

# NATIONAL GUIDE TO HIRE BOAT HANDOVER



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British Marine Federation  
Marine House  
Thorpe Lea Road  
Egham  
Surrey  
TW20 8BF

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The main trade and navigation bodies for the UK's inland waterways	

## How This Guide Can Help You

This “Guide to Hire Boat Handover” has been written to help hire boat operators promote safe enjoyment of the inland waterways. It draws together good practice from practical experience of BMF members in the UK and is appropriate for operators providing hire boats for short breaks or longer cruising holidays.

The guide provides a national view and covers what every operator should include; inevitably there will be local and regional variations due to the differing nature of the waterways. Operators should therefore also refer to the appendix that has been written to cover their type of waterway, eg canals, broads, rivers, etc.

It is important to understand that the hire operator is responsible for deciding what information, briefing and training they should provide to the hirer and when it should be provided. There are several factors to consider when making this decision. The UK’s Health and Safety regulations, made under criminal law, place obligations on all businesses to take reasonable steps to protect employees and customers. The navigation authorities also place specific requirements on hire boat operators as detailed in the licence conditions. Compliance with the procedures in this Handover Guide can provide documented assurance that these requirements are being met. Finally, customers have expectations and are entitled to protection under consumer law and common law duty of care.

**What all this means for you, the operator, is that you are responsible for taking reasonable steps to ensure that the right information, briefing and training is provided to the hirer at the right time.** You must maintain an audit trail, some sort of log, to prove that you have done what is required. This can prove invaluable later on, in the event that something does go wrong which results in a customer satisfaction issue or an incident involving the boat or the hire party.

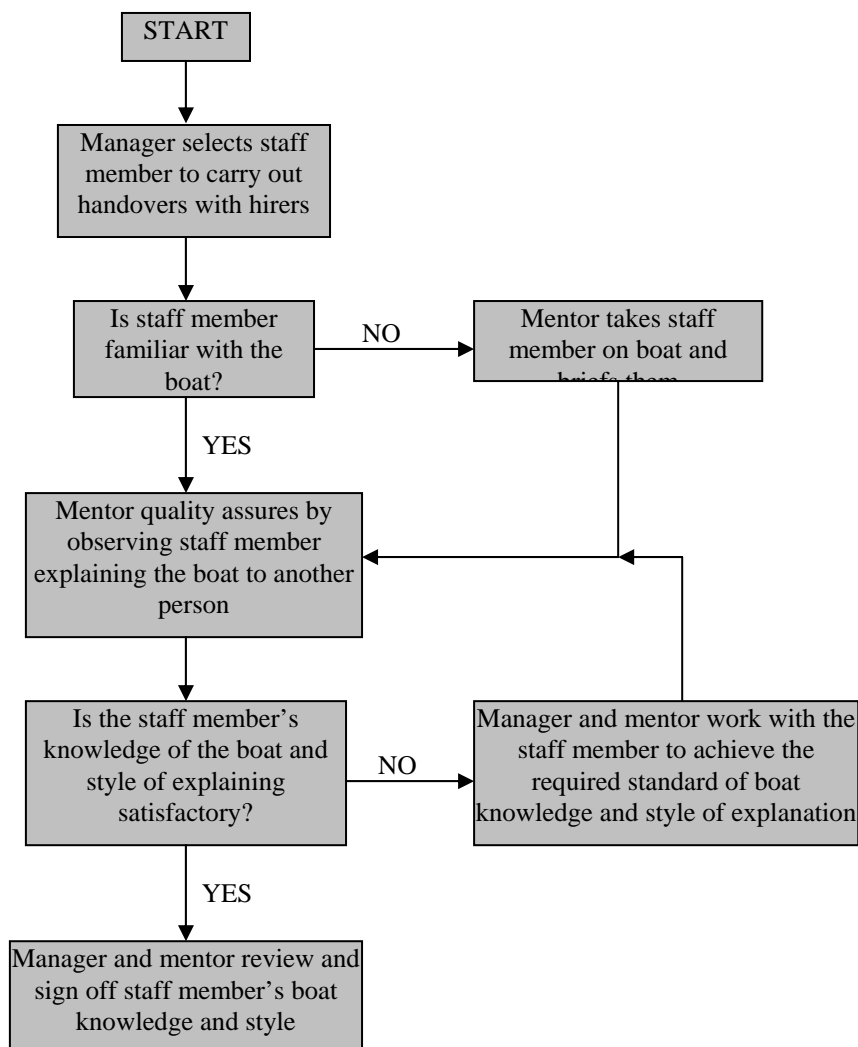
However you decide to proceed, an effective boat handover procedure, properly managed, will help to raise customer satisfaction, keep the boat and passengers safe and reduce the number and cost of call-outs due to problems when cruising. The return on investment for you is that happy customers returning from an enjoyable, problem-free boat hire experience will be even more likely to come back for more and recommend you to their friends.

