1 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:
- 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 loading  
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 1: 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