

SOP Template: Pre-trip Planning and Objective Setting

This SOP details the process of **pre-trip planning and objective setting**, focusing on the importance of thorough preparation before any travel or field activity. It includes defining clear objectives, assessing risks, gathering necessary resources, coordinating logistics, and ensuring compliance with safety and operational standards. The aim is to enhance efficiency, safety, and goal alignment for successful trip execution.

1. Purpose

To ensure all trips are planned effectively, aligning the purpose, objectives, logistics, resources, and safety/compliance requirements for optimal outcomes and risk mitigation.

2. Scope

This SOP applies to all staff and participants involved in travel or field activities that require planning, approval, and coordination within the organization.

3. Procedure

1. Define Trip Objectives

- Consult with relevant stakeholders to identify trip goals and expected outcomes.
- Document specific, measurable, achievable, relevant, and time-bound (SMART) objectives.

2. Risk Assessment

- Identify potential hazards (health, safety, environmental, political, etc.).
- Document risk mitigation strategies and required safety equipment or measures.

3. Resource Gathering

- List required materials, equipment, and documentation (passports, permits, insurance, etc.).
- Assign responsibilities for resource procurement.

4. Logistics Coordination

- Arrange for transportation, accommodation, and local support as necessary.
- Plan itinerary and contingency measures for unforeseen circumstances.

5. Compliance and Approvals

- Verify adherence to organization policies, legal requirements, and safety standards.
- Obtain necessary approvals from management and document all clearances.

6. Pre-trip Briefing

- Conduct briefing for all participants to review objectives, roles, emergency procedures, and contact information.

4. Documentation

- Trip planning checklist
- Risk assessment forms
- Resource and equipment lists
- Approval and compliance records
- Pre-trip briefing notes

5. Review and Continuous Improvement

After the trip, conduct a debrief to evaluate the planning process, outcomes, and any incidents or lessons learned. Update procedures as needed to improve future planning and execution.

Note: All travel and trip activities must comply with the organization's safety and operational policies, as well as relevant legal and regulatory requirements.