# How to Set Up a Quality Assured Hire Boat Handover Procedure

## Step 1: Boat Knowledge

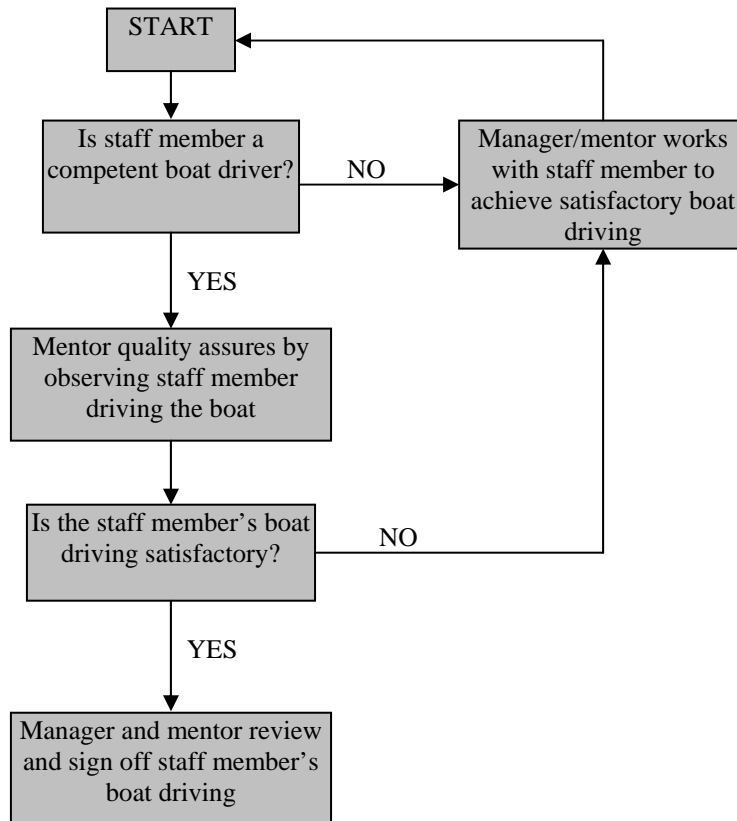
The following diagrams show a method for setting up a quality assured hire boat handover procedure:

The owner/manager of the hire boat business should assess the suitability of staff to carry out hire boat handovers. A good match between the personality of the handover staff and the customer can work wonders for customer satisfaction and help ensure a safe cruise. The condition of the customer on arrival (eg: stressed, relaxed, angry, etc) may influence the choice of handover staff as part of the in-company customer care activity. A straightforward way of quality assuring the boat handover procedure at two levels would be to assign an experienced person to act as mentor to the staff member being trained to carry out boat handovers and for a manager to check and sign off the mentor's work. The manager would also carry out random quality checks by observing training in progress.



## Step 2: Driving the Boat

Having considered boat knowledge, we can now consider driving the boat:



For both flowcharts relating to boat knowledge and boat driving, the owner/manager may wish to consider the range of boat types which are available locally and if differing types are available it may require specific staff for specific boats.

### Step 3: Handing Over to your Customers

The final stage in setting up the handover procedure is to brief staff on the way the handover should be carried out, from the time of arrival at the base to the time of driving the boat away. The most important item to remember is the audit trail. This is the tangible evidence that a handover process has been carried out. In other words, keep a record of everything that has happened with the customer and get it signed for. A sample certificate and other useful documents are included later in this guide.

Some information about your hirers will already have been captured on the booking documentation. Your reception will probably have compiled a list of the day's customers before they arrive. Your customer handling process may include a settling in period.

