

Chapter 13 – Checklists – What do I need in place before I begin delivery?

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This chapter is a list of things you should consider having in place before you begin delivery. Much of this is discussed as part of your Forest School leader training and may be present in other chapters within the book. Items prefixed with an asterisk (*) should be considered as essential; if they are not prefixed, they may still be important or desirable. Different groups require different equipment, so you will need to adapt your equipment list for each group. We begin with the business planning and management aspects of your Forest School.

Business planning

The business planning aspect of Forest School is critical for the success of your business. Further information on this can be found in **Chapter 6**.

| Area | Items | CHECK |
|--|--|-------|
| *Business plan or business case | | |
| | Financial forecast | |
| | Stakeholder analysis | |
| | Business structure | |
| *Company/business registration | | |
| | *Registration with Companies House (if applicable) | |
| | *Registration with HRMC | |

Business management

The business management aspects should be considered as part of the day-to-day running of your business. More information on this can be found in **Chapter 7**.

| Area | Items | CHECK |
|---|--|-------|
| *Operations management | | |
| | *Capacity plan | |
| *Financial management | | |
| | *Accounts | |
| | *Cash flow forecast | |
| | *Income and expenditure record | |
| | *Invoicing system | |
| | *Advice on taxation | |
| *Human resource management process and procedure | | |
| | *Completed personal information forms for any staff/volunteers | |
| | *Forest School Leader Training | |
| | *First Aid | |
| | *First Aid supplies | |
| | Pension information (if applicable) | |
| | Payment information | |
| | *DBS or alternative checks | |
| | Holiday procedure | |
| | Sickness | |
| | *Reporting procedure | |

| Area | Items | CHECK |
|------------------------------|---------------------------------------|-------|
| | *Complaints/grievances | |
| | Petty cash procedure | |
| | Rotas | |
| | Expectations and behaviour | |
| *Knowledge management | | |
| | *Policies and procedures for business | |
| | *Booking procedure and policy | |
| | *Complaints procedure | |
| | *Reporting procedure | |
| | *Evaluation procedure | |
| | | |
| *Marketing management | | |
| | *Market research | |
| | *Marketing strategy – general | |
| | *Marketing – targeted/segmented | |

Paperwork

Chapter 12 has told us about the value of paperwork; if your paperwork is in order you will feel much more confident to deal with issues arising in your sessions.

| Area | Items | CHECK |
|---|---|-------|
| *Land use agreement, lease or licence (Chapter 10) | | |
| | *Permissions | |
| | *Access rights | |
| | *Emergency protocol | |
| | *Risk management | |
| | *Site management | |
| | *Site based insurance | |
| Site specific risk assessment | | |
| *Safety and risk assessment | | |
| | *Activity risk-benefit analysis | |
| | *Pro forma for daily site checks | |
| | *Arrangements for any tree inspections | |
| | *Emergency procedures | |
| | *Accident and Incident forms and reporting procedures | |
| | *Near-miss form and protocol | |

| Area | Items | CHECK |
|--|---|-------|
| *Permissions and consent | | |
| | Permission form for each participant | |
| | Data gathered (medical needs, emergency contact, additional needs etc) | |
| | GDPR awareness & compliance | |
| *Safeguarding | | |
| | Safeguarding policy and procedures | |
| | Disclosure form and reporting system | |
| | Current Enhanced DBS for all staff | |
| *Forest School handbook | | |
| | With all necessary policies and procedures – this is created as part of your Forest School training | |
| Session planning and evaluation | | |
| | *Session plans | |
| | *Session evaluations and reflections | |

| Area | Items | CHECK |
|------------------------------|---|-------|
| Session planning - continued | *Participant observations | |
| | *Leader observations | |
| | Possibly methods of measuring participant development | |
| *Insurance | | |
| | Public liability insurance appropriate to your site, group and activities | |
| | Employers' liability insurance | |
| *Evacuation plan | | |
| | Responsibility check cards (Chapter 12) | |
| | | |
| *Health and safety notices | | |
| | Health and safety at work poster | |
| | Warning signs | |
| | Hazard tape | |
| | Laminated natural hazard ID sheets | |

