



**USAID**  
FROM THE AMERICAN PEOPLE

## FY2023 Annual Conference Report



Photographer: Andres Felipe Castilla, FHI 360 Strengthening Together Activity, 2023 DRG Photo Context Top 10 Finalist, November 9, 2023.

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## **OVERVIEW OF CONFERENCE EXPENSES**

The Office of Management and Budget (OMB) Memorandum M-17-08 amending M-12-12, Promoting Efficient Spending to Support Agency Operations, directs agencies to report conference expenses for the previous fiscal year on their public websites. This report provides a summary of expenses incurred by the U.S. Agency for International Development (USAID) for conferences held during Fiscal Year (FY) 2023, along with more detailed information on conferences where the net expenses associated with the event exceeded \$100,000.

During FY 2023, USAID sponsored fifteen (15) conferences totaling \$6,983,852.00 with an average per participant cost of \$3,013.57. A total of 2,719 USAID employees participated in these events, along with 451 outside participants. Per Memorandum M- 17-08, additional information is provided on these conferences.

M-17-08 also requires that agencies publish the rationale and approval to incur expenses exceeding \$500,000 on a single conference. USAID sponsored four (4) conferences, in total, that exceeded this threshold during FY 2023.

**USAID SPONSORED CONFERENCES WITH EXPENSES EXCEEDING \$100,000**

Title	Description of How Conference Advanced Mission	Event Start	Event End	Location	Total USAID Participants	Total Outside	Estimated Direct Cost
Mission Directors' Conference	<p>This conference will serve as an opportunity to highlight the State of the Agency (SOTA); in particular, the progress to date on the priority areas that will be described in the USAID Policy Framework, as well as the challenges and opportunities ahead; 1) Build the understanding of, and capacity to advance the implementation of Agency priorities related to localization and inclusive development and improve MDs' knowledge of policies, guidance, and tools related to these priorities; Improve the accountability and strengthen the leadership skills of MDs - in particular, those related to DEIA; Foster peer-to-peer learning and information-exchange; and Allow sufficient time for MDs to interact with Regional Bureaus, Congress, and interagency partners, as needed.</p>	October 24, 2022	October 28, 2022	Washington, DC	<p>150  cost per attendee: \$3,326.97</p>	0	\$499,045.00
Global Program Officers' Conference 2022	<p>The PO Conference is essential to USAID's mission as it will allow for focused, uninterrupted discussion on Agency priorities, challenges in the field, and the implementation of the Administration's most important initiatives. It is estimated that POs spend up to 60 percent of their time reporting to headquarters, in addition to the aforementioned duties above, which can also include managing the bilateral assistance agreement. The PO Conference will benefit the Agency by: 1) Informing and educating POs to implement the</p>	October 24, 2022	October 28, 2022	Virginia, USA	<p>413  cost per attendee: \$973</p>	0	\$789,515.00

	<p>policy priorities (COVID-19, climate change, gender, localization, etc.) of the current Administration; 2)Increasing PO capacity to advance Agency development and operational policies and initiatives through the provision of real-time guidance and tools; 3)Providing an opportunity for POs to give focused, in-depth feedback on high-priority policy and operational initiatives in a way that is not possible while working in the field; 4) Fostering peer learning and information exchange on new approaches, evidence-based decision making, lessons learned, and best technical practices related to key program cycle functions and cross sectoral priorities; and, 5) Providing professional development, skill building, and networking across all hiring mechanisms, Foreign Service (FS), Foreign Service National (FSN), and Civil Service (CS).</p>						
4th Annual Local Partner Meeting	<p>This meeting is critical for supporting USAID's Agency Localization goals and further progressing toward the PEPFAR priority to shift 70 percent of direct funding to local partners. The meeting will provide an opportunity to hear directly from USAID/PEPFAR's 170 prime local nongovernmental organizations (NGO) and government partners. This year an additional 30 Local Partners supporting broader Global Health programs will also be invited to participate. Local Partners attending the event will have an opportunity to present their best practices in global health programming. The meeting will also provide a forum for peer- to-peer learning and technical and operational discussions of HIV and Health programming, as well as an opportunity for USAID leadership</p>	November 14, 2022	November 18, 2022	Johannesburg, South Africa	550  cost per attendee: \$2,338.16	0	\$1,285,988.00