The basic sequence of events for processing customers should include the following:

	<b>Action</b>	<b>Responsibility</b>	<b>Audit Trail</b>
<b>1</b>	Customer arrives at office/reception to commence handover, booker and parents or guardians of children identified. Names checked to see who's who, any discrepancies resolved.	Reception	Time of check in logged.
<b>2</b>	Customer assigned to boat to unload crew and stow gear.	Reception/Manager	Log time hire party boards the boat. Log sheet handed to handover staff.
<b>3</b>	Members of the party who will drive the boat or assist with boat handling to be identified. Handover staff join the hire party on board for the handover.	Handover staff	Check names of nominated boat drivers and handlers. Log time of starting the handover.
<b>4</b>	Any non-participants in the handover to be safely occupied as required, probably on board the boat.	Handover staff	By observation.
<b>5</b>	The skipper and preferably one other in the party are confident they can drive and assist with the boat. The handover staff must also be satisfied they are sufficiently competent.	Skipper and handover staff	Skipper and handover staff both sign and date the Boat Acceptance Certificate. (** see note)
<b>6</b>	Boat handover completed.	Handover staff and Reception/Manager	Handover staff logs handover completion time on log sheet and files documentation. Copy of boat acceptance cert should be given to skipper.

\*\* Note: If the hire base is located some distance from features that will be encountered by the hirer, such as locks, bridges, tides etc, it may be useful to consider alternative methods of briefing the hirer about these features. Any alternative methods should be noted.

The ultimate decision is whether or not the handover staff are satisfied with the hire party's ability to drive the boat. If the handover staff are not satisfied then management intervention may be required to agree an appropriate course of action.

Every situation will be different. In most cases additional tuition and reassessment should resolve the situation. Ultimately you may decide not to let the boat out. If you decide not to let the boat out, an appropriate note should be written on the Boat Acceptance Certificate and the handover staff should sign it. Whatever you decide to do make sure you maintain the audit trail. Always write an appropriate note in the log.

## Step 4: Providing Information

The next step is to decide what information the hire operator should provide to the hirer and when it should be provided. Operators whose bookings are managed by a booking agent should find out what information the agent will provide to the hirer and when. It makes sense for the operator and agent to work together to avoid confusing the hirer, duplicating effort, or missing something out.

Procedures for delivering information to the hirer will vary from one operator to another, for example, confirmation of bookings may be sent out separately from pre-holiday information or bookings may increasingly be made over internet. Whatever your procedure it is important to maintain the audit trail by making one or more appropriate log entries.

A typical information flow might include the following:

	<b>Action</b>	<b>Outcome</b>	<b>Responsibility</b>	<b>Audit Trail</b>
<b>1</b>	Brochure request or mailing.	Brochure with Terms and Conditions and booking form sent to named individuals.	Operator/Agent	Entry in database or on log sheet.
<b>2</b>	Booking.	Booking form completed and returned.	Booker and Operator/Agent	Booking form on file. *
<b>3</b>	Booking confirmed.	Booker receives confirmation and pre-holiday information.	Operator/Agent	Log entry or entries.
<b>4</b>	Booker and party arrive at hire base to start holiday. **	Handover completed.	Reception and Handover Staff	Signed log entries. Appropriate boxes ticked off on the Boat Acceptance Certificate. Signed Boat Acceptance Certificate on file.
<b>5</b>	Booker and party drive boat away from base.	On-board information pack and notices are present.	Handover Staff and Manager	

\* The growth of on-line bookings and credit card payment has changed the way that bookings are taken. You may not end up with a paper booking form signed by the booker. You should ensure that an appropriate database entry or completed computer form is held on file. Make sure that the hire terms and conditions can be applied irrespective of the booking method.

\*\* Care should be taken to ensure that if the booker who has signed to agree to terms and conditions is not present during handover that terms and conditions of booking are highlighted to skipper and he/she signs to agree to those terms.

Information changes over time so always endeavour to use the latest material when it becomes available. The navigation authorities publish leaflets, posters, booklets, videos and CD-ROMs that deal with aspects of using the inland waterways, like observing the “rules of the road”, navigating waterway features such as locks, safety and courtesy. For example, in 2002 British Waterways and the Environment Agency published ‘The Boater’s Handbook’, a guide to basic boat handling and safety. These publications will quite naturally be subject to review and may be updated from time to time.

It is also important for operators to use their local knowledge to decide what pre-holiday information would be of most benefit to hirers holidaying on their particular section of the waterway network with their particular style of boat. The objective is to make sure the hirers are provided with the information they need to have an enjoyable and safe holiday experience.

## **Sample Documentation**

At this point you might find it useful to consider some samples of forms and other documents used by BMF members to inform customers and contribute to the quality audit trail. These samples have been created especially for this guide based on comparisons of documents in use by a cross section of Operators. The end result is a set of 'composite' documents that can be adapted to suit your own needs.

