**Boatyard Self-Analysis and Assessors Report Form for QAB Scheme**

**This form must be typed, hand written forms will no longer be accepted**

This is a dual-purpose form used by boatyards/boat operators and also by assessors conducting the QAB assessment.

For boatyards/boat operators the form will help you decide if your hire base is ready for the external audit. Where a ‘Yes’ or ‘No’ response is required please circle the appropriate ‘Y’ or ‘N’ initial in the respective area. Where a fuller response is required please enter the required information in the space provided. If there is not enough room, please continue on separate sheets and staple them to this form. The areas boatyards/boat operators need to complete are un-shaded.

The assessors will use your completed form when conducting their assessment. The areas the assessors will complete have been shaded for ease of identification.

**General Information**

 **Boatyard completion Assessor only**

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| --- | --- | --- |
| **Name of Boatyard / Operator/ Group:** |  |  |
| **Name of Person Completing this Pro-Forma:** |  | **Name of Assessor:** |  |
| **Date of Assessment:** |  |
| **Position:** |  | **Result:** |  |

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| **Assessor summary comments:** |

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| **Assessor - Required Actions:** |

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| --- |
| **Assessor - Recommendations:** |

**Overview of the Boatyard (Boatyard) Assessor comments**

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| How many boats does the yard hire out for more than one night? |  |  |
| How many day boats does the yard have for hire? |  |  |
| **What services are provided?**Direct bookings | **Y / N** |  |
|  Arrival and departure services | **Y / N** |  |
|  Car parking  | **Y / N** |  |
|  Toilet facilities | **Y / N** |  |
|  Housekeeping | **Y / N** |  |
|  Emergency and maintenance services on the waterway | **Y / N** |  |
|  Quayside services; fresh  water, etc. | **Y / N** |  |
|  Other |  **Y / N** |  |
| **How many staff do you employ?**Reception  |  |  |
|  Engineers |  |  |
|  Housekeeping |  |  |
|  Handover |  |  |
| **What staff training do you provide?** |  |  |
| Customer Service | **Y / N** |  |
| Accessibility | **Y / N** |  |
| Health & Safety | **Y / N** |  |
| Handover | **Y / N** |  |
| Boat Maintenance | **Y / N** |  |
| Emergency Procedures | **Y / N** |  |
| Other | **Y / N** |  |

**Health & Safety & Legal**

**Assessors -** A selection of licences and certificates should be viewed during the assessment.

 (**Boatyard)** (**Assessor comments)**

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| --- | --- | --- | --- |
| Who in the company is the Safety Management System Designated Person? DP | **Requirement** | **Y/ N** |  |
| Do you have a documented Safety Management System in place? | **Requirement** | **Y/ N** |  |
| Does the SMS include the below: |  |
| Do you have Risk Assessments in place for all boatyard and hire operations? | **Requirement** | **Y/ N** |  |
| Do you have a documented policy on risk assessment review with identified changes in circumstances which would trigger risk review? | **Requirement** | **Y/ N** |  |
| Who in the company is responsible for ensuring that all of the certification and licences are in place?  |  |  |
| Are they all held at the boatyard? If not, where?  |  |  |
| Does the boatyard operator have a valid Fire Risk Assessment document?Does it include boats? | **Requirement** | **Y/ N****Y / N** |  |
| Servicing of fire extinguishers | **Requirement** | **Y / N** |  |
| Do you have a valid boat licence for each hire boat? | **Requirement** | **Y / N** |  |
| Do you have a boat safety certificate for each hire boat? | **Requirement** | **Y / N** |  |
| Do you have a valid Gas Safe certificate for each hire boat? | **Requirement** | **Y / N** |  |
| Do you have a valid Stability certificate for each boat? All by 1st April 2022 except:All vessels on CRT and Broads Sailing vessels by 1st April 2023 | **Requirement** | **Y / N** |  |
| Do you have current public liability and employers (where appropriate) liability insurance? | **Requirement** | **Y / N** |  |
| Do you PAT test electrical equipment? | **Best Practice** | **Y / N** |  |
| Do you have a documented Environmental Policy? | **Requirement** | **Y / N** |  |
| How do you ensure that every boat is in a safe condition for each hire? |  |  |
| Is this procedure documented? | **Requirement** | **Y / N** |  |
| How do you keep customers to the boatyard away from potentially dangerous areas? |  |  |
| Is this procedure documented?  | **Requirement**  | **Y / N** |  |
| Where there are tunnels on routes are life jackets/buoyancy aids provided? | **Best Practice** | **Y / N** |  |
| Do you have documented emergency procedures for likely incidents? | **Requirement** | **Y / N** |  |
| Do you have a documented procedure for conveying information about navigation restrictions or other hazards to hirers.  | **Requirement** | **Y / N** |  |
| Do you have a documented procedure for reporting relevant incidents and accidents to the appropriate authority? | **Requirement** | **Y / N** |  |
| Do you have a documented self audit process? | **Requirement** | **Y / N** |  |

