

5 key words:

Guatemala
Petén
Izabal
Office
Start up

This report was made possible through support provided by the US Agency for International Development, under the terms of Contract Number **GHH-1-00-07-00068-01**. The opinions expressed herein are those of the author(s) and do not necessarily reflect the views of the US Agency for International Development.

CLM / LMS Trip Report Template

Process for completing trip report

1. This **trip report** must be completed by the traveler and distributed to the supervisor, relevant team leader, project manager and AdCo within 10 business days of the traveler's return to their home office.
2. The traveler will schedule a **debriefing** with their project manager and, if appropriate, the project team within 10 business days of their return to their home office. This meeting will highlight content for the trip report. If the traveler is a project manager, they will meet with the project team. Ideally, the debriefing will be scheduled prior to the traveler's departure. The appropriate Team Leader can serve as a resource to determine who else should be present at the debriefing.
3. Trip reports and addenda should be saved with the relevant TDY documents in sub-project eRoom.
4. Completion of the trip report and scheduling debriefings is the responsibility of the traveler.
5. In the event a trip report needs to be filed with USAID mission, the traveler must have the report **reviewed by the appropriate Team Leader first**, when possible, and project manager before sending the report to USAID mission.
6. When the entire template is completed, email the report along with all relevant documents to the relevant Program Manager, Team Leader, and AdCo. AdCo will determine if trip report and which documents should be sent to **Institutional Memory**.
7. Save this report using the following naming protocol: sub-project name_ traveler's name_ destination_program year_departure month (i.e. Global Fund-Stash- Pakistan -2006-6).

CLM / LMS Trip Report Template

1. Scope of Work: AIDSTAR-Two Office Start UP in Guatemala

Destination and Client(s)/ Partner(s)	Guatemala City, Petén, Izabal
Traveler(s) Name, Role	Lauren Bailey, Administrative Coordinator
Date of travel on Trip	9-31 July 2009
Purpose of trip	AIDSTAR-Two office start-up
Objectives/Activities/ Deliverables	<ul style="list-style-type: none">• Establishment of basic project infrastructure (office space, registration, bank accounts, initiation of local procurement etc.) in three locations: Guatemala City, Petén and Izabal.• Receive applicant CVs and prescreen candidates
Background/Context, if appropriate.	

2. Major Trip Accomplishments: Should include the major programmatic goals realized, relevant metrics, and stories of impact from the trip.

Office Space

An office space was identified in each of the three locations (Izabal, Petén and Guatemala City). The stats of the offices are as follows:

- Izabal – We found a house in Puerto Barrios that is ready for occupancy. It has 6 individual rooms, a kitchen, 3 bathrooms and plenty of space for a conference room and work stations. A/C needs to be installed (which will slightly augment the rent), but it's in great shape and needs no renovations. The rent will be about \$600-700 a month.
- Guatemala City – We located an office one block away from the Intercontinental Hotel. The PSP-One project is currently situated in the same office building. There is a vacancy on the 5th floor; the office is 154 sq meters with 4 rooms, work stations and reception and rents for \$1463/month. The monthly price is without tax but includes maintenance and security.
- Petén – There are 4 rooms each w/ their own bathroom. One room would serve as the conference and supply room and the others would house 2, 2 and 3 personnel. The location is great and the complex is brand new. The rent will most likely be about \$700-800/month including parking.

Attached to the report are the RSO office security requests that were submitted on July 30 for all three offices. Pending approval from the US Embassy the leases will be drafted, reviewed and signed.

Human Resources

The job descriptions for the various positions were finalized and posted on the MSH website. We also ran an ad in La Prensa Libre that generated great publicity. While in Guatemala City, Petén and Izabal – our Temporary Project Coordinator (Edgar Cajas) scheduled first round interviews with qualified candidates. A follow-up team of MSH HR specialist Martha Rodriguez and AIDSTAR-Two PSO Yadira Almodovar-Diaz will visit Guatemala to help complete the recruitment process and get staff on board.

Registration & Banking

I met with two banks – Citi Bank and BAM Bank – and each presented a similar process for opening an account. What the bank requires is a copy of the completed forms with the appropriate signatures from MSH. They will also need a copy of the signatory's passport if they are non natives. Lastly, we need to submit a notarized letter indicating the status of MSH in Guatemala. The account that we open will say "in formation" until the final

The contents of this report are for the use of CLM / LMS staff only and should not be shared without permission from the individual who completed the report.

CLM / LMS Trip Report Template

steps to legalize MSH in Guatemala are complete -- and we are allotted 60 days to complete the process.

Procurement

I developed the necessary forms required to solicit quotes from vendors and I prepared a detailed list of items to be procured. Because we can procure locally, all request for quotes will be submitted in Guatemala by Jorge Montoya on behalf of MSH. I prepared a "procurement guide" which details the procurement process, and I explained in detail the guidelines Jorge is to follow. A request to procure material with a unit price over \$500 has already been approved by USAID, so once the quotes are analyzed and the vendors selected the offices will be fully equipped.

CLM / LMS Trip Report Template

--

3. Next steps: Key actions to continue and/or complete work from trip.

Description of task	Responsible staff	Due date
Finalize Recruitment	Martha Rodriguez, Yadira Almodovar- Diaz	September 1
Office Lease	Jorge Montoya, Lauren Bailey, John Soden	September 1
Procurement	Jorge Montoya, Lauren Bailey	September 15
Registration / Bank Accounts	Tim Allen, John Soden, Lauren Bailey	October 1

4. Contacts: List key individuals contacted during your trip, including the contacts' organization, all contact information, and brief notes on interactions with the person.

Name	Contact info	Home organization	Notes
Michelle Mendieta	Michelle.mendieta@citi.com	Banco Citibank	I met with Michelle from Citibank to discuss opening a bank account for AIDSTAR-Two. She explained the process and gave me the necessary forms needed to open the account.
Fidel Arevalo	FArevalo@usaid.gov	USAID	I met with Fidel on two separate occasions – Friday, July 10 for an in-briefing and Wednesday, July 29 for an out-briefing. We discussed my SOW and what I planned to accomplish during my three weeks, and in the close out meeting we discussed lose items and next steps.

CLM / LMS Trip Report Template

5. Description of Relevant Documents / Addendums: Give the document's file name, a brief description of the relevant document's value to other CLM/LMS staff, as well as the document's location in eRooms or the MSH network. Examples could include finalized products and/or formal presentations, TraiNet Participant List, Participant Contact sheet, and Meeting/Workshop Participant Evaluation form are examples of relevant documents.

File name	Description of file	Location of file
USAID/G-CAP Memorandum	Security inspection of potential field offices	Attached