The documents included for your information are as follows:

- Holiday terms and conditions
- Booking confirmation
- Customer log sheet
- Boat acceptance certificate
- Boat manual (sections)
- Quality feedback form

Please refer to the appendix for samples of all these documents.

Please note that these are suggestions only and operators will need to ensure that their own documentation meets the needs of their particular business.

## Hire Parties with Special Needs

You may be required to provide a boat to a hire party that includes someone with special needs. You should ensure that the hirer accepts responsibility for the care and safety of all the party members.

The National Community Boats Association (NCBA) provide two useful guides – ‘The Lifejacket’, a guide to running a community boat project, and ‘Disabled People Boating? No Problem’ a guide suggesting ways to accommodate people with physical disabilities on boats.

The NCBA also take individual enquiries, and offer specific advice in this area.

National Community Boats Association  
British Waterways Clock Tower  
Atherstone Road  
Hartshill  
Warwickshire  
CV10 0TB  
Tel: 024 7639 7400  
Fax: 024 7639 2611  
staff@national-cba.co.uk  
www.national-cba.co.uk



## **BMF's External Audit Service**

BMF can help you to validate the boat handover process you have implemented in your company through an external audit. It can provide a certificate of compliance if your handover procedure conforms to the standards set out in this boat handover guide.

The external audit would require the operator to:

- Complete a self analysis pro-forma before applying for the audit; this self-administered 'health check' will help the operator to decide whether to proceed right away or whether some development work is required first.
- Compile a portfolio of evidence to demonstrate the audit trail; this means proving that the handover process is in place by collecting together samples of all the company documents used to support all parts of the audit trail.
- Allow BMF to carry out an external audit comprising an initial review of sample paperwork followed by a visit.
- Agree to a random spot check by BMF after you have passed the external audit – this means being prepared to accept an unannounced visit by a member of the BMF team to verify that you are continuing to maintain the standard.

The BMF auditor will complete a standardised checklist to document their findings. A copy of the checklist, signed and dated by both parties, will be provided to the operator concerned as a record of the audit and a second copy will be held on file as 'commercial in confidence' by BMF.

Any operator whose handover process meets the standard in full will be issued with a numbered and dated certificate of conformity published by BMF. The certificate will be valid for three years and will have an expiry date. The certificate will remain the property of BMF and may be withdrawn if the operator's handover procedure falls below the standard.

Any operator whose handover process does not meet the standard in full will be given the opportunity to spend time working on the non-conforming items highlighted in the checklist before applying for re-auditing. BMF reserves the right to apply reasonable time limits to applications for re-auditing and to refuse to accept re-applications if it feels it would be appropriate to do so.

In the event of a dispute an appeal may be made in writing to the BMF's Executive Director.

## **Appendix**

### **Sample documentation**

Examples of documentation

1. Hire terms and conditions
2. Customer log sheet
3. Boat acceptance certificate
4. Boat manual (headings)
5. Quality feedback form

## **1. Hire Terms and Conditions**

Hire terms and conditions will vary from one hire business to another due to differences in the way the businesses have been constituted and the way they are managed. BMF associations have developed a standard set of hire terms and conditions that can be adapted to suit.

Most hire terms and conditions follow roughly the same structure with these sorts of headings:

- Definitions
- Booking agreement
- Age and any other limits
- Cancellation and changes
- Hire period, collection and return of boat
- Prices and payment
- Insurance and damage waiver
- Safety and other rules
- Accidents
- Maintenance, repairs, damage and breakdown
- Hirer's property
- Fuel
- Pets
- Complaints
- Exemption
- Brochure
- Disputes
- Jurisdiction
- Waiver

## 2. Customer Log Sheet

Here is an outline of the information that should be included on the customer log sheet. An example is shown on the next page. You may have developed a more comprehensive log sheet of your own. This example suggests the minimum of information that should be recorded to satisfy the handover procedure's audit trail. If the information is not recorded on the log sheet you should ensure that it is recorded elsewhere in your documentation. If in doubt about anything, write a note on the log sheet, it may prove useful later on.