Communication

Communication is the key to successful relationships. If things break down, check your communication. Review it regularly and fix or change language to remain current and in line with your marketing and sales strategies.

| Area | Items | CHECK |
|--|---|-------|
| *Communication strategy (Chapters 6 and 12) | | |
| | *Outlining all stakeholders and how you will communicate with them | |
| *Induction for staff/helpers (Chapter 5) | | |
| | Training session with staff/helpers to ensure awareness of their roles and responsibilities | |
| | Formal Level 2 Forest School Assistant training for staff/helpers | |
| | Outline of expectations, roles and responsibilities | |
| | Systems for sharing reflections/observations after each session | |
| | Any other supporting documents for staff/helpers | |
| | Ongoing communication systems | |

| Area | Items | CHECK |
|---|--|-------|
| *Communicating with managers (Chapters 8 and 9) | | |
| | Establishing scope of programme | |
| | Understanding resources and logistics | |
| | Agreeing any ongoing reporting or evaluation | |
| *Communicating with parents/carers (Chapters 8, 9, and 11) | | |
| | Providing opportunities to understand Forest School | |
| | Gaining required consents | |
| | Providing ongoing communications throughout programme | |
| | | |
| *Communicating with landowner (Chapters 8, 9, and 10) | | |
| | Providing opportunities to understand Forest School | |
| | Gaining required permissions | |
| | Exchanging various documentation – e.g. insurance, risk assessments, etc | |
| | Providing ongoing communications throughout programme | |

Additional training and CPD

Training is critical for the continued success of your delivery. It prevents you from becoming stagnant, and increases your internal tool box and the opportunities you can offer to your participants. Consider setting aside a yearly CPD budget in your financial forecasts and planning. Conferences are often great value for money, giving you a mix of small CPD opportunities for a one-off cost.

| Area | Items | CHECK |
|--|--|-------|
| *First Aid training (see Chapter 5) | | |
| | *Outdoor first aid course – minimum 16 hours; with paediatric if working with children | |
| *Safeguarding training | | |
| | *For all adults working with children or vulnerable adults | |
| Food hygiene | | |
| | Level 2 Food Hygiene and Safety for Catering – advisable if regularly cooking and/or handling food during sessions | |
| *Tree inspection | | |
| | *Short courses can provide insight to some key visual indicators of damage and defects in trees | |
| | *Link with a qualified arboriculturist | |

| Area | Items | CHECK |
|------------------------------------|--|-------|
| Working with challenging behaviour | | |
| | If working with learners with particular needs it is advisable to gain training or support | |
| *CPD plan | | |
| | See Chapter 14 for further skills and knowledge you may want to explore | |
| | Pick what areas of professional development you would like to focus on: in the next 12 months; in the next 3 years | |
| | List potential books, courses and online materials which may support this | |

Kit and equipment

Your kit and equipment are a significant outlay for your Forest School. Do not be tempted to buy it all in one go, unless you have been given a grant to do so. Timing your purchases will help with your cash flow. Consider only buying tools you either have the skills to use and maintain or have the time to practice and master.

This is not an exhaustive list and your group may require specific equipment to reach the opportunities on offer. It is always worth remembering that knowledge weighs nothing, but kit weighs plenty. The most important piece of kit, other than your site, is *you*. With your imagination and enthusiasm, learners will thrive. Every Forest School session is different and each group of learners is unique, so a universal kit list is impossible. However, there is a useful reflection that will help you decide on what to kit out your classroom with. Before you spend your hard-earned cash, you can use the following reflective process to check if you really need that new piece of kit.

Do I need it because of a Health and Safety requirement?

This question will help you to create a **must-have list** to keep learners safe. You should include: shelter (from the weather); fire (the ability to make/provide a hot drink/food or warm a person); clothing (extra kit to keep unprepared learners warm/dry); First Aid; PPE; paperwork (including evacuation equipment and procedures); hygiene (water, tippy taps, soap, etc); mobile phone; walkie-talkies.

Do I need it to promote learning opportunities?