	<p>to hear directly from local partners on their successes and challenges working with USAID. The meeting has three high-level objectives: 1) Ensure technical and operational excellence of USAID/Health programs implemented through local governmental and nongovernmental partners; September 27, 2022 2) Strengthen relationships between USAID and local partners through listening sessions and leadership engagement to elevate local voices as part of decision making; 3) Strengthen communities of practice between local organizations to build networks and learning platforms. The pre COP23 meeting serves as an opportunity for staff from the USAID Office of HIV/AIDS (OHA) and USAID PEPFAR country offices to learn together and exchange on USAID's priorities for Fiscal Year (FY) 2023 PEPFAR operational planning.</p>						
<p>Africa Climate Mainstreaming Workshop</p>	<p>Focal topics for the event include, but are not limited to: 1) Operationalizing the USAID 2022- 2030 Climate Strategy 2) Climate mitigation, adaptation, and resilience with a focus on localization and equitable climate action 3) Climate finance 4) Supporting partner countries with their climate policies, processes, and commitments 5) Integrating climate change into cross-sectoral program design and implementation 6) Integrating climate change into U.S. strategies to the region, such as the U.S. Global Food Security Strategy 2022 - 2026 and U.S. Global Water Strategy 2022 – 2027, 7) Working with the State Department to achieve climate action.</p>	<p>February 27, 2023</p>	<p>March 2, 2023</p>	<p>Cape Town, South Africa</p>	<p>92  cost per attendee: \$3,409</p>	<p>0</p>	<p>\$313,668.00</p>

<p>2023 Latin America and Caribbean Environment Officers' Conference</p>	<p>This regional conference will provide guidance and peer-to-peer learning exchanges for USAID staff working on climate change and other environment programming in the LAC region, including guidance on key Agency strategies, initiatives, and priorities. Focal topics for the event include, but are not limited to: 1) Operationalizing the USAID 2022-2030 Climate Strategy 2) Climate change mitigation, adaptation, and resilience 3) Climate finance 4) Pathways to supporting local and equitable climate action 5) Sector specific topics including environmental and social safeguards; illegal, unreported and unregulated fishing; combatting conservation crimes; water resources management; modernizing utilities; commodity-driven deforestation; integrating modern energy; urban adaptation, and others. The workshop will focus on the unique challenges, risks, and opportunities related to planning, designing, and implementing biodiversity, energy, and climate programming at USAID and integrating these considerations across other sectors. Our goal is to design an event where we exchange knowledge such that participants are able to walk away with practical and actionable solutions.</p>	<p>March 6, 2023</p>	<p>March 10, 2023</p>	<p>Bogota, Colombia</p>	<p>73  cost per attendee: \$3,516</p>	<p>0</p>	<p>\$253,216.00</p>
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<p>PIVOT Climate Champions Practicum Kick-off</p>	<p>The majority of PIVOT CCP program was hosted virtually. However, the in-person kick-off workshop was essential to the USAID's mission and benefits the Agency through: 1) Building the foundation for lasting networks and connections across Missions in the Agency 2) Engaging Missions is cross-Agency learning and knowledge sharing on climate action 3) Providing a focused learning environment for individuals and Mission teams to build and practice CLA and leadership skills that are essential to their success 4) Facilitating deep learning between the field and DC staff, 5) Offering coaching opportunities to immediately apply learning to priority Mission climate actions.</p>	<p>March 13, 2023</p>	<p>March 17, 2023</p>	<p>Virginia, USA</p>	<p>50  cost per attendee: \$3,659</p>	<p>0</p>	<p>\$182,955.00</p>
<p>Africa Regional Education Workshop (AREW) 2023</p>	<p>This workshop will provide the opportunity for USAID/Washington and field staff to discuss Mission-critical priorities for USAID education programming in Africa. It will strengthen education officers' capacities to design and manage programs that will increase return on investment, potential for scale, and sustainability and will build networks among Mission staff. The workshop will: 1) Provide technical training for USAID education staff, including an exchange of lessons learned and best practices in all aspects of education activity design, implementation, monitoring, and evaluation. 2) Share the Administrator's priorities that affect education programming (localization, climate change, resilience,</p>	<p>March 13, 2023</p>	<p>March 17, 2023</p>	<p>Kigali, Rwanda</p>	<p>61  cost per attendee: \$2698.49</p>	<p>0</p>	<p>\$164,608.00</p>