- Name of boat
- Name of booker
- Date
- Names of all other persons in the hire party, (if not already on file).
- Name of skipper
- Record ages of any party members who are under eighteen years of age
- Time of arrival
- Name of handover staff
- Time taken on board
- Time handover started. This may be later than the time taken on board due to any time spent on stowing gear and settling in.
- Time handover completed. In conjunction with time that the handover was started this will demonstrate exactly how much time was taken to perform the handover with this particular hire party. Over time you should see a pattern emerging that demonstrates your handover process accounts for the differing needs of different hire parties.
- Reminder: Boat Acceptance Certificate to be completed and signed by both the booker and handover staff.
- Leave plenty of space for written notes. If management intervention is required, for example due to more time needing to be spent on handover, note down what and why and get another member of staff, preferably a manager, to countersign the note.
- Signed by boat handover staff.

Other information that may be useful includes car registration numbers, mobile phone numbers, etc.

## Customer Log Sheet

Name of Boat being Hired	
Dates of Hire Period	
Lead Booking Name	
<div style="font-size: 4em; font-family: cursive; margin-bottom: 20px;">Sar</div> Names of Other Guests in Party	
Mobile Telephone Number	
Car Registration Number	
Main Driver of Boat	
Names and Ages of Children under 18 in Party	
Time of Arrival	
Name of Handover Staff	
Time Taken On Board	
Time Handover Started	
Time Handover Completed	
Boat Acceptance Certificate Signed by skipper and Handover Staff	

Notes

### 3. Boat Acceptance Certificate

Boat acceptance certificates vary from company to company and waterway to waterway. The suggestions below might form a generic model and will need to be fleshed out to meet local and specific needs of individual operators.

The boat acceptance certificate covers fire-fighting equipment in the list of tick boxes. The handover staff should draw the hirers' attention to the location of the fire-fighting equipment and explain how it works.

Your booking form should contain a section for the booker to order lifejackets of the appropriate size for each intended wearer. The boat acceptance certificate also covers lifejackets. As a minimum all non-swimmers and children should be issued with lifejackets to wear at all times when on deck. Further guidance on issue of lifejackets may vary on different waterways. Your handover staff should show the hire party how to wear the lifejackets correctly.

Items that must be included in boat acceptance certificate:

- Safety on Board
  - People on deck
  - Falling overboard
  - Life jackets/buoyancy aids
  - Fire extinguishers
- Boat Handling
  - Boat manual
  - Other waterway users
  - Steering, stopping & mooring
- Engine
  - Maintenance
  - Controls
- Appliances on board
  - Gas
  - Electric
  - Toilets
- Environment
  - Speed limits
  - Rubbish/litter
  - Reeds/shallow water
- Contact details
  - Breakdown
  - Emergency
  - Accident
- Waterways features
  - Locks
  - Swing bridges
  - Tides
- Conditions of boat
  - Return time & state of boat

## 4. Boat Manual

The boat manual is both the ‘user guide’ and ‘reference manual’ that will inform your hirer and steer them through any problems whilst cruising. A good boat manual placed on board the boat will enhance the boating experience and safety for the hirer and make your life easier by reducing the need for support from you and your staff. In effect it’s the ‘front line support’ mechanism for your customers once they have started cruising.

The boat manual is an ideal method for delivering information about leisure attractions, waterside pubs and restaurants and also the operating notes for the boat and safety advice for the hire party. The core information for all boat manuals will probably be much the same. The example set out here includes local knowledge built up by the hire operator and information from the local region of the navigation authority.

Listed below are suggested headings for a generic boat manual:

- Welcome Aboard – general introduction
- How to get help – details of local navigation authorities and boat yard contact details etc
- Useful information – consider what will be of interest to your hirers eg cycling, fishing, crime prevention, etc
- Safety advice – outline basic safety advice and highlight some of common causes of accidents
- Further info and advice – the list below gives examples of the information which you may wish to also include in a boat manual:
  - Who to obey (operator’s staff, waterways staff, canal trust staff)
  - Personal safety rules
  - Safety on the move
  - Steering position
  - Life jackets
  - Drink and drugs
  - Speed
  - Rules of the road
  - After dark and in fog
  - Mooring
  - Ropes
  - Going aground, getting off again
  - Fouled propeller, checking weed hatch, properly replacing the hatch, what to do if fouled
  - Tunnels
  - Rivers, currents, weirs, anchor, risks of overnight mooring
  - Commercial waterways
  - Tidal waters
  - Locks, warnings and general safety, what to do if something goes wrong, rules, paddle gear
  - Swing bridges, how to work them, what can go wrong, how to put it right
  - Electric bridges

