important to show that the person who communicates with the user before the visit passes on key information to the education staff running each session.</p>
5b	<p>Essential written policies and procedures are reviewed, maintained and updated. This is undertaken on a regular basis and covers all venues and all activities</p> <p>It is important that all parts of the organisation are aware of and prepared to meet the needs of users. This means that all practice, whether directly related to learning or not, should be regularly reviewed, maintained and updated.</p> <p>Essential written policies and procedures in relation to all aspects of the organisation should be dated, reviewed/updated regularly and made available to all paid and unpaid staff (e.g. code of conduct, education policy, staff handbook, teachers' guidelines, education programme, performance appraisal procedures, risk management policy, health & safety guidelines, etc.).</p> <p>Policies should be live and consistently applied, and not just generalised statements of good intentions that are kept in a drawer or on a shelf.</p>
5c	<p>My organisation has an understanding of sustainability issues and the impact of activities and shares this with users</p> <p>Learning outside the classroom should enable the learner to place themselves and their knowledge and skills in a wider context. Therefore the provider should attempt to ensure that the user is aware of the wider environmental context of the learning experience.</p> <p>There might be a website or leaflet providing information on sustainability issues and practices associated with the site/organisation and/or the experience itself (e.g. impact on the local community, impact on natural environment, recycling practices, energy/water conservation, etc.).</p> <p>Where appropriate, there might be an element to educational activities which addresses issues of sustainability in relation to the learning taking place.</p> <p>There should be a clear written environmental statement or policy for the organisation which is made available to users.</p> <p>Providers may wish to give examples of how a visit to them will promote sustainability.</p>
5d	<p>My organisation has a process in place to monitor the overall quality of provision across its site (or sites) and makes changes where necessary</p>

	<p>The provider should endeavour to ensure that the quality of learning provision and the experience of the visit as a whole is consistent for all new and repeat users. This might be achieved through central training procedures (e.g. health & safety, front of house/guiding, etc.) for all staff at all sites or through regular central review of all practices at sites/parts of a single site (meetings, formal review process). This might be covered by quality assurance processes overseen by the person responsible for learning, including a review of all programmes, processes and policies.</p> <p>This section is especially important for organisations that have multiple sites and providers that offer a range of different activities organised by different people in different departments. Evidence should be presented of central policies that have been tailored to different sites or specialities. There should be corporate systems in place for such things as professional development, recruitment and selection, quality assurance, self-evaluation and the exchange of new ideas and best practice. As a consequence of all of this, users should be able to be confident that they will receive equivalent standards of service at any centre/department of the organisation, even if the settings are different.</p>
Q.I. 6	The provider has safety management processes in place to manage risk effectively
6a	<p>My organisation has safety management procedures in place so that risks are identified and appropriately managed. These are shared with users.</p> <p>In order that all parts of the organisation are aware of and prepared to meet the needs of users, the provider will have in place the following:</p> <ul style="list-style-type: none"> • A risk management policy, with systems in place and operating • Risk assessments for specific activities • A process for reviewing and updating these risk assessments • A process for recording and acting upon near misses, accidents, incidents, etc. • Appropriate first aid provision • Emergency procedures and/or an action plan • A review of written health and safety policies (links to indicator 5b above).
6b	<p>My organisation complies with all external regulation relating to it, e.g. Health & Safety at Work Act, Equalities Act, etc.</p> <p>In order to meet this indicator, a provider will need to sign and submit a declaration form i.e. a signed statement which confirms compliance with all external regulation relating to the organisation.</p>
6c	<p>My organisation has appropriate / agreed public liability insurance, reflecting the scope and size of the organisational activities.</p> <p>In order to meet this indicator, the provider will need to sign and submit a declaration form i.e. a signed statement which confirms the organisation has an appropriate level of cover.</p>
6d	My organisation has relevant safeguarding procedures in place and robust child protection

