

# I A SAMPLE PLANNING CHECKLIST

## **Project aim**

Main aim  
Supporting objectives  
Overall time frame  
Size of team  
Realistic budget/cost per person  
The end products

## **Researching the opportunities**

Library and website research  
RGS–IBG Map Room and Expeditions Database  
Past expedition reports and journals  
Maps and guidebooks  
Key references – bibliography  
Ideas from past projects  
University contacts (international)

## **Science programme**

Pure research or applied  
Methodology  
Sampling framework  
Linking the disciplines (earth, life and social sciences)  
Surveying/monitoring  
GI science and mapping  
Habitat surveys  
People-oriented research

Specialist equipment  
Laboratory requirements  
Training opportunities for young scientists  
Publishing plan

## **Contact with your hosts**

Embassy of High Commission in UK  
UK diplomatic missions  
Government departments  
British Council offices  
Local non-governmental organisations (NGOs)  
Museum or herbarium  
Research institutes  
Local field centres  
Protected areas (national park offices)  
University and other networks  
Links through schools

## **UK administration**

Establishing a planning office  
Communications  
Reliable email facility  
Website  
Meeting rooms  
Filing cabinets/storage  
Documentation:

## APPENDIX I: A SAMPLE PLANNING CHECKLIST

- passports with visas
- immunisation certificates
- permission and political clearance
- insurance documents
- international driving licences
- permits: collecting and climbing
- letters of support from host bodies
- customs clearance
- maps and aerial photographs
- bibliography

**Team building**

- UK and host country members
- Roles within the team
- Choice of key disciplines/skills
- Inclusive approach
- Applications and selection
- Early planning meetings
- Joining guidelines
- Costs and joining fee
- Training plans for all
- Delegation of responsibilities
- Personal details
- Medical checks
- Next of kin
- Communication:
  - newsletters
  - meetings

**Field logistics**

- Accommodation
- Transport
- Catering
- Equipment and stores (see below)
- Fuel requirements
- Water supplies
- Communication
- Navigation
- Reconnaissance visit (see Appendix 2)

**Budget and finance**

- Budget (initial drafts)
- Appointing a treasurer
- Open bank account
- Managing the finances
- Loan facilities
- Bank branch or corresponding bank in host country
- Travellers' cheques
- Credit cards
- Bank transfers
- Letter of credit
- Auditing the accounts

**Fund-raising**

- Target sum
- From your own organisation/university
- Trusts and other grant-giving organisations
- Appeal to commerce
- Sponsorship opportunities
- Fund-raising events
- Working to raise funds

**Public relations**

- Project brand
- Key message to public
- Image and branding
- Project logo/crest
- Brochure
- Launch plans
- Press release/conference
- Media coverage

**Travel**

- Air*
- Budget flights, concessionary fares
- Advance booking
- Excess baggage
- Deadline for payment

## EXPEDITION HANDBOOK

Air freight  
Implications of stop-overs

**Land**

Mode of transport  
Own versus public  
Vehicle preparation  
Spare parts/accessories  
Route maps  
International carnets de passage (with bank guarantee)  
Insurance cover for all drivers  
Mechanic, maintenance training  
Advance ferry bookings

**Stores and equipment**

Acquisition  
Procurement  
Storage  
Testing  
Qualities  
Packing, containers  
Value and insurance  
Spares available in host country  
Purchase in host country  
Equipment lists:

- secretariat
- packing containers
- scientific
- surveying/mapping/GIS
- navigation
- communication
- general base equipment
- field and camp equipment
- catering/kitchen
- rations
- replenishable stores
- workshop stores
- laboratory stores/chemicals
- medical
- specialist – mountaineering, diving, caving, kayaking, etc.

- personal
- transport
- photographic and film
- documents

**Packing**

Immediate storage  
Packing/box sizes  
Packing requirements in the field  
Full contents list  
Labelling/weighing  
Value for consignment for insurance and freight  
Final list for customs – export/import

**Freight**

Shipping dates  
Available ships  
Passage payment  
Discounts, deposits  
Guesstimate of freight – weight/bulk?  
Container size  
Documentation  
Bills of lading  
Customs clearance  
Insurance during passage  
Agents in the UK and in-country  
Delivery to docks  
Duplicate lists

**Insurance**

Medical and life insurance  
Casualty/evacuation  
Life  
Personal injury  
Third party indemnity  
Equipment and transport  
Cancellation of project  
Personal belongings  
Cash  
Specimens

## APPENDIX I: A SAMPLE PLANNING CHECKLIST

**Health and safety**

Recommended guidelines  
 Legal requirements  
 Risk assessment  
 Qualification and experience of team  
 Training needs  
 Standard operating procedures  
 Code of conduct  
 Next of kind details

**Medical**

Medical risk assessment  
 Medical officer  
 First-aid training  
 First aid and medical kits  
 In-country support  
 Casualty evacuation plans  
 Communication with insurance  
 company  
 Medical questionnaire for members

**Recording the project**

Film or video  
 Still photographs  
 Copyright agreement  
 Tape recordings  
 Artist in residence  
 Daily log and diaries  
 Project recorder for the project  
 Central data (e.g. met. readings)

**Sharing the results**

The report (see below)  
 Project website  
 Scientific papers  
 Educational publications  
 Popular press/magazines  
 Tape recordings – CD/tape  
 Television/radio  
 Public lectures  
 Photographic exhibitions  
 Posters  
 Making electronic images available

**Post-project administration**

Settle bills and close the bank account  
 Cataloguing the photographs  
 Sponsor's reception  
 Lecture programme  
 Thank-you letters  
 Report to host country and sponsors  
 Insurance claims  
 Lecture programme  
 Maintaining links in host country

**Final reports**

Appointment of editor(s)  
 Author(s)  
 Length, binding and format  
 Photographs  
 Maps/drawings  
 Number, print run  
 Cost  
 Distribution list  
 Despatch/postage