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| **Assessor’s own supplementary questions**. |

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| **Assessor comments & feedback**  |

**Company Website and Brochure**

 **(Assessor comments)**

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| --- | --- | --- | --- |
| Are any logos and awards displayed correctly?  | **Requirement** | **Y / N** |  |
| Are boat descriptions and facilities such as sleeping and bathroom arrangements clear on the website and the brochure? | **Requirement** | **Y / N**  |  |
| Is there a pictorial plan for each boat? | **Requirement** | **Y/ N****Y / N** |  |
| Are other on-board arrangements and facilities clearly detailed | **Requirement** | **Y / N** |  |
| Is the type of electricity supply on the boat detailed? Inverter fitted | **Best practice** | **Y / N** |  |
| Are the terms and conditions of the business clearly laid out and easy to understand? | **Requirement** | **Y / N** |  |
| Are the website search and booking functions easy to use? |  | **Y / N** |  |
| Is it easy to contact the yard with questions? | **Requirement** | **Y / N** |  |
| Do any special offers advertised provide added value over and above the normal rate? |  | **Y / N** |  |
| Is customer feedback provided on the website? | **Requirement** |  |  |
| If an in-house grading scheme is operated, is it clear to potential customers that it is operated in-house and how a grading is achieved? |  |  **Y /N** |  |

**Assessor comments and feedback**

**In-House Boat Assessments (if relevant)**

 **(Boatyard) (Assessor comments)**

|  |  |  |
| --- | --- | --- |
| If an in-house boat assessment system is used, please give details |  |  |
| Is a clear explanation of the assessment scheme provided for customers? |  **Y / N** |  |
| Is it made clear that this is an in-house scheme and is not connected to VisitEngland or British Marine? |  **Y / N** |  |
| If an in-house boat assessment is used, how often is each boat assessed? |  |  |
| Is each boat measured against a clearly defined set of criteria? |  **Y / N**  |  |
| Does the in-house assessment process take account of quality as well as facilities? |  **Y/ N** |  |

**Assessor comments and feedback**

**Office and Boatyard Procedures**

 **(Boatyard) (Assessor comments)**

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| --- | --- | --- | --- |
| Are guests able to check availability and fully complete a booking on-line? | **Best Practice** |  **Y /N** |  |
| Are guests made aware of the Terms and Conditions at the time of the booking? | **Requirement** |  **Y / N** |  |
| Are on-line payments carried out securely? | **Requirement** |  **Y / N** |  |
| Can guests book by telephone or by post? |  |  **Y / N**  |  |

**Assessor comments and feedback**

**Arrival and Departure Procedures**

 **(Assessor comments)**

|  |  |  |
| --- | --- | --- |
| What information is sent out to guest pre-arrival? |  |  |
| Is the address of the yard and clear directions to the site provided? Also public transport links? | **Best Practice** |  **Y /N** |  |
| If on-site car parking is provided, is it clearly signposted, surface in good order, lit and secure? | **Best Practice** |  **Y / N** |  |
| Is assistance or are trolleys provided to transport luggage to the boat? | **Best Practice** |  **Y / N** |  |
| Is there a standard ‘Welcome’ procedure? | **Requirement** |  **Y / N** |  |
| Are staff well-presented and welcoming? | **Requirement** |  **Y / N** |  |
| In what conditions are customers expected to leave the boats and is this detailed? | **Requirement** |  |
| Are departure times from the boats clearly detailed? | **Best Practice** |  **Y / N** |  |
| Are recycling facilities offered  | **Best Practice** |  **Y / N** |  |