This question could help create an ever-changing list, dependent on the learners' needs. Some basic provisions will facilitate a lot of learning, e.g. rope, string, natural resources, tools, pots and pans, water, field guide sheets, magnifiers, tubes, etc. It is also helpful to think about: how often the object will be used; whether you can maintain it; whether you can transport or carry it to site; whether it needs specialist skills or training to use; and whether you have the right skills or knowledge to use it. Consider also: will it prevent a learning opportunity?

Do I need it to create a comfortable or usable space for learners?

This list will be dependent on your site or setting and may include toileting and privacy, seating, and hammocks or nets. It may also cover how equipment is transported or stored. Often items on this list will also appear in the other two lists – a comfortable kneeling mat may appear in Health and Safety in response to a risk assessment, for example.

If the answer to all three is *No*, do you really *need* the extra kit to carry and maintain?

| Area | Items | CHECK |
|---------------------|--|-------|
| *Safety kit | | |
| | *Emergency rucksack with First Aid kit and any other necessary emergency kit | |
| | *Means of communication – e.g. phone or radio | |
| | *Fire safety – fire blanket, plunge bucket, heat proof gloves | |
| | *Emergency plan | |
| | *Medical information | |
| *Welfare kit | | |
| | Means of accessing drinking water – jerry cans etc | |
| | Handwashing facilities – e.g. tippy tap, bucket and soap etc | |
| | Toileting facilities – e.g. loo roll, trowel, sawdust (if compost loo) | |

| Area | Items | CHECK |
|--|--|-------|
| | Appropriate outdoor clothing for all (learners and helpers) | |
| | Spare clothing to borrow | |
| *Site based resources and 'loose parts' | | |
| | Seating – logs, benches, etc | |
| | *Appropriate access paths all year round – e.g. chipping in wet weather, bridges over streams, etc | |
| | *Fire area – clear of trip hazards and overhanging branches; with log surround | |
| | Resources for tool work – e.g. A frames, saw horses, benches, blocks, clamping jigs, etc | |
| | *A range of loose natural materials – e.g. poles and sticks of different lengths, logs, leaves, cones, seeds | |
| | A water source for play | |
| Construction and physical play kit | | |
| | Ropes (if making swings/bridges ensure correct breaking strain) | |
| | Tarps | |
| | Paracord | |
| | Hammocks | |
| | Slackline | |
| | Pulley blocks | |
| | Buckets | |

| Area | Items | CHECK |
|--|---|-------|
| | Pallets (can be a useful free source of timber for projects) | |
| Tools – appropriate to size, strength and ability of user | | |
| | Carving – fixed blade knives, chisels, gouges, crook knives | |
| | Striking – mallets, hammers | |
| | Sawing – bow saws, folding pruning saws, hacksaws, Japanese handsaws, etc | |
| | Hole making – hand drill, bit and brace, eyed auger, gimlets, palm drill | |
| | Brashing – loppers, secateurs, billhook | |
| | Splitting – froe, axe, splitter | |
| | Digging – trowel, spade, digging stick | |
| Fire and campfire cooking kit (chapter 8) | | |
| | Watering can | |
| | Fire-lighting box – with range of tinder and methods of lighting | |
| | Tripod or pothanger | |
| | Kettle | |
| | Billy can(s) | |
| | Grill | |
| | Tin foil | |
| | Skillet or pan | |

| Area | Items | CHECK |
|------------------------------------|--|-------|
| | Storm kettle | |
| | Dutch oven | |
| Crafting kit | | |
| | String and/or wool | |
| | Scissors | |
| | Clay (or dig it out of the ground) | |
| | Mark-making kit – chalk, crayons, paints (non-toxic), brushes | |
| | Baskets | |
| Discovery kit | | |
| | Magnifier pots and/or lens | |
| | Binoculars | |
| | Mirrors | |
| | Blindfolds | |
| Leaders' and helpers' kit | | |
| | Camera | |
| | Notebooks and pencils | |
| | PPE – e.g. safety boots, hard hat, work gloves, etc | |
| Kit maintenance and storage | | |
| | Safe and secure storage unit for kit and equipment | |
| | Robust and waterproof kit bags – especially for tools and ropes | |
| | Tool cleaning – oil, rags, brushes | |
| | Tool sharpening – waterstones | |
| | Washing lines and drying space – for drying tarps and/or waterproofs | |
| | Washing up facilities for cooking kit | |