



Visit Leader Planning Checklist

Name of establishment: *St Marys Catholic Primary School ALW*

Brief description of visit:

Date(s) of visit:

Name of Visit Leader completing the checklist:

Date:

General

- The intent of the visit is clear, integral to the establishment's curriculum/programme, and focuses on the learning and development of the participants (4.3a).*
- The risks of all aspects of the visit have been considered and it is clear what leaders need to do to manage the risks (4.3c).*
- There is access to first aid appropriate to the planned activities, the group, the environment and the remoteness of visit/activity locations. (4.4g).*
- Suitable insurance is in place (4.4c).*
- There are alternative options (a 'Plan B') as necessary (4.1a).*
- There are emergency procedures for which leaders and emergency contacts have been prepared, and which are appropriate to the planned activities, the group, the environment and the remoteness of visit/activity locations (4.15. 4.1g).*
- The budget for the visit has been agreed and the Visit Leader has access to sufficient funds.*
- If this is a visit organised by a school in school time, any charges meet legal requirements (1.20).*
- External providers and facilities meet expected standards (1.4g).*
- Any contract with a provider is satisfactory and has been agreed by an authorised person in my establishment (3.2).*
- The visit meets the requirements of the employer and establishment. (3.2i)*
- Evaluation and review arrangements have been agreed (4.2, 5.1d).*

Staffing

- The Visit Leader is clearly identified and approved, and is aware of their responsibilities (3.4k).*
- All leaders and helpers are clear about their roles, can fulfil them competently, and have been approved (3.2d, 4.2a).*
- There are sufficient leaders and helpers to ensure effective supervision and deal with incidents and emergencies (4.3g).*
- If the visit involves an external provider, there is clarity about the respective roles of provider staff and establishment staff (4.4h).*
- Leaders and helpers have received all relevant information about the visit and the group, and are clear about any risks and their role in managing them.*



- If accompanying leaders are taking a family member on the visit, there are arrangements to ensure that this will not compromise group management.
- The establishment's Educational Visits Coordinator (EVC) has been kept informed during the planning process.
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Travel

- The timing of the visit is appropriate (1b).
- Transport providers have appropriate safety measures in place.
- Transport providers have appropriate insurance in place
- Contact can be maintained with drivers.

Activities

- The programme of activities is designed to achieve the visit's intent, and is appropriate to the nature of the participants.
- The risks involved in specific activities have been considered (7.1a to 7.12)
- The Visit Leadership Team includes leaders competent in the planned activities, or a suitable provider has been contracted to lead the activities.
- There is sufficient equipment available, which has been checked for suitability and safety.

Group

- Parents have been fully informed about the visit and have given their consent if this is required (4.3).
- There are clear agreements with participants/parents about any requirements such as charges. If necessary, these are aligned with the terms and conditions of any contracts with providers (3.2, 3.21).
- Up to date contact details, medical and allergy information, dietary requirements and information about special needs are available and shared appropriately with the Visit Leadership Team and any provider (4.19, 60).
- If food is provided, it meets the requirements of "Natasha's Law (60).
- Where appropriate, participants have been involved in planning, including identifying and deciding how to manage risks.
- Plans for the visit comply with current guidance about epidemics (such as coronavirus 4.4k).
- Participants have been well informed about what is expected of them, and - if it is appropriate - have agreed to a code of conduct (8.16).
- Participants are physically fit for the planned activities, and have received any necessary training.
- Participants have appropriate clothing, footwear and, if necessary, sun protection cream, sunhat and sunglasses (or these are provided as necessary).
- Participants are aware of the need to look after their own property, and adequate arrangements are in place for the security of property during the visit.
- The group will be managed and supervised appropriately (4.28).



- Safeguarding issues are addressed (1.3).
- Inclusion issues are address (3.2, 4.41).
- Medication issues are addressed (4.4d).
- Dietary issues are addressed.

Environment

- Environmental factors (e.g. weather, water levels, natural and man-made hazards) have been considered (7.21, 7.210).
- Accessibility issues are addressed (4.41).
- The visit has been planned to minimise its impact on the environment and countryside (4.4p, 7.10).
- The Visit Leader has undertaken a preliminary visit, or is already familiar with the venue and any provider, or has sufficient information from other sources (4.4g).
- Where remote supervision will be used, the environment is suitable (4.2a).
- Any accommodation is safe and suitable (4.2b).
- Security is addressed, especially for residential and overseas visits (4.2b, 7.1r).
- The risk of terrorism has been considered (4.4e).

Remoteness

- Travel/transport arrangements are appropriate (4.5a)
- Routine and emergency communication arrangements are appropriate to the location of the visit and all planned activities (e.g. if remote from a mobile signal).
- If the visit involves travel overseas, the checklist and guidance for overseas visits have been consulted (3.3q, 7.1r).

Finally

- My decision is that this visit is well prepared and should take place.
- The visit plan has been approved by the establishment's Head/Manager and by the employer if such approval is required.