**Assessor comments and feedback**

**Customer Satisfaction Survey / Complaints Procedure**

 **(Boatyard) (Assessor comments)**

|  |  |  |  |
| --- | --- | --- | --- |
| Is the complaints procedure clearly detailed and provided to customers via the website and /or in written material? | **Best Practice** |  **Y / N** |  |
| How are complaints dealt with if they are raised during the holiday? |  |  |
| How are complaints dealt with if they are raised following the holiday and departure from the boatyard? |  |  |
| Are complaints monitored and analysed in order to identify weaknesses in procedures or individual boats? If so, how often? | **Required** |  **Y / N** |  |
| Is there any evidence of any measurable improvement to any aspect of the business as a result of customer complaints?  |  |  **Y / N** |  |
| Is a customer satisfaction survey operated? | **Best Practice** |  **Y / N** |  |
| Are all customers invited to make comments? |  |  **Y / N** |  |
| How are the results used? |  |  **Y / N** |  |
| If boats are let on behalf of third party owners, is a written report provided to the owner in order to provide quality feedback and improvement points? |  |   **Y /N** |  |

**Assessor comments and feedback**

**Housekeeping**

 **(Boatyard) (Assessor comments)**

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| How does the company ensure a high standard of housekeeping throughout the fleet? |  |  |
| Do housekeepers undergo training? | **Best Practice**  (where appropriate) |  **Y / N** |  |
| Are there any supervisory staff? | **Best Practice** (where appropriate) |  **Y / N** |  |
| Are spot checks undertaken? | **Best Practice**  (where appropriate) |  **Y / N** |  |
| Is the standard of housekeeping included in the customer satisfaction survey?  | **Best Practice** |  **Y /N** |  |

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| **Assessor comments & feedback** |

**Boat Maintenance**

 **(Boatyard) (Assessor comments)**

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| --- | --- | --- | --- |
| Do you keep maintenance logs for each hire boat?  | **Requirement** |  **Y / N** |   |
| How does the company ensure that every boat goes out in good working order every time?  |  |  |
| Are worksheets generated for mechanical and domestic defects? If yes, how are they generated? | **Requirement** | **Y / N** |  |
| What is the servicing regime?  |  |  |
| Who is responsible and is the process well managed?  |  |  |
| What is the procedure for responding to breakdowns or emergencies on the water for one of your boats?  |  |  |

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| **Assessor comments & feedback** |

**Accessibility**

 **(Boatyard) (Assessor comments)**

|  |  |  |  |
| --- | --- | --- | --- |
| Are there any accessible features on the website? | **Best Practice** |  **Y /N** |  |
| Can deaf customers or those with hearing impairment communicate and book either on-line or via email? Are staff aware of the Type-Talk service? |  |  **Y / N****Y / N** |  |
| Are some boats a little more accessible than others and is this made clear in the information?  | **Requirement** |  **Y /N** |  |
| Are staff trained to assist customers with special needs?  | **Best Practice** |  **Y / N** |  |
| **Assessor comments & feedback** |

**BOATYARD ONLY**

**Boat Handover & Customer Information**

|  |
| --- |
| **Name of Boat Handover Staff** |
| **Initials** | **Full Name** | **Time with the Company**  | **Job Role** | **Qualifications/Experience**  |
|  |  |  |  |  |
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| **Handover Staff –** |  |  |
| Number of handover staff  |  |  |
| How are handover staff trained |  |  |
| **Assessor feedback & comments** |

Does the route(s) to be cruised from this base include the following features?

|  |  |  |  |
| --- | --- | --- | --- |
| **Locks** **Y / N** | **Swing Bridges** **Y / N** | **Tunnels** **Y / N** | **Stream Conditions** **Y / N** |
| **Other** – Please specify and explain |

These features are explained to the hirer by the use of:

|  |  |  |
| --- | --- | --- |
| **Live Demonstrations** **Y / N** | **Models**  **Y / N** | **Old Lock Gear** **Y / N** |
| **Other** – Please specify and explain |

Is a Boat Acceptance Certificate used with all hire parties starting from this base? **Y / N**

If you answered ‘NO’ to this question, please explain below what you do instead:

|  |
| --- |
|  |

Are bookings for this base supplied by a third-party?

