

Visit Leader Preparation and Planning checklist

The preparation, planning, execution and evaluation of an excursion can be broken down into a number of phases. The checklist below will help the Visit leader keep track of the tasks which need to be undertaken and who is undertaking them.

Phase 1

Actions	Name	Date
Trip category- see p11 Excursions Procedures		
Attendance of Overseas Adventurous Excursion Training		
Learning intentions agreed		
Initial HofE approval sought		
Staffing & roles agreed		
Provisional dates agreed		
Initial admin and financial requirements clarified		
Pupil interest assessed		

Phase 2

Actions	Name	Date
Provisional research and bookings made - Venues - Accommodation - Travel & Transportation - Providers - Services & Resources - Impact of ASN		
Information logged on Evolve		
Advance information to parents plus pupil equipment list sent		
Parents evening briefing		
Information to parents on financial impact of a cancellation which was not covered by the trip insurance		

Phase 3

Actions	Name	Date
Complete risk assessments - Generic - Site specific - Activity specific		
Security arrangements - Venues - Accommodation - Travel/transport - Providers/partners - Foreign & Commonwealth Office website consulted		

Insurance arrangements- Council and/or Provider		
Base contact arrangements established		
Risk Management Officer consulted		
Contingencies plan created		
Parental consent forms sent		
Financial arrangements in place		
Information sent to Safety Consultant where applicable		
Evolve updated & submitted for scrutiny & approval		

Phase 4

Actions	Name	Date
Participants established		
Parental consents matched to pupils		
Individual and group needs identified		
Medical & dietary needs identified (Parental consents and SEEMIS)		
ASN integrated		
Guidance staff consulted		
Staffing ratios established including PSWs as required		
Confirm bookings: - Venues - Accommodation - Travel & Transport - Providers - Services/resources - Currency - ASN provision if appropriate		
Plans conform to Excursion Procedures		
Prepare teaching materials specific to event		
Clarify staff roles & interim tasks		
Finalised visit plan submitted to HT for authorisation		

Phase 5

Actions	Name	Date
Full details/files provided for the base contact and HT		
Excursion staff briefed and issued with documentation		
Participants briefed		
Resources checked – party & individual		
Medical and dietary conditions update		

Phase 6

Actions	Name	Date
Roll call and management arrangements		

Weather or other plan alternating factors considered/implemented		
Contingency plans clarified		
Ongoing briefing to participants		
Ongoing dynamic risk assessments		
Equipment return		
Review and feedback		
Excursion evaluation recorded on Evolve against the trip		