	<p>policies and procedures which are communicated to all staff.</p> <p>Safeguarding and child protection are slightly different concepts. Safeguarding refers to promoting the welfare of children, and is a broader term than child protection. It encompasses protecting children from maltreatment, preventing impairment of children's health or development, and ensuring that children enjoy an environment consistent with the provision of safe and effective care. Child protection is a part of safeguarding and refers to activities undertaken to prevent children from suffering, or being likely to suffer, significant harm.</p> <p>The approach to safeguarding taken by the provider should include:</p> <ul style="list-style-type: none"> • providing a safe environment for children to learn in; • ensuring that all staff and volunteers understand the importance of safeguarding - including listening to and discussing with children; • preventing unsuitable people from working with children; and • having a clear process in place for dealing with disclosure. <p>All of the above should form part of the induction of new staff and volunteers.</p> <p>The provider should have evidence to show that they provide child secure venues and activities by addressing safeguarding in general; and child protection in particular. This evidence should include:</p> <p>Up-to-date and regularly reviewed safeguarding and child protection policies, which are read and understood by all staff and volunteers. These need not be lengthy or complicated documents, and should go beyond the prevention of harm to describe the responsibilities that staff and volunteers have for the children they work with, and most importantly what to do if a child raises a concern or is of concern.</p> <p>Evidence that the provider follows safer recruiting guidelines, including:</p> <ul style="list-style-type: none"> • explicit safeguarding statements in any advertisements for paid or voluntary vacancies; • inclusion of suitability to work with children as a requirement of the position; • verifying the successful applicant's identity; and • obtaining information on and thoroughly checking applicants' previous work history and experience.
6e	<p>All eligible staff are subject to the appropriate DBS check.</p> <p>The provider should have evidence to show that the appropriate DBS check has been carried out for all eligible staff. Only those who fall under the new definition of regulated activity will be eligible for a barred list check. Advice and full details of the change in legislation can be obtained from the Disclosure and Barring Service at www.gov.uk/db-check-requests-guidance-for-employers.</p> <p>Where a potential employee is not part of the DBS online Update Service, procedures should be in place to ensure the timely provision of any DBS check results to the employer.</p> <p>Evidence should be supplied that the provider has sought advice from the Disclosure & Barring service as to which, if any, checks are appropriate for staff and volunteers.</p>

	<p>It is important to remember that DBS checks, whilst an important safeguard, are only a small part of child protection and should not be relied upon as the only means of ensuring employee suitability.</p>
6f	<p>Where animals are kept on site or used as part of the education service the appropriate welfare standards are maintained</p> <p>Any animals used should be cared for according to species-specific requirements, using the welfare recommendations of the Secretary of State's Standards of Modern Zoo Practice as a minimum standard. This should include:</p> <ul style="list-style-type: none"> • Provision of food and water • Provision of a suitable environment • Provision of health care • Provision of the opportunity to express most normal behaviour • Protection from fear and distress. <p>The use of animals should focus on natural behaviour and any indication that an animal's welfare is being compromised should result in the immediate termination of the session.</p>
6g	<p>Where there is contact with animals, appropriate hygiene and hand washing procedures are in place.</p> <p>Suitable hand cleaning facilities should be provided adjacent to any areas where users and learners might come into contact with animals. These facilities should comprise running water with adequate drainage, liquid soap and paper towels or hot air hand dryers. They should be accessible to all visitors and be properly maintained and cleaned as required (at least daily). Provision of anti-bacterial gel is not sufficient.</p> <p>Suitable instructions must be given to wash hands thoroughly after animal contact and before eating, both via signs and verbally. Users should be encouraged to ensure that all learners in their care wash their hands correctly.</p> <p>Adequate facilities must be provided for meeting animals, taking into account the animal type and age and including penning and barriers where necessary.</p>
<p>Extra Activities Checklist</p>	
<p>The LOtC Quality Badge must cover the total extent of services that you provide to schools or other educational establishments. Where an activity falls outside the area of expertise of the Route 1 assessors, further assessment could be required before the award can be made.</p> <p>Failure to declare at this stage could result in the refusal of your application or the removal of your LOtC Quality Badge award at a later date.</p> <p>The declaration applies to facilities and activities delivered directly, and to those delivered via third parties which form a part of your promoted educational provision.</p>	

Residential Checklist

In all cases the assessor will need to see evidence of compliance with all of the residential criteria, including *current* certification and inspection reports.

a) Welfare

Providers are expected to take all reasonable measures to ensure that users are comfortable during their stay and that the premises are secure. A reasonable level of privacy is expected, for example appropriate blinds at any windows and separate bathroom facilities for male and female users.

b) Fire Safety

The assessor will ask to see evidence of all fire risk assessments and drills/walk-throughs, as well as testing of the alarms, smoke detectors and extinguishers.

All fire exits must be clearly signposted and users must be made aware of their location before the first overnight stay.

c) Food Hygiene

Where catering is part of a residential offer the assessor will expect a high standard of compliance with regulations. Evidence of all required checks, routines and records will need to be presented.

d) General Health & Safety

Ground floor or easily accessible windows should be lockable whilst allowing ventilation. All windows are recommended to be restricted to a maximum opening of 100mm/4 inches (subject to local regulations).

Radiant heaters are not recommended. Rooms should not have individual gas heaters of the type that vent carbon monoxide. Individual convection heaters should be free from any accidental overheating risk (from covering by clothing, for example). The flue from central gas boilers must be more than 1.5 metres from any opening into the building.

Lighting in sleeping accommodation should cover all parts of the room and be adequate at night to prevent slips, trips and accidental collisions.

Further information

If you have any questions or comments regarding this guidance, please contact the LOtC Quality Badge helpline on 07545 696881 or qualitybadge@lotc.org.uk