



National
Guidance
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Checklist - Visit Leader

This list is designed to be a prompt for visit planning, and a final check. The relevance of each point, and the complexity of the responses, depends on the nature of the visit. Information about good practice can be found elsewhere in OEAP National Guidance (the numbers in brackets refer to some relevant documents).

For overseas visits, this checklist should be used in conjunction with OEAP National Guidance document [3.3g "Checklist – Visit Leader of an Overseas Visit"](#)

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 group and environment ([4.4b](#)).
- 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 ([4.1c](#), [4.1g](#)).
- I have access to sufficient funds and an effective means of communication in case of emergency.
- External providers and facilities meet expected standards ([4.4g](#)).
- Any contract with a provider is satisfactory and has been agreed by an authorised person in my establishment ([3.2i](#)).
- The visit meets the requirements of my employer and establishment.
- Evaluation and review arrangements have been agreed ([4.2c](#), [5.1d](#)).

Staffing

- I am clearly identified and approved as the Visit Leader and am aware of my 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 ([4.3b](#)).
- 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.
- I have kept my Educational Visits Coordinator (EVC) informed during the planning process.

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 ([7a to 7z](#)).
- 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 suitable equipment available.
- Travel/transport arrangements are appropriate ([4.5a](#)).

Group

- Parents have been fully informed about the visit, and have given their consent if this is required ([4.3d](#)).
- Any contracts with participants/parents, including any charges, meet my establishment's requirements ([3.2c](#), [3.2i](#)).
- 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 ([4.4j](#), [6o](#)).
- If food is provided, it meets the requirements of 'Natasha's Law' ([6o](#)).
- 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.
- Safeguarding issues are addressed ([4.3e](#)).
- Inclusion issues are addressed ([3.2e](#), [4.4i](#)).

- Medication issues are addressed ([4.4d](#)).
- Dietary issues are addressed.

Environment

- Environmental factors (e.g. weather, daylight hours, water levels, natural and man-made hazards) have been considered ([7i](#), [7j](#)).
- Accessibility issues are addressed ([4.4i](#)).
- I have undertaken a preliminary visit, or am already familiar with the venue and any provider, or have 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](#)).
- If the visit involves travel overseas, I have consulted the checklist and guidance for overseas visits ([3.3g](#), [7r](#)).
- Security is addressed, especially for residential and overseas visits ([4.2b](#), [7r](#)).
- The risk of terrorism has been considered ([4.4e](#)).

Finally

- My decision is that this visit is well prepared and should take place.
- The visit plan has been approved by my establishment/employer if required.

