



## TASKS FOR TRANSITIONING A COUNTRY OFFICE ARCHIS: OPERATIONS

*Includes Facilities, Equipment, Supplies, Insurance, Procurement, Travel, Visitors, Vehicles and Consultants*

### FACILITIES

- ❖ **Adapt GOM 5 - Facilities**
- ❖ **Write SOPs and adapt all forms**
- ❖ **Assess office size needed if moving from current space rented by I-TECH**

#### If moving:

- Conduct walk through with landlord and arrange for any space repairs needed before ending current lease
- Identify, assess, and select new office space
- Review lease with in-country lawyer before signing
- Sign lease**
- Set up utilities and garbage disposal and close out those in I-TECH's name
- Determine phone needs and establish service agreements and close out any in I-TECH's name**
- Determine internet service needs and establish service agreements and close out any in I-TECH's name**
- Develop office safety and evacuation procedures and orient staff
- Survey market for furniture (if needed) and supply vendors
- Arrange for office furniture to be moved (if being done)
- Hire guards or establish agreement with guard service and close out any in I-TECH's name

#### If not moving:

- Conduct walk through with landlord and identify any repairs needed before space is turned over to LE**
- Work with I-TECH HQ and REO to roll over current lease into LE's name**
- Work with I-TECH HQ and REO to obtain I-TECH/UW deposit from landlord
- Make sure deposit is in any sub-agreement put in place with I-TECH
- Pay final bills in I-TECH's name and do a name change for utilities and other services (guard, IT, etc.) currently in I-TECH's name**

### EQUIPMENT (with a purchase price of \$5,000 or more)

- ❖ **Adapt GOM 18 - Equipment**
- ❖ **Write SOPs and adapt all forms**
- ❖ **Put an equipment inventory system in place**

#### Prior to closing I-TECH:

- Review/update equipment inventory list against UW's to verify current equipment assets
- Make list of equipment to be sold/donated/turned over before becoming LE (includes vehicles, large servers, copy machines, medical equipment, etc.)
- Determine country laws, or partner expectations for turning over equipment
- Obtain funder prior approval for equipment with a current market value of \$5,000 or more, being sold/donated/turned over**
- Complete handover letters for equipment donations**
- Determine who will transport items to recipients, if needed
- Cancel any services associated with equipment being sold or donated including GPS tags, fuel cards, insurance
- Re-deposit proceeds from any sales of equipment to grant
- Remove equipment from UW inventory once handover/sale is finalized
- Return any leased equipment and close agreement in I-TECH's name. Open agreement in LE's name if needed**
- Work with HQ to create handover of all equipment to be turned over to LE once legal.

#### Upon opening LE:

- Replace all UW inventory tags with LE's tags
- Update inventory sheet to remove all UW tag numbers and replace with LE's

### **SUPPLIES (with a purchase price of \$5,000 or less)**

#### Prior to closing I-TECH:

- Review/update supply inventory list to verify current supply assets (computers, furniture, etc.)
- Make list of supplies to be sold/donated/dispensed of before becoming LE
- Determine country laws, or partner expectations for turning over supplies
- Complete handover letters for supply donations
- Determine who will transport items to recipients, if needed
- Cancel any services associated with supplies being sold/dispensed/donated including copy machine maintenance contracts
- Re-deposit proceeds from any sales of supplies to grant
- Work with HQ to create handover of all supplies to be turned over to LE once legal.

#### Upon opening LE:

- Replace all UW inventory tags with LE's tags
- Update inventory sheet to remove all UW tag numbers and replace with LE's

### **INSURANCE**

- ❖ **Adapt GOM 7 - Insurance**
- ❖ **Write SOPs and adapt all forms**

#### Prior to closing I-TECH, if staying with same insurance companies:

- Work with UW's Broker of Record to identify any new insurance needed if becoming independent from UW
- Work with Broker of Record and I-TECH HQ to rollover current insurance into LE's name**

If changing insurance companies:

- Survey market for insurance providers
- Identify & purchase all mandatory and optional insurance such as, employee medical and life, professional liability, facility and auto**
- Cancel current insurance in I-TECH's name lining up end date with start date of new insurance**

## PROCUREMENT

- ❖ **Adapt GOM 16 - Procurement**
- ❖ **Write SOPs and adapt all forms**
  
- Define roles and responsibilities assuring separation of duties
- Set Direct Buy Limits, if changing**
- Train Budget Managers and SMT on procurement process highlighting changes**
- Have procurement staff review training modules
- Identify all current vendor agreements and provide formal notice that the VA with I-TECH will be terminated and any future orders/agreements will be with a new entity.

## TRAVEL

- ❖ **Adapt GOM 1- Travel**
- ❖ **Write SOPs and adapt all forms**
  
- **Set local per diem rates, if changing**
- Research travel agency, if changing

## VISITORS

- ❖ **Adapt GOM 11 - Visitor**
- ❖ **Write SOPs and adapt all forms**

## VEHICLES

- ❖ **Adapt GOM 12 - Vehicles**
- ❖ **Write SOPs and adapt all forms**
  
- See Equipment section for requirements for transfer of vehicles
- See Insurance for required vehicle insurance

## CONSULTANTS

- ❖ **Adapt GOM 4 - Consultants**
- ❖ **Write SOPs and adapt all forms**

- Seek review of consultant agreement template from legal counsel
- Create consultant invoice template
- Orient Program Managers on process for engaging and working with consultants, and for review and approval of invoices
- Identify all current consulting agreements and provide formal notice that the CA with I-TECH will be terminated and any future agreements will be with a new entity.

## RESOURCES

- HQ Operations Manual