- How your boat works: the following headings relate to the operation of the on-board equipment and services:
  - Water
  - Toilets
  - Shower
  - Diesel fuel
  - Gas system and gas safety, especially ventilators and carbon monoxide poisoning
  - Landlord's safety check
  - Portable gas cylinders, barbecues
  - Cooker
  - Hot water and central heating
  - Electrical faults, ammeter, charging, fuses
  - Engine, starting, moving off, forward, reverse, controlling speed
  - Daily maintenance routine
  - How to temporarily repair a broken window
  - Water in the boat
  - Steering
  - Pump out stations and gas suppliers
  - Inventory for \_\_\_\_ persons
  - Waterway contacts and emergency phone numbers
  - Safety information notice(s) from the local navigation authority
  - Instructions for TV and video
  - Pets
  - Marketing pack concerning any arrangements with pubs, restaurants or other businesses

## 5 Quality Feedback Form

It is always worth giving hirers the opportunity to provide feedback on their experience to capture both the positive and negative.

Example

Thank you for choosing \_\_\_\_\_ (operator's name) for your holiday. We hope that you have enjoyed your cruise with us. Please tell us about it by filling in this short questionnaire. We will use the feedback to help us maintain the high standards that we know are important to you.

Boat Name \_\_\_\_\_ Date \_\_\_\_\_

When you collected your Boat:	Very good	Good	Satisfactory	Poor
Cleanliness				
Design & Accommodation				
Instruction				
Reliability				
Staff				

Any additional comments:

Thank you and we hope to see you again

(name of owners/managers)

## Useful Addresses

### Association of Pleasure Craft Operators

Marine House  
Thorpe Lea Road  
Egham  
Surrey  
TW20 8BF  
☎ 01327 340174  
✉ apco@britishmarine.co.uk  
www.britishmarine.co.uk

### British Marine Federation

Marine House  
Thorpe Lea Road  
Egham  
Surrey  
TW20 8BF  
☎ 01784 473377  
✉ training@britishmarine.co.uk  
www.britishmarine.co.uk

### British Waterways

Willow Grange  
Church Road  
Watford  
Hertfordshire  
WD1 3QA  
☎ 01923 226422  
✉ enquiries@britishwaterways.co.uk  
www.britishwaterways.co.uk

### Broads Authority

Thomas Harvey House  
18 Colegate  
Norwich  
NR3 1BQ  
☎ 01603 610734  
✉ webenquiries@broads-authority.gov.uk  
www.broads-authority.gov.uk

### Broads Hire Boat Federation

c/o British Marine Federation  
Marine House  
Thorpe Lea Road  
Egham  
Surrey  
TW20 8BF  
☎ 01485 533280  
✉ cdcleisure@aol.com  
www.britishmarine.co.uk

**Environment Agency**

Rio House

Waterside Drive

Aztec West

Almondsbury

Bristol

BS32 4UD

☎ 0845 9333111

💻 Via filling in a form on the website

[www.environment-agency.gov.uk](http://www.environment-agency.gov.uk)

**Thames Hire Cruiser Federation**

c/o British Marine Federation

Marine House

Thorpe Lea Road

Egham

Surrey

TW20 8BF

☎ 020 8979 1997

💻 [psia@lineone.net](mailto:psia@lineone.net)

[www.britishmarine.co.uk](http://www.britishmarine.co.uk)

# AUDIT PACK

## FOR

# HIRE BOAT HANDOVER



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## **An Introduction to the BMF's Hire Boat Handover Audit Service**

BMF's Training Department has been involved in the development of the Occupational Standards, National Vocational Qualifications (and their equivalent in Scotland), and Modern Apprenticeship for the leisure marine and small workboat sectors in England and Wales. We have developed short courses for BMF members on customer service, health and safety (risk assessment), technical subjects, exhibiting at boat shows, selling skills, and the exporting. Please telephone 01784 473377 for information.

Subject to agreement, BMF's Training Department can help hire boat operators to validate the boat handover process they have implemented in their company through an external audit. The external audit is based on the content of the "National Guide to Hire Boat Handover". It can provide a certificate of compliance if the handover procedure conforms to the standards set out in the guide.

If you do not have a copy of the National Guide to Hire Boat Handover you can obtain one free of charge from the BMF website – [www.britishmarine.co.uk/training](http://www.britishmarine.co.uk/training) then click on the link for Hire Boat Handover Auditing. Alternatively please email [training@britishmarine.co.uk](mailto:training@britishmarine.co.uk) or phone on 01784 473377.

