



Answers to Frequently Asked Questions on USAID's Conference Policy

An Additional Help for ADS Chapter 580

Partial Revision Date: 02/26/2021
Responsible Office: M/MPBP/POL
File Name: 580sab_022621

FREQUENTLY ASKED QUESTIONS
Conference Planning and Attendance

GENERAL QUESTIONS

1. Whom do I contact if I have questions about planning a conference, attending an event, or the Agency's conference policy?

Each Bureau and Independent Office (B/IO) has a designated Primary Point of Contact (POC) for Conferences. To obtain the name of your POC, please send a request to the Bureau for Management's Conference Management Team at eConference@usaid.gov.

2. Where do I submit a request to sponsor an internal conference?

For conferences that require the approval of the Deputy Administrator (*e.g.*, conferences greater than \$100,000), the responsible B/IO must submit an action memorandum from the Assistant Administrator or Independent Office Director to request the approval. B/IOs can make requests in the eConference Tracking and Approval System (eCTAS). Events must be approved in accordance with the procedures outlined in [ADS 580, Conference Planning and Attendance](#). Missions must coordinate the approval package with their Bureau's designated Primary Point of Contact (POC) for conferences. To obtain the name of your POC, please send a request to the Bureau for Management's Conference Management Team at eConference@usaid.gov.

For conferences that require the approval of Bureau, Independent Office, and Mission (B/IO/M) Assistant Administrators and Directors (*e.g.*, conferences with ten or more employees in travel status to attend with estimated costs of \$100,000 or less), the conference coordinator can submit the action memo to their respective Assistant Administrator, Independent Office Director, or Mission Director. Prior to obtaining approval, conference coordinators must obtain clearance from their designated B/IO Primary Point of Contact (POC) for conferences to ensure compliance with conference policy (*e.g.*, verification that the conference has been registered in eCTAS and required documentation uploaded).

3. Where can I find the link for eCTAS?

You can find a link [here](#) or under the "Management Services and Tools" section on the front page of MyUSAID.

4. Do I need a username and password for eCTAS?

You can access eCTAS with your USAID network username and password.

5. What is the definition of a "conference"?

A “conference” is a seminar, meeting, retreat, symposium, workshop, training activity or other such event, regardless of whether travel is involved.

6. What is the definition of “USAID employee”?

For the purposes of the Agency’s conference policy, a USAID employee is a Direct-Hire employee, personal services contractor (PSC), including Cooperating Country National (CCN) and Third-Country National (TCN), Foreign Service National (FSN), an individual detailed to USAID from another Federal Government department or Agency, and Participating Service Agreement (PASA).

7. Does the conference approval process apply to all training activities?

No. Certain training events are excluded from the reporting and approval process. A list of exceptions is found in the overview section (580.1) of [ADS 580, Conference Planning and Attendance](#).

8. Who is the approving official for internal conferences?

The Administrator (A/AID) must approve a waiver to fund a single conference with estimated costs in excess of \$500,000.

The Deputy Administrator approves expenditures for conferences with estimated costs greater than \$100,000 up to \$500,000.

The Assistant Administrator, Independent Office Director, or Mission Director approves conferences when ten or more USAID employees in travel status are expected to attend and estimated direct costs are \$100,000 or less.

9. Does the Office of General Counsel (GC) and the Bureau of Legislative and Public Affairs (LPA) need to clear conference memos?

GC only clears conference memos when there is a potential ethics issue. B/IOs should consult LPA when an employee is a proposed speaker for an external conference.

USAID-SPONSORED CONFERENCES

10. Do all USAID-sponsored conferences require approval?

No. Approval is required to fund a conference that 10 or more USAID employees in travel status are expected to attend, regardless of cost, or for which the net conference expenses by USAID would exceed \$100,000 (excluding salary of employees), regardless of the number of attendees or the travel status of employees. Grant funding is exempt from the approval process, and B/IOs should not include it in determining the dollar threshold. (See [ADS 580sac, Conference Approval Requirements Matrix](#) and [ADS 580.1](#) for the full list of exceptions to the approval process.)

11. We plan to convene a three-day conference for Mission Directors with approximately 75 USAID staff in travel status. The venue would be the Washington Learning Center, so the only expenses would be travel costs and light refreshments, which would total \$120,000. Does this conference fit under the "Mission" exception?

Yes. The exception would apply.

12. What is the process for approval to hold a USAID-funded conference?

For conferences that require the Deputy Administrator's approval, the B/IO must enter a request in the eCTAS and upload the required supporting documentation in the system. The POC listed in the system will receive an acknowledgement e-mail when the request is entered and another email to provide the approving official's decision. The Conference Management Team or the Office of the Executive Secretary may request additional information (see ADS [580.3.3 USAID-Sponsored Conferences](#)).

