**OPENING A FIELD OFFICE OR PROJECT**

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# **Approval for the Office**

The opening of a new office can be the result of any number of factors, including having recently won a proposal or a large grant for a project in a country where an organization does not currently have an office, or upon deciding that an investment is necessary for the organization to manage existing, growing resources, or to raise additional funds. Environmental circumstances or changing political situations might also be the basis for opening an office.

The procedures in this document provide recommended practices necessary to gain approval for, implement the opening of, and conduct all necessary follow-up activities for opening a new field office. A checklist summarizing the procedures is appended as Exhibit A: Office Opening Procedures Checklist.

Organizations will normally have justifiable reasons for opening an office. The justification can include the following:

* the local needs and current political situation;
* the potential for collaboration and competition;
* ability to work effectively;
* the safety/security of employees;
* the staffing and funding requirements required for project implementation (including an estimated budget for opening and running an office that includes number of staff and salaries, benefits, travel, overhead, and indirect);
* the need to address and provide capacity in response to environmental issues including man made and natural disasters;
* the ability of the organization to provide its expertise in specific areas;
* political considerations or requests;
* and the availability, and long- and short-term strategies, for funding.

The justification will be submitted by designated staff of the organization. If it is determined that it is appropriate to move forward, the designated staff in the organization will implement the steps necessary to inform the organization's senior management and the organization's Board, if required. A sample justification memo is attached as Exhibit B: Sample of Justification Memo to Open an Office.

A recommended step at the senior management level is to have the organization's "Executive Team" or a similarly designated team notify the Board of Directors and ensure that the notification appears in the Board Minutes, as this notification is often necessary to register an office in-country.

If satellite offices need to be opened in a country where the organization is registered and has already opened the first office, Board Approval might not be necessary. Check your organization's requirements or determine the process if no policy currently exists. It is recommended that the senior staff in the country or region and the Executive responsible for operations, finance and program implementation be included in the decision making and communications. As with regular office openings, office lease and office insurance guidelines should be adhered to and copies of the signed lease and insurance policies should be sent to the Manager of the organization's Facilities and Administration at headquarters (HQ).

The mailroom at HQ should also be notified if this new office is to receive mail and courier services with the address of the office and to whose attention mail must be sent