# Offsite Visit Planning Checklist

This checklist is intended for use as an aide-memoir for the main elements of visit organisation as set out in the Educational Visits guidance. This checklist should be completed by the Visit Leader AND checked by the EVC and Headteacher prior to submitting the trip for LA approval.

|  | **Evidence required** | **Evidence available** |
| --- | --- | --- |
| **Approval** |  |  |
| Have you gained approval from Head/Governors (and LA if required) prior to making any financial commitment? | Confirmation date: | Y / N |
| **Visit type and date** |
| Have you read and understood the Establishments Offsite Activities Policy and SBC 031 Offsite Activities Code of Practice and associated documents? | confirmation | Y / N  |
| Have you read and understood relevant guidance for the type of activity/trip (Evolve Library and Outdoor Education Advisers Panel ‘National Guidance’) | confirmation | Y / N  |
| Type of trip:Overseas (LA approval)Residential (LA approval)Adventurous (LA approval)Adventurous led by establishment staff (LA approval) London trip (LA approval)None of the above (Head teacher approval/EVC approval) | On the Evolve entry  | Y / N |
| Visit Leader name / gender / contact details | On the Evolve entry | Y / N |
| Attendee group (age groups/Key Stage levels) | On the Evolve entry | Y / N |
| Attendee number / intended attendees / gender  | On the Evolve entry | Y / N |
| EVC Details | On the Evolve entry | Y / N |
| Staff numbers/names* Are adequate staffing numbers available, taking into account any special needs?
* Have you checked the advice on typical young person?
* Are staff competent for their roles on the visit?
* If establishment staff are planning to lead activities which require LA approval, have they obtained LA leader approval?
* Are any of the activities offered licensable under the Adventure Activities Licensing Regulations, 1996 (AALA)?
* If so, is the provider licenced by the Adventure Activities Licensing Authority to provide these?
* Does the visit involve young people working without the direct supervision of staff at any time?
 | On the Evolve entry  | Y / N |
| Volunteer’s numbers/names* Are voluntary helpers being used? Are they appropriate? Are they insured, by being entered on the school/centre list of voluntary helpers? Are they aware of their responsibilities?
* Is a police check necessary for your helpers under the Child Protection Act?
 | On the Evolve entry **AND** staff rota | Y / N |
| Staffing total (staff and volunteers) | On the Evolve entry | Y / N |
| If the supplier/provider is a LOTC registered provider,please confirm you have been provided with the following documents and they are current:* Supplier/providers policies
* risk assessments
* insurance
* qualifications etc
 | On the Evolve entry | Y / N / N/A |
| If the supplier/provider is not an LOTC registered provider and holds an AALA (Adventurous Activity Licence Authority) licence (and/or any other accreditation), please ensure they complete the ‘FORM 031B Offsite Activities Provider Form’ | FORM 031B Offsite Activities Provider Form  | Y / N / N/A |
| Address of supplier/provider | On the Evolve entry | Y / N |
| **Travel arrangements** |
| Travel method:Coach (risk assessments, insurance, maintenance, drivers suitability, drivers hours, adequate stops, eating and care arrangements en route)Establishment mini-bus (risk assessment, drivers suitability/health, pre-use checks, driving license, Minibus MOT/maintenance/insurance)WalkingTrainsPlanesAutomobiles (risk assessment, drivers suitability/health, pre-use checks, driving license, car MOT/maintenance/insurance)Ferry | On the Evolve entry **AND** risk assessment **AND** confirmation | Y / N |
| Travel companyPlease confirm you have been provided with the following documents and they are current:* Supplier/providers policies
* risk assessments
* insurance
* qualifications etc.
 | On the Evolve entry **AND** confirmation  | Y / N / N/A |
| **Purpose and Activities** |
| Where is the visit taking place and when? | On the Evolve entry | Y / N |
| What are the aims of the visit? (primary and secondary purpose for undertaking trip and intended outcome) | On the Evolve entry | Y / N |
| Are venue, activities and time of year appropriate to aims and age/ability of group? | On the Evolve entry | Y / N |
| **Visit information** |
| Departure time and date from school | On the Evolve entry | Y / N |
| Arrival time and date to school | On the Evolve entry | Y / N |
| **Risk Assessments** |
| Have you carried out an exploratory visit?* Do you need to visit?
* Has the school visited before?
* (suitability/fire precautions and certification/fire drill/young people security etc.)
* Can you speak to another school that may have recently visited?
 | confirmation | Y / N / N/A |
| Event specific risk assessment/s applicable to this visit /activities:* What are the main hazards?