13. Who is responsible for requesting approval for a conference hosted by a Mission, but funded by a B/IO in Washington, D.C.?

The B/IO that is funding the conference must request approval. For example, the Management Bureau would request approval if it plans to host a conference in Lima.

14. When should I submit a request to sponsor a conference?

The conference coordinator must obtain approval before making commitments or incurring costs. Ideally, the B/IO should submit the approval package at least 120 days prior to the start date and must request approval at least 30 days prior to the start date.

15. Is approval required if an implementing partner is funding a conference under a grant or cooperative agreement?

No. A conference funded from a grant or a cooperative agreement is exempt from the approval process, unless non-grant expenditures associated with the conference (*e.g.*, travel costs for USAID employees) exceed the threshold criteria.

16. Is approval required for the Mission to hold an all-hands meeting or retreat at the Mission Director's residence? There are no costs associated with the meeting, but employees would receive lunch and light refreshments at an estimated cost of \$2,000.

Approval is not required because no employees are in travel status and the cost is less than \$100,000.

17. Is approval required to hold routine meetings throughout the year with implementing partners? USAID participation will range between 10-15, and the locations would vary between Washington and the field.

These types of meetings often qualify for the “Mission” exception when the purpose of travel is to attend meetings to discuss USAID’s programs and operations, or to perform operational or managerial activities. To qualify under the “Mission” exception, travel and light refreshments must be the only direct costs associated with the event. Approval would be required if 10 or more employees are in travel status and the direct costs include expenses other than travel and light refreshments (*e.g.*, a venue).

18. Several times each year, we send more than 10 employees from our Bureau to meet with implementing partners to review progress on USAID-funded initiatives. In most cases, we rent a venue and provide lunch. Is approval required for this type of meeting?

Approval is required when 10 or more employees in travel status are expected to attend, regardless of cost, unless the event meets one of the exceptions outlined in [ADS 580.1](#). In this case, approval would be required, since the Bureau would incur costs for a venue.

19. The policy states that when considering venues, B/IOs must consider a U.S. Government venue. Does this apply to host governments, or is it specific to U.S. Government venues?

The policy is specific to U.S. Government venues be available at no charge, or for a fee. USAID’s Washington Training Center or other USAID facilities should be the venue of first choice when feasible.

20. Should I include the salary costs for employees when calculating the direct costs for a USAID-sponsored conference?

B/IOs should not include salary costs in the calculation of the direct costs of a conference. However, they should include them in the Action Memorandum, and in the budget template. The approving official will consider both the direct cost and indirect cost (salary) when making a decision regarding the cost-effectiveness of the conference.

21. Do I need to provide information on the number of USAID-funded institutional contractors proposed to attend a USAID-sponsored conference?

Yes. The B/IO must provide the number of institutional contractors proposed to attend a conference in eCTAS and in the Action Memorandum but should not include travel costs for institutional contractors in the conference budget.

22. How are participants notified that they are approved to attend a USAID-funded conference?

The Conference Coordinator will notify participants when an event is approved.

23. Are participants in USAID-sponsored conferences required to enter a request in eCTAS to attend a USAID-funded conference?

No. Participants do not have to enter a request in eCTAS to attend a USAID-sponsored conference. The Conference Coordinator will inform participants.

24. We have a Participating Agency Program Agreement (PAPA) with another Federal Agency funded with USAID's Program funds. We will fund the conference partially through the PAPA agreement. Does the contribution count toward the \$100,000 threshold?

Yes. The policy is applicable to events funded with USAID funds, including those hosted by partners and contributions from Inter-Agency Agreements funded by USAID.

25. Should the conference budget for a USAID-sponsored conference include the full contract cost for a facilitator who is providing services for several events?

No. The budget should only include the cost attributable to the specific event.

26. A list of participants must be provided for a USAID-sponsored conference. What should I do if I need approval to secure the venue before the participant list is finalized?

When approval for a venue is necessary but the full list of participants is not yet known, the sponsoring B/IO may replace the full list with an estimate per B/IO.

27. Are there limitations on the number of employees who can attend a conference from each B/IO or Mission?

B/IOs should consider inviting the minimum number of attendees needed to achieve the goals of the conference.

28. The mission is sponsoring an instructor-led course and does not have a room large enough to accommodate the group. Is approval required to rent a room at a local hotel?

No. Approval is not required. The policy provides an exemption for instructor-led training held at a hotel or other commercial venue when space is not available at a U.S. Government training facility.

29. When USAID provides a sponsorship (e.g., \$20,000) for an event hosted by an external party (and we are one of a dozen or so sponsors), does that conference fall into the "USAID sponsored" category?

No. The event would not be USAID-sponsored. In this instance, USAID would have no influence over the planning for the event. The policy regarding external events outlined in [ADS 580, Conference Planning and Attendance](#), would apply if USAID employees are attending.