	<p>etc.). 3) Provide AFR updates including on Presidential Initiatives (Young African Leaders Initiative [YALI] and Digital Africa). 4) Strategize how to support the Transforming Education Summit's Commitment to Action on Foundational Learning in partnership with host country Ministries of Education and how to build local capacity to use data more effectively in programming and policymaking.</p>						
<p>2023 M Bureau Summit: M Does Development</p>	<p>Progress Beyond Programs: M Does Development and will extend acute focus on four priorities: (1) Transforming our workforce, (2) Changing how we deliver assistance, (3) Addressing the most pressing challenges of our time, and (4) Being operationally ready. Each inflection point unfolding around the world requires close examination of what our development solutions provide and how we make that possible. The M Bureau is an important foundation for global response with approximately 500 U.S. direct-hires (USDHs) in Washington, 315 Foreign Service Officers (FSOs) in the M backstops (Controller, Contracting Officer, and Executive Officer [EXO]), 9601 Foreign Service Nationals (FSNs) serving in these backstops, as well as hundreds of contractor (PSC and ISC) personnel.</p>	<p>May 1, 2023</p>	<p>May 5, 2023</p>	<p>Maryland, USA</p>	<p>600  Cost per attendee: \$2,870</p>	<p>0</p>	<p>\$1,539,250.00</p>

<p>Resident Legal Officer (RLO) Conference 2023</p>	<p>Having a regular in-person GC/RLO Conference is the best way to provide an opportunity for our Washington and field-based staff to learn about and discuss new Agency and USG priorities, relevant legal issues affecting the Agency, and share lessons learned and best practices to maximize the effectiveness of our lawyers in supporting the Agency's achievement of its mission.</p> <p>Additionally, since March 2019, USAID has onboarded 37 new staff members with many of those starting since COVID-19, meaning that most of them are still relatively new to the Agency and have not ever met most of their colleagues in person before. As the Agency seeks to take measured risks in politically repressive and insecure environments, legal issues such as terrorist financing and sanctions are increasingly important and require well- prepared lawyers to help navigate. Although we are still formulating our agenda, during the first two days of the conference, we intend to hold plenary sessions on important legal issues and hear from Agency leadership on some of the main priorities and challenges that will affect our clients.</p>	<p>May 8, 2023</p>	<p>May 10, 2023</p>	<p>Washington, DC, USA</p>	<p>122  cost per attendee: \$2,597</p>	<p>0</p>	<p>\$231,049.00</p>
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Ukraine Strategic Transition Planning Session	<p>The STPS will serve as an opportunity to take stock of the Mission portfolio, the current context, and plan for short, medium, and long term scenarios as well as establish team cohesion. The in-person planning session will allow for enhanced knowledge sharing and understanding of programmatic approaches and objectives across Ukraine and in the region. This planning session will conclude with entering, departing, and remaining staff feeling involved, prepared, and empowered for this forthcoming transition. Given the criticality of this transition and the outsized role of USAID/Kyiv in overall U.S. government (USG) assistance to Ukraine, it is also planned for Ambassador Brink to join this session.</p>	May 15, 2023	May 18, 2023	Krakow, Poland	49  cost per attendee: \$6,086	1	\$304,334.00
USAID Global Health Leaders' Meeting	<p>The meeting will be an opportunity for the GH and Regional Bureaus to convene senior-level health staff from all field Missions, including Foreign Service Nationals. Participants will obtain updates on changes in Agency policy and priorities, notably the new Agency Policy Framework. They will discuss policies, trends, strategies, and processes relevant to health, as well as cross-sector approaches that affect health. Working relationships among Operating Units across regions will be strengthened, as well as ongoing communications between Missions and USAID/Washington. The meeting is essential to increase communication and enhance knowledge-sharing between USAID headquarters, field Missions, countries, and geographic regions.</p>	May 15, 2023	May 19, 2023	Washington, DC, USA	185  cost per attendee: \$3,769	0	\$697,333.00

<p>DIIA in DC</p>	<p>The purpose of this event is to: 1) Showcase to an American audience the success of Ukraine's USAID supported digital transformation and continued efforts to strengthen Ukraine's tech industry even in a time of war. 2) Highlight the longstanding multi donor partnership among USAID, UKAID, and the Ministry of Digital Transformation that made Diia possible. 3) Follow upon the Davos announcement that USAID would support the expansion of Diia to new countries.</p>	<p>May 23, 2023</p>	<p>May 23, 2023</p>	<p>Washington, DC, USA</p>	<p>200  cost per attendee : \$300</p>	<p>300</p>	<p>\$150,000.00</p>
<p>Regional Foreign Service National (FSN) Conferences (LAC)</p>	<p>1) Increase FSN knowledge of how regional development trends and priorities advance Agency goals; Identify regional FSN issues and share the top priorities with the FSN AC, Bureau representatives, and Washington leadership; 2) Serve as an opportunity to highlight the State of the Agency (SOTA); in particular, the progress to date on the priority areas described in the USAID Policy Framework, as well as the challenges and opportunities ahead; 3) Build the understanding of, and capacity to advance, the implementation of Agency priorities related to localization and inclusive development and improve local staff's knowledge of policies, guidance, and tools related to these priorities; 4) Improve the accountability and strengthen the leadership skills of FSNs - in particular, those related to diversity, equity, inclusion, and accessibility (DEIA);</p>	<p>August 21, 2023</p>	<p>August 25, 2023</p>	<p>San Salvador, El Salvador</p>	<p>56  Cost per attendee: \$3,603</p>	<p>0</p>	<p>\$216,160.00</p>