The National Guide to Hire Boat Handover was written to help hire boat operators to promote safe enjoyment of the inland waterways and has the full endorsement of British Waterways. The guide draws together good practice from real experience of BMF members in the UK and is appropriate for operators providing holiday hire boats for short breaks or longer cruises.

If you still need more information after reading this pack or would like a confidential discussion of your needs please contact BMF Training by phoning on 01784 473377, by e-mail at [training@britishmarine.co.uk](mailto:training@britishmarine.co.uk), or by fax on 01784 439678.

## **How To Use This Pack**

This audit pack has been designed for use in conjunction with the National Guide to Hire Boat Handover. It does not stand alone.

Use the self-analysis form contained in this audit pack to “health-check” your company’s hire boat handover procedure in comparison with the standard that has been laid down in the guide. Make sure you can collect together the portfolio of supporting evidence listed later in this pack. The external auditor will expect to see this.

Be objective. Use the self-analysis form and the portfolio of evidence to identify any areas that would benefit from further development. Take action to modify your procedures and documentation if necessary. Make sure any modifications are understood and operated effectively by all staff involved. If the person completing the self-analysis form is the owner or manager of the hire base you should consider asking your handover staff to review with you what you have filled in on the form to ensure that you have captured all the evidence that is available in your hire operation.

When you feel your procedure fully meets the standard and all the supporting evidence is available for scrutiny, fill in the booking form contained in this pack and send it to BMF Training at the address printed on the form. You should also include a copy of your self-analysis form and your portfolio of sample documentation.

After receiving the booking form BMF Training will contact you to arrange for an auditor to visit your hire-base and carry out the audit. Any arrangements made by BMF Training will be confirmed in writing.

If you need to contact BMF Training, phone us on 01784 473377, or send an e-mail to [training@britishmarine.co.uk](mailto:training@britishmarine.co.uk), or fax us on 01784 439678.

## **Fees and Expenses**

A fee will be charged for the BMF’s external audit service. BMF members will receive a preferential rate as part of their membership benefits. Operators with multiple sites should discuss their needs with the BMF Director of Training Services to agree a suitable approach.

The fee per single audit visit or re-visit, to one hire base, is £125 +VAT, including all auditor expenses, for BMF members. The fee for non-members is £195 +VAT. Prices subject to change from time to time at the discretion of the BMF. Prices correct at time of going to press.

Please read this important note: The fees for a re-visit would apply, for example, to instances where the external auditor has been invited to return to the hire base to carry out another audit because the first visit produced a negative result or because the three year accreditation period has expired. Random spot checks will not be charged for.

## What the BMF's External Audit Covers

Here is what you can expect from the BMF's external audit. This section sets out the terms and conditions so please read it carefully. The information on "Fees and Expenses" contained on page 5 in this audit pack forms part of the terms and conditions. The external audit requires the hire boat operator to:

- Complete the self-analysis pro-forma contained in this pack before applying for the audit. This self-administered "health check" will help you to decide whether to proceed right away or whether some development work is required first.
- Compile a portfolio of evidence to demonstrate the quality audit trail. This means proving that the handover process is in place by collecting together samples of all the company documents used to support all parts of the quality audit trail. Blank documents will not be accepted. You will need to present copies of actual records that have been completed by your staff and customers. The self-analysis pro-forma details the minimum requirements for your portfolio.
- Send a copy of your self-analysis pro-forma and the portfolio of sample documentation to BMF for initial review.
- Invite a member of the BMF Training team or their representative to visit your hire base to observe your boat handover at first hand, and to sample the quality audit trail by inspecting relevant records, including a boat manual. These items can be carried out simultaneously.
- Agree to a random spot check by BMF Training. After you have passed the external audit, this means being prepared to accept an unannounced audit visit by a member of the BMF Training team or their representative.

The BMF Training team member or their representative appointed to carry out your external audit will complete a standardised checklist to document their findings. A copy of the checklist, signed and dated by both parties, will be provided to the operator concerned as a record of the audit and the original will be held on file as "commercial in confidence" by BMF Training. BMF Training will not disclose any information that it obtains in the course of delivering the audit service to anyone else.

Any operator whose handover process meets the standard in full will be issued with a numbered and dated certificate of conformity published by BMF Training. The certificate will be valid for three years and will have an expiry date. The certificate will remain the property of BMF Training and may be withdrawn if the operator's handover procedure falls below the standard. Any operator whose handover process does not meet the standard in full will be given the opportunity to spend time working on the non-conforming items highlighted in the checklist before applying for re-auditing. This will incur another audit fee. BMF Training reserves the right to apply reasonable time limits to applications for re-auditing and to refuse to accept re-applications if it feels it would be appropriate to do so.

