Conference Approval Memorandum Template
USAID-Sponsored Conferences

A Mandatory Reference for ADS Chapter 580

Partial Revision Date: 02/26/2021
Responsible Office: M/MPBP/POL
File Name: 580mab_022621

Notes for Drafters:

1. Bureaus and Independent Offices (B/IOs) should submit requests at least 120 days in advance of the proposed event, and no later than 30 days prior to the event's start date. The designated approving official must approve requests *before* a B/IO makes a commitment or incurs costs.

2. Bureaus, Independent Offices, and Missions (B/IO/Ms) must address Action Memoranda to the Administrator, Deputy Administrator, Assistant Administrator (AA), Independent Office Director, or Mission Director based on the estimated direct costs below:

    - The Administrator must sign a waiver to incur costs in excess of $500,000 (excluding salaries and benefits) for a single conference;

    - The Deputy Administrator must approve events with estimated direct costs (excluding salaries and benefits) greater than $100,000 up to $500,000; and

    - The Assistant Administrator, Independent Office Director, or Mission Director must approve events with estimated direct costs (excluding salaries and benefits) of $100,000 or less.

3. Conference coordinators must request approval through the *eConference Tracking and Approval System* (eCTAS) when the cost will exceed $100,000, unless the event meets one of the exceptions outlined in ADS Chapter 580.1:

    - The conference coordinator must upload two versions of the Action Memorandum: The Microsoft Word version and the PDF version initialed by the AA of the B/IO. The designated Conference Point-of-Contact in the B/IO must review and clear the Action Memorandum prior to submission.

    - If Program funds will pay for all or part of the requested conference, the B/IO must copy the Office for Budget and Resource Management (BRM) at **BRMTaskerList@usaid.gov**. The drafter is responsible to provide the info copy to BRM.

4. B/IOs should use the eCTAS automatic calculation to determine the estimated cost for the event, and for the estimated salaries and benefits of USAID employees. The formula for estimated cost per attendee is direct cost divided by the total number of participants.

5. The relevant Mission Director must clear for all conferences held in-country. *Attach a copy of the Mission Director's approval at Tab 4.*

[Month Day, Year]

TO: [Title] [Full Name]

FROM: AA/[Bureau Acronym]—[Full Name]

SUBJECT: Approval of the [Name of Event, Date of Event]

Recommendation

That you approve the [Name of Event], which would take place in [Location of Event] from [Date of Event].

Approve_____ Disapprove_____

Background

The [Name of Event] would take place in [Location of Event] from [Date of Event].

[The background section should include the following information:]

- **Purpose and Expected Outcomes**: State why the conference is essential to USAID's mission and what its benefits to the Agency would be, such as:
    - Enhanced knowledge-sharing and understanding of programmatic approaches and activities across countries and regions;
    - The training of new staff on operations in developing environments; and
    - Results from monitoring and evaluation, such as the identification and sharing of lessons-learned from past and current programs, including those that are changing.

- **Previous Conference**: Indicate if the conference has taken place previously. If so, include the total and per-person costs of the previous conference, along with the total number of days, the location, and the total number of participants.

[***Mandatory section: Edit to reflect your conference approval request***.] In accordance with ADS Chapter 580, I certify that the proposed conference costs are comprehensive and represent the greatest cost advantage to the U.S. Government. The Bureau did consider alternatives to a conference, including videoconferencing, but found that an in-person meeting would be the most-appropriate method of meeting the desired objectives.

[***Explain why alternatives were not feasible***.] The Bureau has entered the details regarding this event in the eConference Tracking and Approval System (eCTAS).

Authorities

Per ADS 580.2 the [Approving Official Title, e.g., Mission Director] has the authority to approve Agency sponsored conferences [dollar threshold level, e.g., below $100,000].

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Resource Implications [***Mandatory content must include***:]

It is anticipated that [Total Number of Participants] people would participate—of which [Total Number] would be USAID employees (*e.g., U.S. Direct Hires [USDH], Personal Service Contractors [PSC], Foreign Service Nationals [FSN], employees on a Participating Agency Service Agreement [PASA], Detailees*); [Total Number] would be USAID-funded institutional contractors; and [Total Number] would be other attendees whose funding their sponsoring organizations will cover.

The estimated direct cost for the proposed event would be [$XXX,XXX], excluding estimated salaries and benefits. The estimated cost per attendee would be [$X,XXX]. The estimated cost for the salaries and benefits of USAID employees would be [$XX,XXX].