	<p>5) Share key, current information and best practices;</p> <p>6) Foster peer-to-peer learning and information exchange, working across cultures to include Americans and local staff; and</p> <p>7) Allow sufficient time for FSNs to interact with Regional Bureaus, Agency Leaders, and their peers, as needed.</p>						
Africa Food Systems Summit (AFSF)	<p>The AFSF (formerly AGRF) is one of the most important annual events in sub-Saharan Africa convening major stakeholders in Africa's food systems and therefore provides a critical forum for RFS to collaborate with as many partners as possible. The ASFS is an annual event—with a rotating location among African countries—that is hosted by the USAID-certified Public International Organization, AGRA. It is also imperative that USAID's bilateral and Africa-based missions attend because many of their implementers, senior and counterpart government officials, and Washington based colleagues will be there. USAID contributes to AFSF annually and co-chairs two of the main platforms.</p>	September 4, 2023	September 8, 2023	Darussalam, Tanzania	58  cost per attendee: \$3,316	0	\$192,157.00

<p>Youth Engagement Summit</p>	<p>The Inclusive Development Hub in the Bureau for Development, Democracy, and Innovation (DDI/ID) will host the first-ever USAID Youth Engagement Summit in Accra, Ghana, in September 2023. The Summit aims to strengthen the capacity of USAID Youth Advisors, Youth Points of Contact (POCs), and Youth Specialists throughout Africa Missions, to become more effective champions for youth engagement and programming at their Missions and respective countries.</p> <p>Summit will have the following specific objectives:  1) Provide concrete strategies for youth engagement that advance USAID's updated Youth in Development Policy and localization agenda; 2) Introduce youth engagement frameworks as key resources to operationalize the Policy; and 3) Share best practices among USAID staff on youth engagement across the USAID program cycle</p>	<p>September 11, 2023</p>	<p>September 15, 2023</p>	<p>Accra, Ghana</p>	<p>60  cost per attendee : \$2,742</p>	<p>150</p>	<p>\$164,574.00</p>
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## USAID SPONSORED CONFERENCES WITH COSTS EXCEEDING \$500,000 ON A SINGLE CONFERENCE

### ACTION MEMO FOR ADMINISTRATOR POWER

Date: April 27, 2022

From: AtA/PPL - Michele Sumilas /s/

Subject: Waiver and Approval for the 2022 Global Program Officer Conference

**Recommendation:** That you sign the waiver to incur costs in excess of \$500,000 and approve the 2022 Global Program Officer Conference to be held in Washington, D.C., from October 31 - November 4, 2022, if the Agency's COVID-19 operating posture permits.

Approve

05/01/2022



Disapprove \_\_\_\_\_

### BACKGROUND

The 2022 Global Program Officer Conference, if approved, would take place from October 31 - November 4, 2022. As per the Agency's Reentry Guidance, in-person conferences and other events may be implemented after March 22, 2022, subject to approval. PPL requests that the 2022 Global Program Officer Conference be in person but will research and prepare back-up plans for a virtual conference in case of a change in posture. The Front Office must make a final decision on conference attendance (in-person vs. virtual) by May 1, 2022, to ensure adequate time for planning. If Agency guidance does not allow for in-person events, the conference will proceed as a modified virtual event.

### Why the Agency needs a Program Officer Conference

Program Officers (PO) are the focal point for managing the USAID portfolio in any Operating Unit in the field. As the coordinators for all things related to the program cycle, POs are often knowledgeable about each activity implemented in a given Mission and are sought after to provide perspective on Agency-wide policy development. POs lead Missions in (1) creating Country Development Cooperation Strategies (CDCSs) through the use of data and evidence, ensuring policy coherence, and Washington collaboration, review, and approval; (2) planning for evaluations and assessments; (3) using evidence-based decision making; (4) assessing and reporting program/project/activity performance; (5) budgeting; (6) responding to requests for information; (7) overseeing interagency collaboration at post; (8) and coordinating engagement with other donors, the private sector, and local stakeholders.