BMF Training will levy charges for the external audit or re-audit. Prices will be subject to change from time to time. Random spot checks will not be charged for. In the event of a dispute an appeal may be made in writing within twenty one days of the audit visit or re-visit to the BMF's Executive Director whose decision will be final and binding.

## Self-Analysis Form for Hire Boat Handover Procedures

This form is to help you decide if your hire base is ready for an external audit by the BMF. You may like to make photocopies of this form so that the audit pack remains intact for future use. Circle the response “Y” or “N” that applies to each question as appropriate. If there is not enough room here continue on separate sheets and staple them to this form. If you are unsure how to answer refer to the “National Guide to Hire Boat Handover” for information.

Name of Hire Base	
Name of Person Completing this Pro-Forma	
Position	
Signature	
Date	

Name of Boat Handover Staff	Boat Knowledge Acceptable?	Style of Explaining Acceptable?	Boat Driving Acceptable?
	Y / N	Y / N	Y / N
	Y / N	Y / N	Y / N
	Y / N	Y / N	Y / N
	Y / N	Y / N	Y / N

If the answer to any of these questions is “NO” you will need to take appropriate action. Refer to the relevant sections in the “National Guide to Hire Boat Handover” to see what action to take. Make notes here:

Action Taken	By Whom?	When?	Outcome

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 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 explain					

If you are not able to answer this question refer to the handover guide for suggestions. Make notes here:

Action Taken	By Whom?	When?	Outcome

Are the hirers briefed on:

Their Boat	Y / N	Their Route	Y / N	The Boat Manual	Y / N	Safety Information	Y / N
Other – Please explain							

If the answer to any of these questions is “NO” you will need to take appropriate action. Refer to the relevant sections in the “National Guide to Hire Boat Handover” to see what action to take. Make notes here:

Action Taken	By Whom?	When?	Outcome

Is a Boat Acceptance Certificate used with all hire parties starting from this base?

Y / N
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If you answered "NO" to this question please explain here what you do instead:

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Are bookings for this base supplied by a third party:

Booking Agencies	Y / N	Travel Agents	Y / N
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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 British Waterways/Broads Authority/Environment Agency		
British Waterways/Environment Agency Boater's Handbook – Basic Boat-Handling and Safety		
Others – Please specify		

Are all hire boats setting out from this base equipped with a boat manual containing operating notes for the boat and safety advice for the hire party?

Y / N
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If you answered "NO" to this question please explain here what you do instead:

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

Y / N
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If you answered "NO" or are not sure how to answer this question refer to the Handover Guide for clarification.

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The quality audit trail: 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 BMF Handover Procedures. The portfolio contains 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
	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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*Please note that the Boat Manual also forms part of the quality audit trail, however this is not required to be included in the portfolio of evidence sent to BMF prior to your audit. It will be inspected during the audit.*

Additional evidence: If you feel there is something worth noting that would help you to establish compliance in the eyes of the auditor please say so here

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## Booking Form for BMF Hire Boat Handover External Audit

Contact Name	
Contact Telephone Number	
Email Address	
Business Name and Address	
Postcode	
Name and address of site to be audited, if different from above	
Contact Name on site to be audited	
Telephone Number	
Email Address	

- BMF Members – I have enclosed a cheque made payable to the British Marine Federation for the sum of £146.88 (£125.00 +VAT) to cover the full cost of the audit.
- Non Members – I have enclosed a cheque made payable to the British Marine Federation for the sum of £229.13 (£195 +VAT) to cover the full cost of the audit.

Please include the following documentation with your booking form:

- Audit Pack Self Analysis Form
- Brochure
- Hire Terms and Conditions
- Booking Form
- Boat Acceptance Certificate
- Customer Log Sheet – or equivalent documentation
- Quality Feedback Form
- Any other relevant documentation

\* If any of the documentation above is not applicable at your base, please just send the documentation in use.

I understand that BMF Training will contact me to arrange a suitable date for the audit visit and they will confirm it in writing.

Signature		Date	
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**Send the completed form and cheque to:**

Liv Whetmore, British Marine Federation, Marine House, Thorpe Lea Road, Egham, Surrey, TW20 8BF