



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 and 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.
- Collect the completed **Release and Waiver of Liability and Indemnity Agreements** and the **Health History Forms** from students and chaperones, then:
 - Check for signatures on both forms.
 - **Make a copy** of each completed **Health History Form** (*you will divide this set of copies into naturalist trail groups prior to your arrival at Point Bonita*).
 - **Mail the originals** of each student's **Release of Liability** and **Health History Form** to the YMCA.
- **Submit a Pre-Trip Questionnaire to the YMCA:**
<https://www.surveymonkey.com/r/PBYResOEPretripQuestionnaire>.
 - There is a document labeled '**Pre-Trip Questionnaire: What You Need to Know**' on our website that details all the information you will need to gather in order to complete the questionnaire.
 - Use **Health History Forms** and your own knowledge of your students to input special needs/health concerns/dietary modifications.
 - Include ALL students and adults (including teachers) in your final numbers.
- Distribute any permission slips that your school requires.

2 WEEKS BEFORE TRIP

DUE: _____

- Fill out the **Naturalist Trail Groups List** and **email** or fax to Point Bonita.
 - **Divide the copies you made of the Health History forms** (*see above*) into each naturalist trail group.
- Assign chaperones to recreation time duties by filling out the **Recreation Time Assignment Sheet**.
- Fill out the **Room Assignment Sheets**. Remember to include rooms for teachers.
- 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**. The journal is available on our website.

DAY OF DEPARTURE TO POINT BONITA YMCA

- Bring the copies of the **Health History Forms (divided into naturalist trail groups)** to give to Point Bonita staff upon arrival.
- Bring all other necessary forms, e.g. 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** 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**.

SUMMARY OF PLANNING PAPERWORK

Outdoor Education General Agreement/Contract: This form outlines your program fees, deposit amount due, balance due and other important terms, including our cancellation policy and guaranteed minimums. If you have not already, please have an administrator sign and return it as soon as possible to hold your trip dates.

YMCA Point Bonita User Agreement: This legally binding agreement confirms your understanding of the use permit your group is being given while at Point Bonita YMCA and confirms your release of liability while using the facility. Please have an administrator sign and return it as soon as possible to hold your trip dates.

Certificate of Insurance: Follow the directions carefully in this step-by-step process to obtain the Certificate of Insurance. Groups will not be allowed at Point Bonita YMCA until our business office has received proof of insurance. This process can take some time so please put in a request for insurance as soon as possible.

Teacher Manual: Please carefully review the revised Teacher Manual, even if you have planned a trip in previous years. This will guide you through every step of your planning process and contains many useful tips.

Student & Family Handbook: It is vital that a copy of this handbook be sent home with every student attending Point Bonita. This handbook gives parents/guardians a lot of the basic information about our program, a packing list, and contains the forms that must be completed for each student. The completed Health History and Release of Liability forms for each student should be returned to Point Bonita one month prior to your visit.

Chaperone Manuals: Please copy and distribute this manual to all attending chaperones, as it contains pertinent information and expectations regarding their role. Every chaperone should also complete and turn in a Health History and Release of Liability form (in manual).

Health History Form & Release of Liability Form: Both forms are required for every student and adult that will be attending Point Bonita. They can be found in the teacher and chaperone manuals as well as the student & family handbook. Please check to see if your school or district requires their own permission forms to be completed as well. Collect both forms and check them for accuracy, clarity, and completeness. Both forms must be signed, and the Release of Liability must be completed without alterations. Please look through each Health History Form and use them to input health concerns, special needs and dietary restrictions into the Pre-Trip Questionnaire.

Pre-Trip Questionnaire: Please complete this questionnaire one month before your arrival- your input of accurate information and requests are essential to our planning of curriculum, staffing and meals. You will need to collect student Health History forms to complete it. There is a helpful [document](#) available on our website under 'Pre-Trip Planning Resources' that lists all the information you will want to gather in order to complete the questionnaire. **SurveyMonkey does allow you to save & come back to the form, but you must do so on the same computer.**

Naturalist Trail Groups List (pages 26-27 of teacher manual): Once you submit the Pre-Trip Questionnaire, we will confirm the number of naturalist trail groups assigned to your school so that you can complete this form. Please [email](#) or fax this form to Point Bonita two weeks before your arrival.

Room Assignment Sheets (pages 30-32 of teacher manual): Once you submit the Pre-Trip Questionnaire, we will confirm the dorm rooms assigned to your school. Use the campus map on page 38 of the teacher manual to organize participants, including teachers, into their rooms.

Medication Log (page 33 of teacher manual): This form is for the school's designated trip Health Supervisor to log all regular medications distributed during the trip to ensure appropriate and timely medication management. Prior to the trip, any students receiving regular medication should be listed on this form. This is solely for your school's use.

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:

Rochelle Tolbert, Reservations Coordinator

rtolbert@ymcasf.org

ext.4484