|  |  |
| --- | --- |
| **Booking Agencies**  **Y / N** | **Travel Agents** **Y / N** |

Please indicate what information is provided to the hirer, who supplies it and when it is supplied:

|  |  |  |
| --- | --- | --- |
| **Publication** | **Supplied by Whom?** | **When?** |
| Advisory video or CD-ROM produced by Canal & River Trust /Broads Authority/Environment Agency |  |  |
| Canal & River Trust/Environment Agency Boater’s Handbook – Basic Boat-Handling and Safety |  |  |
| Others – Please specify |  |  |

**Organised groups and parties that include people with special needs**:

**Y / N**

Is the leader of these types of hire parties asked to sign a written record stating

that they are responsible for ensuring that their hire party conforms to the

Standards laid down by their parent organisation?

**The Quality Audit Trail**

Please compile a set of sample documents that show the quality audit trail for your boat hire operation. This is your portfolio of evidence that will demonstrate to the auditor how your printed material and record keeping complies with the QAB Standard. The portfolio should contain the following items:

|  |  |
| --- | --- |
| Brochure (or leaflet if no brochure produced) | **Y / N** |
| Hire Terms and Conditions | **Y / N** |
| Booking Form | **Y / N** |
| Boat Acceptance Certificate | **Y / N** |
| Customer Log Sheet – or equivalent documentation | **Y / N** |
| Quality Feedback Form | **Y / N** |
| Other – Please specify | **Y / N** |

If you answered ‘NO’ to any of the items in the audit trail please explain here what you do instead:

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**Additional Information**

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**ASSESSORS ONLY**

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| --- | --- | --- | --- |
| **Boat Handover** |  |  |  |
| **Customer Log & Information** |  |  |  |
|  | **Example 1** | **Example 2** | **Example 3** |
| Name of Boat |  |  |  |
| Date of Hire |  |  |  |
| Name of Booker |  |  |  |
| Name of Skipper |  |  |  |
| Mobile phone number & car registration details |  |  |  |
| Name of all other persons in party |  |  |  |
| Age of any under 18’s |  |  |  |
| Life Jackets /buoyancy aids issued, as appropriate |  |  |  |
| Name of Handover staff |  |  |  |
| Time of arrival |  |  |  |
| Time handover started |  |  |  |
| Time handover completed |  |  |  |
| In water trial completed  |  |  |  |
| **Assessor feedback & comments** |

**ASSESSORS ONLY**

|  |  |  |  |
| --- | --- | --- | --- |
| **Boat Acceptance Certificate** |  |  **Staff Initials** |  |
|  | **Covered****Y/N** |  |  |  |  | **Comments** |
|  |  |  |  |
| Details of the following must be given as part of a detailed handover and recorded |  |  |  |  |  |  |
| Safety on board* People on deck
* Falling overboard
* Lifejacket/buoyancy aids
* Fire extinguishers
 |  |  |  |  |  |  |
| Boat handling* Boat manual
* Other waterway users
* Steering, stopping and mooring
 |  |  |  |  |  |  |
| Engine* Maintenance
* Controls
 |  |  |  |  |  |  |
| Appliances on board* Gas
* Electric
* Toilets
 |  |  |  |  |  |  |
| Environment* Speed limits
* Rubbish/litter
* Reed/shallow water
 |  |  |  |  |  |  |
| Contact details* Breakdown
* Emergency
* Accident
 |  |  |  |  |  |  |
| * Waterways features
* Locks
* Fixed and/or swing bridges
* Tides
 |  |  |  |  |  |  |
| Conditions of boat* Return time and state of boat
 |  |  |  |  |  |  |
| Signatures & Printed Names* Skipper
* Hirer
* Handover staff
 |  |  |  |  |  |  |
| **Assessor feedback & comments** |

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| **Information provided to the Hirer** |
| **What** | **By whom** | **When** |
|  |  |  |
|  |  |  |
| **Assessor notes** |

**Appeals Procedure**

If for any reason you wish to appeal against the rating awarded, British Marine has an established appeals procedure. A fee is payable, which is refunded if the appeal is upheld. Applications should be made within 14 days of receipt of the report. For details please contact QAB at QAB@britishmarine.co.uk or telephone 01784 223648.