



PRE-TRIP PLANNING CHECKLIST & TIMELINE

Dates of Trip: _____

ASAP

- Have the principal/school district official sign and return the **Outdoor Education General Agreement/Contract**, and submit a non-refundable deposit to officially reserve your date.
- Have the principal or a district official sign the **YMCA Point Bonita User Agreement**.
- Submit request for **Certificate of Insurance** to your school district.
- Clarify district policies regarding field trips, including the screening of chaperones and drivers.
- Begin **fundraising** plan, if applicable.
- Apply for **Financial Assistance**, if applicable.
- Begin recruiting chaperones.

2 MONTHS BEFORE TRIP

DUE: _____

- Copy and distribute Point Bonita's **Student & Family Handbook**. Review all the documents in the handbook with your students and have them return signed forms at least one month prior to your visit.
- Copy and distribute **Chaperone Manuals**. Meet with chaperones to review the Manual and discuss expectations and responsibilities.
- Confirm bus reservations or begin arranging parent drivers, if applicable.

1 MONTH BEFORE TRIP

DUE: _____

- Arrange for the payment of the balance of the **Contract** (due two weeks prior to arrival).
- Submit the **Certificate of Insurance** to the YMCA.
- Submit a Pre-Trip Questionnaire to the YMCA:**
<https://www.surveymonkey.com/r/PBY-OE-Pre-trip-questionnaire>
 - Use **Health History Forms** and your own knowledge of your students to input special needs/health concerns/dietary modifications into Naturalist Trail Group List and Pre-trip.
 - Please estimate 20-50 minutes to complete questionnaire- you may save and go back to it.
 - Include ALL students and adults (including teachers) in your final numbers.
- Collect the completed **Release and Waiver of Liability and Indemnity Agreements** and **Health History Forms** from students and chaperones. Then:
 - Check for signatures on both forms and add pertinent dietary and health history information to Naturalist Trail Group Lists.
 - Add **emergency contact name(s) and numbers for all participants** on the Naturalist Trail Group List.
 - Mail the originals of both the Release of Liability and the Health History Form for each student to the YMCA.
- Distribute any permission slips that your school requires.

3 WEEKS BEFORE TRIP

DUE: _____

- Fill out the **Naturalist Trail Groups List** sent to you after submitting your Pre-Trip
- Fill out the **Room Assignment Sheets**. Remember to include teachers.
- Assign chaperones to recreation time duties by filling out the **Recreation Time Assignment Sheet**
- Email or fax in your **Merchandise Order Form (with all orders tallied on one form)**, if applicable.
- For 3-5 day programs, prepare a Student Journal, if desired. A sample journal is available on our website.

DAY OF DEPARTURE TO POINT BONITA YMCA

- Bring all other necessary forms (student emergency contact info, **Medication Log**, etc.)
- Remind students to pack their hiking essentials—including a lunch—in their daypacks instead of luggage.
- Post the **Point Bonita YMCA Contact Sheet** (last page of the Teacher Manual) at the school.
- Collect student medications with their names clearly written on each.
- Call the Point Bonita YMCA Outdoor Education office upon departure from school to confirm your estimated arrival time: **(415)-331-9622 ext. 5952**.

Point Bonita YMCA Contact Information:

Point Bonita YMCA
981 Fort Barry
Sausalito, CA 94965

(415) 331-9622
Fax: (415) 331-2567

For sending in forms via email:

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ext.4484