Attachments:

Tab 1—Estimated Budget for USAID-Sponsored Conference [Mandatory]
Tab 2—Cost Detail and Cost-Comparison of Three Potential Sites [Mandatory]
Tab 3—Attendance List (USAID Employees) [Mandatory]
Tab 4—Mission Director's Clearance [Mandatory if held in the field]
Tab 5—Additional Background Information [Optional]

CLEARANCE PAGE FOR ACTION MEMO FOR [Copy the Subject Line from first page]

Drafter: [B/IO/Title]:[Name]:[Phone extension];[After Hours Phone No.]
Approved: [B/IO/Title]:[JDoe]

Bureau Level Clearances	**Clearance Status**	**Date**
[B/IO/Title]:[JDoe]	Clear/Info	MM/DD/YY
USAID/[Mission]: [Mission Director]:_____		_____
A-AA/M: [For conferences that requires the Deputy Administrator approval]		
_____	_____	

Tab 1—Estimated Budget for USAID-Sponsored Conference

Estimated Budget for USAID-Sponsored Conference	
Budget Item	Dollar Estimate
Estimated Salaries and Benefits*	
Travel and *Per Diem* Costs ** [This includes airfare, lodging, and *per diem* for USAID employees.]	
Conference Venue	
Refreshments and Meals*** [Note: If meals are provided, reduce the total estimate for *per diem* costs accordingly.]	
Facilitators [Note: Include level of effort, travel, and *per diem*. Organizers should shift to internal facilitators where possible.]	
Usage of Audiovisual and Other Equipment	
Computer and Telephone Access Fees	
Printing - Go Green, where appropriate and feasible.	
Other [*e.g.*, cost for speakers, host-government officials and other participating foreign dignitaries, including invitational travel costs, shuttle service]	
TOTAL (Excluding Salaries and Benefits)	

*The *eConference Tracking and Approval System* (eCTAS) automatically calculates the salary estimate. The following rates are used:

- U.S. Direct-Hire (USDH) and U.S. Personal Services Contractor (PSC) employees: $49/hour, or $392/day; and
- Foreign Service National (FSN) employees: $22/hour, or $176/day.

** Contact USAID's contracted travel agents to obtain a cost estimate for flights. Do not use a discount travel site for cost estimates for flight costs (*e.g.,* Travelocity or Expedia)

Use the following formula to estimate travel and *per diem* costs for employees: Total # of calendar days associated with the conference x *per diem* (lodging and meals and incidental expenses) + airfare.

***(___) Meals will **not** be provided to local staff.
***(___) Meals will be provided to local staff. This event meets the criteria for a training activity and essential training will take place during the meals. Criteria provided below:

1. The purpose of the conference is educational or instructional;
2. More than half of the time is scheduled for a planned, organized exchange of information between presenters and the audience;
3. The content of the conference is germane to improving individual and/or organizational performance;
4. Developmental benefits will be derived from the employee's attendance; and
5. The provision of meals is necessary for the employee to obtain the full benefit of the training.

***(__) Meals will be provided to local staff in accordance with criteria outlined in ADS Chapter 610.

_____
Conference Organizer Signature

Tab 2—Cost Detail and Cost-Comparison of Three Potential Sites

[Conference Venue] Provide information on the three quotes obtained for the conference venue. Bureaus and Independent Offices must seriously consider U.S. Government facilities, if they might be available at a cheaper rate than a commercial facility. Consider moving the date of the conference to accommodate availability.

Information about the three quotes is not required if a suitable U.S. Government facility is available at no cost. If the B/IO is not proposing to use a U.S. Government facility, it must provide a justification (*e.g.*, venue size, capabilities, security, among others).

[Location] Provide an explanation of how your choice of the geographic location reduced the costs of the conference—by taking into consideration costs for the venue and travel for USAID employees and other participants, among others.

Additionally, provide information of any cost-savings activity.

Tab 3—Attendance List (USAID Employees)

[Note: If the participant list is incomplete or unconfirmed, provide a breakout estimate of the number of USAID employee participants by Bureau, Independent Office, and/or Mission.]

[EVENT NAME]			
	USAID Employee [Full Name, Title]	**Office Acronym, Location**	**Justification**
1	*Ex: John Doe, Program Specialist*	*M/MPBP, Headquarters*	*Compelling reason why attendance is needed.*
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Tab 4—Mission Director's Clearance (if conference is taking place in the Field)

[Attach the email or letter from the Mission Director that provides his/her approval if the conference will take place in the field.]

Tab 5—Additional Background Information

Additional background information is not mandatory unless specifically requested by the approving official. The sponsoring Bureau or Independent Office may provide any additional information that the approving official should consider, such as a sample agenda for the conference, the conference website, or any other background information.

[Discuss Cost/Expense Details under Tab 2]

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