PREPARING FOR YOUR USAID POST-AWARD ORIENTATION CONFERENCE
“How to Work with USAID” Training Series

Visit WorkwithUSAID.org to learn more.
LEARNING OBJECTIVES

- Review best practices as you prepare for your post-award conference.
- Understand what to expect regarding the participants and the purpose of the meeting.
- Discover how to use this opportunity to better manage your award and enhance your partnership with USAID.
WHY USAID PARTNERS WITH ORGANIZATIONS

USAID Mission:

To lead the U.S. Government’s international development and disaster assistance efforts.

USAID offers this assistance on behalf of the American people through partnerships and investments that:

- Save lives;
- Reduce poverty;
- Strengthen democratic governance; and
- Help people emerge from humanitarian crises and progress beyond assistance.
RULES AND REGULATIONS

Two sets of general regulations govern USAID awards.

U.S. GOVERNMENT REGULATIONS

● The Code of Federal Regulations (CFR) governs how USAID issues acquisition and assistance awards.
● Federal Acquisition Regulations (FAR) include primary rules that guide how U.S. Government agencies acquire supplies and services.

USAID INTERNAL POLICIES

● The Automated Directives System (ADS) outlines operational policies covering all Agency and partner activities. Assistance awards are governed by ADS Chapter 303: “Grants and Cooperative Agreements.” Acquisition awards are governed by ADS Chapter 302: “Direct Contracting.”
● USAID Acquisition Regulations (AIDAR) govern how USAID administers public funds.
YOUR USAID CONTACTS

ASSISTANCE AWARDS
(Grants and Cooperative Agreements)

- **Agreement Officer (AO)** has the authority to enter into, administer, and terminate award agreements. The AO is able to change an award’s statement of work, period of performance, and requirements.

- **Agreement Officer’s Representative (AOR)** is your main point of contact with USAID and monitors your progress and verifies that the activities conform to the award agreement.

ACQUISITION AWARDS
(Contracts)

- **Contracting Officer (CO)** has the authority to enter into, administer, and terminate award agreements. The CO is able to change an award’s statement of work, period of performance, and requirements.

- **Contracting Officer’s Representative (COR)** is your main point of contact with USAID and is responsible for technical oversight and administration of the award.

Read your award Designation Letter to understand the role of your AOR or COR.
PREPARE FOR YOUR CONFERENCE
THE MOST CRITICAL STEP: READ YOUR AWARD

Prepare for your post-award conference by reading your award in full.

In advance of the meeting, provide the award documents to all key personnel from your organization.
As you examine your award, take notes on requirements.

You can expect to find sections on:

- Roles of Agency staff and your organization’s staff;
- Statement of work;
- Supplies and services;
- Inspections;
- Deliveries or performance;
- Any special contract requirements; and
- Attachments related to the administration of your project.
Prepare any questions and send them to your AOR or COR in advance.

Consider these questions as you read your award:
- Who from USAID receives my deliverables, and when are they due?
- How will my organization be paid or reimbursed by USAID?
- When and how should my organization ask for an additional obligation?
- What are the tax (VAT) requirements for my award?
- When and how do I need to seek approvals from my CO, AO, or their representative?
- What audits are required by USAID?
- Are there formats for deliverables and invoice submissions—or any templates I should use?

Note the following actions you should take immediately:
- Make a list of required deliverables with deadlines; and
- Map out a timeline for the project.
WHAT TO EXPECT
MEET RELEVANT PERSONNEL

USAID
- CO or AO and COR or AOR;
- Financial Management Office representative;
- Environmental compliance representative;
- Program or technical staff; and
- Development outreach and communication representative.

YOUR ORGANIZATION
- Chief of party or team leader and their relevant deputies;
- Finance and operations manager;
- Staff members who will provide primary administrative oversight for the project; and
- Any key personnel.

Ensure sub-partners are kept informed and participate in post-award activities.
Your AO or CO and their representative will outline expectations for:

- Work and management plans;
- Monitoring, evaluation, and learning (MEL) plan;
- Quarterly, annual, and final reports;
- Branding and marking requirements; and
- Financial reporting and invoicing.

Your organization may share plans for hiring, office infrastructure, and follow-up meetings.

Learn more about these topics through the full USAID training series and at WorkwithUSAID.org.
BUILD YOUR RELATIONSHIP WITH USAID CONTACTS

A positive working relationship between you and your COR or AOR ensures smooth collaboration throughout implementation of your award.
Establish communications practices that encourage successful coordination and facilitate helpful feedback.

Ask your COR or AOR:

- What types of meetings are needed?
- How frequently should you meet?
- What are their preferred communication tools?
- Who else should be included in your meetings with USAID?
Good implementation starts with a comprehensive understanding of the operating environment and USAID’s goals.

Ensure that your understanding of the local context aligns with USAID’s strategies for the region—before the meeting:

● Read the Mission’s Country Development Cooperation Strategy (CDCS);
● Study current political and economic events in the country; and
● Prepare questions to ask USAID staff about their understanding of the environment.
CONFIRM DETAILS AND PROCESS

- **Clarify deliverables and deadlines.** Pay special attention to deliverables due in the first few months.

- **Ask if there are templates** USAID recommends you use for each deliverable.

- **Discuss preferences for reviewing drafts** so your AOR or COR can provide feedback before final submission dates.
AFTER THE CONFERENCE: NEXT STEPS
NOTES AND FOLLOW-UP

- Designate at least one team member from your organization to **take notes**.

- Afterward, **share the consolidated notes** with all participants, including those from USAID, to ensure everyone has the same understanding.

- You may **share the plan** for your award with the rest of the Mission, Bureau, or Operating Unit. Always copy your AOR or COR on **any** communication with USAID.

- **Debrief with your full team**—including any sub-partners—so the deliverables and due dates are clear for all responsible.
SUMMARY OF KEY POINTS

- **Read** your award.
- Prepare yourself for the conference by reviewing **who you will meet** and **what will be covered** at the conference.
- Take the opportunity to ask any and all **questions**.
- Establish a foundation for **effective working relationships**.
- Understand **roles and responsibilities**.
RESOURCES

● ADS: Chapter 302, “Direct Contracting”; Chapter 303, “Grants and Cooperative Agreements”
● USAID’s “Acronym Soup” and Glossary of ADS Terms
● Country Development Cooperation Strategy
● Elements of Compliance Quick Reference Guide
● “How to Work with USAID” training series:
  ○ “Building Strong Sub-Partnerships”
  ○ “Monitoring, Evaluation, and Learning”
  ○ “Branding and Marking”
  ○ “Preparing Progress Reports”
  ○ “Financial Reporting”
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Email questions and feedback: IndustryLiaison@usaid.gov
The power of partnership starts here.

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