

# Checklist - planning and preparations

## General information

School/Group

Details of Visit/Activity

Dates (DD/MM/YYYY)

From:

To:

Group Leader/Contact

## Planning

The first step in planning an activity is to produce an outline proposal to the head teacher or governing body/ LEA seeking approval in principle. Proposals might include:

- Activities' objectives
- Likely date, duration, venue
- Pupil group, staffing
- Resources, estimate of costs

Contact venue; establish why it is considered to be suitable for the group?

What are the transport options?

Who leads the group and who would help to supervise it?

Who pays for the visit?

Undertake a risk assessment, exploratory visit.

Deliver proposal to head teacher, governing body, and/or LEA to include

- Details of dates
- Risk assessment
- Emergency procedures
- Transport
- Insurance
- Costs
- Any group membership advantages/requirements
- Staffing

Obtain approval to prepare the visit subject to satisfactory preparation.

## Educational purpose

What are the principle learning goals of the visit?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Does the activity have other purposes for example social, cultural or well being/physical? Yes / No

If Yes please list:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Timing

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Any off-site activity will involve a degree of planning. This will take time. Rushing things can lead to unanticipated problems and dangers.

Construct a list of what has to be done and by when?

Allowed enough time, being realistic how much time is required bearing in mind approvals, parental response and checking venues?

Who can you call on for assistance in completing the preparation for example colleagues in your school, others schools, the venue provider or tour operator?

1. \_\_\_\_\_
2. \_\_\_\_\_

## Safety, emergencies & first aid

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Have you assessed the risks associated with your proposed activities and made arrangements to minimize these risks? Yes / No

Are you developing a culture and expectation of safe practice among the staff and young people involved? Yes / No

Have you thought through emergency procedures? Yes/ No

See the Emergencies Checklist.

Will you have sufficiently ready access to first aid facilities and expertise? Yes / No

## Venues

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Do you know enough about them to ensure safety and educational effectiveness? Yes / No

Are you familiar with the guideline/license requirements of certain venues? Yes / No

See the Venues Checklist.

## Programme & activities

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How will the planned programme meet your educational objectives?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Approval

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Are you clear about the approvals necessary before the activity can go ahead? Yes / No

How much time is required to prepare the approval request?

How long will the approval take to be granted?

Have you set the necessary wheels in motion in sufficient time? Yes / No

See Approvals Checklist.

## Supervision & staffing ratios

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Do you know about and have you checked that you are in line with any young person/teacher/youth worker ratios required or advised?  
Yes / No

Requirements aside, are you confident that the young people involved on this activity can be adequately supervised - both during the activity and travelling to and from the activity? Yes / No

Have you checked the supervision requirements of the venue/location to be visited? Yes / No

Are you clear that not only the amount but also the nature, gender and qualifications of those supervising are appropriate? Yes / No

Have you made arrangements that heads will be counted at critical times such as arrival and departure from the venues? Yes / No

Have you thought through how that should be done and by who? Are the nominated individuals sufficiently competent to undertake what they are being appointed to do? Yes / No

Has everybody involved directly and indirectly been appropriately briefed? Yes / No

Have you checked that everyone know what they should do and when? Yes / No

Has any adult with the party who is not a member of staff at your school been vetted? Yes / No

## Parental consent and information

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This is necessary for anything outside of the published curriculum.

Have you asked for parental consent on the right form and in the right way? Yes / No

Have you checked your school's or education authority's detailed guidance on this? Yes / No

Have you allowed parents sufficient time and provided them with enough information to allow them to make an objective decision about whether they want their children to attend or not? Yes / No

Have you a strategy for chasing parent consent forms bearing in mind possibly diverse family situations? Yes / No

Have you informed parents of a code of conduct and who will meet the cost of a pupil returning early? Yes / No

Have parents been informed about the arrangements for insurance and the nature and extent of the cover? Yes / No

Do you know enough about any medical conditions that young people might have to enable you to look after them appropriately? Yes / No

Do you have permission from parents to agree to medical treatment for their children in an emergency? Yes / No

Have you asked parents to provide emergency contact numbers? Yes / No

Do parents have a contact number? Yes / No

Have you made arrangements for parental consent and information for parents for whom English is not a first language? Yes / No

See Template for Parental Consent for a School Visit.

## Travel arrangements

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Have you made sufficient, appropriate and safe arrangements? Yes / No

Will you have the correct supervision ratios? Yes / No

There is a wide range of statutory and LEA regulations regarding the use of minibuses and coaches. Have you checked these? Yes/ No

These are often changed. Check your school/Education Authority advice and regulations to make sure that your arrangements comply.

Have you checked that the form of transport being used is properly insured? Yes / No

How long will the journey be, (including transfers to venue for ports or airports) \_\_\_\_\_

Is it too long for comfort and safety of both driver and pupils? Yes / No

If Yes what can be done to mitigate the problem?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Tired young people are more at risk than others.

Chubb. Insured.<sup>SM</sup>