

SOP Template: Pre-trip Planning and Approval Procedures

This SOP details the **pre-trip planning and approval procedures**, covering steps such as trip objective definition, route and itinerary planning, risk assessment, resource allocation, and obtaining necessary approvals from relevant authorities. The aim is to ensure all trips are thoroughly prepared, authorized, and compliant with organizational policies to enhance safety, efficiency, and accountability before departure.

1. Purpose

To establish a standardized process for planning and approving trips, ensuring thorough preparation, risk mitigation, and compliance with organizational requirements.

2. Scope

This SOP applies to all staff and contractors undertaking official trips on behalf of the organization.

3. Responsibilities

Role	Responsibility
Trip Planner / Requestor	Initiate trip planning, complete documentation, and obtain initial approvals.
Supervisor/Line Manager	Review proposed trip objectives, approve resource allocation, and recommend for authorization.
Risk & Compliance Officer	Evaluate risk assessments and recommend mitigation measures.
Authorizing Authority	Grant final approval for the trip after all requirements are met.

4. Procedures

- 1. Define Trip Objectives**
 - Clearly state the purpose and expected outcomes of the trip.
 - Ensure objectives align with organizational goals.
- 2. Plan Route and Itinerary**
 - Develop a detailed itinerary specifying destinations, dates, times, and accommodation arrangements.
 - Identify and plan routes, including potential alternatives.
- 3. Conduct Risk Assessment**
 - Identify potential risks (e.g., security, health, environmental).
 - Document mitigation actions and emergency contacts.
 - Review applicable travel advisories and restrictions.
- 4. Allocate Resources**
 - Identify and allocate necessary resources (transport, lodging, budget, equipment).
 - Ensure readiness of all resources prior to departure.
- 5. Prepare Documentation**
 - Complete trip request forms with all required details.
 - Attach itineraries, risk assessments, and resource plans.
- 6. Obtain Approvals**
 - Submit documentation for supervisor review and endorsement.
 - Forward to risk/compliance for assessment/clearance (if required).
 - Seek final authorization from designated authority.
- 7. Notify Stakeholders**
 - Inform relevant stakeholders of approved trip details and emergency contacts.
- 8. Record Keeping**
 - Retain all trip documentation and approvals for audit and compliance.

5. Related Documents

- Trip Request Form
- Risk Assessment Template

- Travel Policy

6. Revision History

Version	Date	Description	Author
1.0	2024-06-13	Initial release	[Author Name]