* Proportionate to the trip
* Are the main hazards covered by the school/centre risk assessment for this type of activity/visit?
* If there are additional hazards and safety measures above and beyond the risk assessment, have you completed a specific risk assessment that details these additional risks and safety measures?
* Have you taken account of any special needs of young people/staff?
* Have you made all staff (including independent providers) aware of relevant special needs?
* Have you planned 'Down-time' arrangements?
* Have you made appropriate medical arrangements, including first aid?
* Have you planned what to do in the event of an emergency during the visit?
* Have you established appropriate emergency contacts (24 hrs) with your base establishment and parents/carers? County press/media officer?
* Have you set up effective communication procedures with the group?
* Have you discussed and shared these with other leaders and young people with suitable records?
* What is the process for reporting any accidents and incidents?
* Are there any special needs, any special dietary requirements?
 | Risk assessment **AND** further documents where required | Y / N |
| Have you planned alternative activities (Plan B) in case you need to abandon your planned programme for any reason? | Risk Assessment | Y / N |
| **Other documents as applicable (confirmation is required that this is in place)** |
| letter to parents | confirmation | Y / N / N/A |
| consent forms for each activity or whole trip listing all the activities | confirmation | Y / N / N/A |
| presentation to parents (residential trips) | confirmation | Y / N / N/A |
| equipment list | confirmation | Y / N / N/A |
| clothing listAre clothing and equipment appropriate to the activities and location?Has young peoples' essential clothing been checked? | confirmation | Y / N / N/A |
| Agreed standards of behaviour and conduct | confirmation | Y / N / N/A |
| mobile phone policy | confirmation | Y / N / N/A |
| School insurance documents provided to parents | confirmation | Y / N / N/A |
| information provided to staff | confirmation | Y / N / N/A |
| Information provided to pupils | confirmation | Y / N / N/A |
| Itinerary | Copy of Itinerary  | Y / N / N/A |
| Emergency card/contact details (FORM 031A EmergencyCard)* Does everyone know them
* Have they been understood and rehearsed
* Who is the contact back at base
* Communication/mobile numbers
* out of hours contacts for school/parents
 | confirmation | Y / N / N/A |
| First aid information and provision (trained staff/first aid box) | confirmation | Y / N / N/A |
| First aid qualifications for staff undertaking trip | confirmation | Y / N / N/A |
| Medical forms for those attending | confirmation | Y / N / N/A |
| Residential trips (allocation of pupils/accommodation/activity) | confirmation | Y / N / N/A |
| Dietary requirements | confirmation | Y / N / N/A |
| PEEP form to be provided to venue for pupils/staff that require assistance in the event of a fire | confirmation | Y / N / N/A |
| Pupil register | confirmation | Y / N / N/A |
| Exploratory visit record of findings | confirmation | Y / N / N/A |
| Pupils Code of Conduct for School trips (FORM 031C)  | confirmation | Y / N / N/A |
| **Overseas visits** |
| Have you notified the LA at least 1 month before the visit using EVOLVE? | On the Evolve entry | Y / N / N/A |
| Have you gained LA approval at least 2 weeks before the visit using EVOLVE? | On the Evolve entry | Y / N / N/A |
| Passports. Have you checked all passports are valid? Some countries require that passports are valid for up to 6 months beyond your return date. | confirmation | Y / N / N/A |
| Visa’s | confirmation | Y / N / N/A |
| Health/medical arrangements | confirmation | Y / N / N/A |
| Exchange visits: child protection procedures | confirmation | Y / N / N/A |
| Cultural issues | confirmation | Y / N / N/A |
| **Additional preparation for schools** |
| Is a charge or voluntary contribution involved?* If so, have you made sure that this conforms to the Education Reform Act charging regulations?
* Are you using a commercial operator or company? Is there financial security e.g. ABTA/ATOL?
* If relevant, does the visit conform to Package Travel regulations?
* Have you allowed sufficient funding for staff cover for the trip?
 |
| Consider the following post-visit review arrangements:* Review risk assessment and update if necessary – involve EVC.
* Review other arrangements and evaluate whether the visit met the intended aims
* Outstanding invoices paid
* Borrowed equipment returned
* Displays
* Parents'/carers’ evening
* Report to Governors
* Thank you letters
* Article with photographs to the local media
 |

Once this checklist is complete, please ensure the required evidence and this checklist is uploaded onto the Evolve entry.