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| Planning Checklist for student fieldtrips and off-site recreational trips |

This checklist can be used by members of staff responsible for organising student fieldtrips and off-site recreational trips within the UK to assist with preparation. It should be used in conjunction with the guidance on organising field trips in the United Kingdom available at <https://www.essex.ac.uk/staff/activities-health-and-safety/field-trips-and-off-site-visits>. It is primarily aimed at routine, lower risk trips within the UK.

Please use the Group Travel Planning Form for higher risk activities and overseas field trips involving groups of 5 or more individuals. A risk assessment must also be carried out for higher risk activities.

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| **Visit details:** |  | **Travel Date(s):** | |  |
| **Trip organiser:** |  | **Date Checklist completed:** | |  |
|  | |  |  | |
| **Planning checklist:** | | **Yes / No /**  **Not Applicable** | **Further comments / action** | |
| **Contact details / exchange of information** | | | | |
| Have all participants been given essential information about the trip? | |  |  | |
| Have participants been given an emergency contact number? | |  |  | |
| Have participants been asked to provide details of an emergency contact? | |  |  | |
| Have participants been asked to provide information on special requirements they may have? | |  |  | |
| Have you arranged to leave copies of emergency contact details and itinerary with a departmental contact? | |  |  | |
| **Roles and responsibilities** | | | | |
| Have roles and responsibilities of participants been defined? | |  |  | |
| **Transport** | | | | |
| Staff / student vehicles:   * Insured * Aware of department’s policy / risk assessment for driving * MOT and valid driving licence (checks required for student vehicles) | |  |  | |
| Minibus:   * Driver qualified (D1 category) to drive minibuses | |  |  | |
| Coach:   * Hired via TMP[[1]](#footnote-1), ***or*** * Has PSV operator licence and public liability to £5million * Has seat belts fitted | |  |  | |

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| **Planning checklist:** | **Yes / No /**  **Not Applicable** | **Further comments / action** |
| Public transport:   * Booked through TMP * Travel arrangements clearly communicated * Alternatives considered in event of bus/train being delayed / missed |  |  |
| **Activities / Accommodation** | | |
| Informed place to be visited (required for large groups) |  |  |
| Checked safety standards, including: fire evacuation, first aid and emergency arrangements. For accommodation also security, safety of structure and facilities and surrounding environment. (Not AirBnB) |  |  |
| Informed host of group members with special requirements and checked access arrangements |  |  |
| Checked safety requirements / precautions to be followed |  |  |
| **Supervision / lone working** | | |
| Ground rules (contacts / reporting back) established for situations where supervision will be indirect. |  |  |
| Emergencies |  |  |
| First aid arrangements |  |  |
| Group advised on what to do in event of a serious incident at the location. |  |  |
| Emergency Incident Procedures / Participants form completed[[2]](#footnote-2). (NB: Leave copy with your Dept. contact and the Colchester Campus Information Centre prior to your departure). |  |  |
| **Behaviour** | | |
| Ground rules / code of conduct communicated |  |  |
| Activities for personal time |  |  |
| **Other considerations** | | |
| Arrangements for under 18s |  |  |
| Additional needs of participants due to   * Disabilities * Medical conditions * Cultural / ethnic needs |  |  |
| **Higher risk situations** | | |
| Risk assessments / safety precautions for:   * Hazardous work/research activities (e.g. Interviewing public) * Adventurous activities[[3]](#footnote-3) * Competence / insurance checks on supplier of adventurous activities carried out? * [Travel insurance application](https://sp.essex.ac.uk/sections/finance/Lists/Travel%20Insurance%20Application%20Form/allitems.aspx) completed for “Adventurous Activities”. |  |  |
| **Environmental considerations** |  |  |
| Arrangements for checking weather / environmental conditions during trip in place. |  |  |
| Coastal trips: coastguard contacted for advice on weather, tide, risk areas |  |  |
| Participants advised of suitable precautions / clothing |  |  |
| Alternative arrangements in place for if conditions are not suitable for planned activity. |  |  |
| **Occupational Health Considerations (Staff only)** |  |  |
| Have any of the trip participants answered Yes to any of the following questions[[4]](#footnote-4)?   * Do you have any underlying physical or mental health problems or disabilities that affect your fitness to travel? * Are you having, or waiting for any treatment or investigations for any condition that would affect your ability to travel? * Have you ever required or do you require any adjustments for travel based on an underlying medical condition? * Do you have any medical problem, or disability which you would like to discuss with Occupational Health? |  |  |
| If staff answer Yes to any of the above occupational health questions they will be required to complete a confidential health questionnaire prior to UK travel that will be sent to them directly. This needs to be requested directly from [ohquery@essex.ac.uk](mailto:ohquery@essex.ac.uk) | | |

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| **Action Plan** | | | |
| **Action needed** | **By who** | **By when (date)** | **Done √** |
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1. University’s approved travel management provider. See: <https://www.essex.ac.uk/staff/travel-and-transport/booking-business-travel> [↑](#footnote-ref-1)
2. Available at: <https://www.essex.ac.uk/staff/activities-health-and-safety/field-trips-and-off-site-visits> [↑](#footnote-ref-2)
3. Examples of adventurous activities include diving, water / air based, trekking in remote areas, caving. (Note University travel insurance only covers adventurous activities which are delivered as part of a work, research or learning activity. Recreational activities are not covered). [↑](#footnote-ref-3)
4. Participants should be given opportunity to declare the information confidentially. [↑](#footnote-ref-4)