- **Purpose and Expected Outcomes:** The PO Conference is essential to USAID's mission as it will allow for focused, uninterrupted discussion on Agency priorities, challenges in the field, and the implementation of the Administration's most important initiatives. It is estimated that POs spend up to 60 percent of their time reporting to headquarters, in

addition to the aforementioned duties above, which can also include managing the bilateral assistance agreement. The PO Conference will benefit the Agency by:

- Informing and educating POs to implement the policy priorities (COVID-19, climate change, gender, localization, etc.) of the current Administration;
  - Increasing PO capacity to advance Agency development and operational policies and initiatives through the provision of real-time guidance and tools;
  - Providing an opportunity for POs to give focused, in-depth feedback on high-priority policy and operational initiatives in a way that is not possible while working in the field;
  - Fostering peer learning and information exchange on new approaches, evidence-based decision-making, lessons learned, and best technical practices related to key program cycle functions and cross-sectoral priorities; and,
  - Providing professional development, skill building, and networking across all hiring mechanisms, Foreign Service (FS), Foreign Service National (FSN), and Civil Service (CS).
- **Previous Conference:** In 2019, the Agency held a four-day Worldwide Program Officer Conference at the Crystal Marriott Gateway, Crystal City, Virginia, with a total of 258 participants. The estimated cost in the approval memo was \$499,887 (excluding salaries) with an average cost of \$1,923 per person.

In accordance with Automated Directives System (ADS) Chapter 580, PPL certifies that the proposed conference costs are comprehensive and represent the greatest cost advantage to the U.S. government.

PPL has researched various scenarios (i.e., in person, virtual, and hybrid) to determine the most-appropriate and cost-effective method to meet the desired conference objectives. These scenarios are explained at Tab 2, Cost Detail and Cost-Comparison of Three Potential Sites. Once the conference is approved, PPL will enter the details regarding this event in the eConference Tracking and Approval System (eCTAS).

- **Benefit of In-Person Conference:** The Program Officer's Conference provides a unique opportunity to gather the Mission staff who are responsible for ensuring that all Mission programming aligns with policy and programmatic priorities, incorporating state of the art evaluation and learning techniques are embedded in all Mission project designs and strategies and sharing new ways of doing business supported by the Administrator (i.e. localization, private sector engagement, and leveraging of new partners to achieve our development goals) are incorporated into Mission programs.



Holding this conference in person will ensure that Program Officers are fully engaged in the discussion, engage in peer-to-peer learning opportunities to share lessons learned in a collaborative and engaging manner, and engage directly with agency leadership who are leading on key development programmatic advances that will ensure that our assistance is more efficient and effective. We believe that this shift from on-line or hybrid training and engagement is important at this time when the world and USAID are facing the reversal of many global health and development gains achieved over the past decade due to the growing number of crises, including climate change, the war of aggression in Ukraine and democratic back-sliding leading to greater authoritarianism and the spread of disinformation.

## **AUTHORITIES**

M Bureau finds that the planning complies with the policies outlined in ADS 580. Per ADS 580.2, the Administrator approves a waiver to fund a single conference with estimated costs in excess of \$500,000.

Office of Management and Budget (OMB) Circular M-17-08, which amends Circular M-12-12, states that each Department and Agency shall designate an appropriate official to approve estimated spending in excess of \$500,000 on a single conference, who shall note specifically that the expense is the most cost-effective option to achieve a compelling purpose. The designated Department/Agency official must document the basis for any such approval in writing. USAID must report conference expenses on our official website by January 31 of each year. The report must include any instances in which the net expenses for an Agency-sponsored conference exceeded \$500,000 and include a signed waiver from the Administrator that identifies the exceptional circumstances that necessitated exceeding this threshold.

## **RESOURCE IMPLICATIONS**

It is anticipated that if the conference is held in person, an estimate of 307 USAID employees will participate. The estimated direct cost for the proposed in-person event is \$789,515, excluding estimated salaries and benefits. The estimated cost per attendee is \$2,571. The estimated cost for the salaries and benefits of USAID employees is \$89,971.

If an in-person conference is not feasible, PPL will transition to a modified virtual conference. It is anticipated that an estimated 413 USAID employees will participate. The estimated direct cost for the proposed virtual event is \$298,900, excluding estimated salaries and benefits. The estimated cost per attendee is \$973. The estimated cost for the salaries and benefits of USAID employees is \$135,200.

The final number of participants will depend on whether the conference is virtual or in person. In-person attendance would be more limited due to budget and COVID-19 limitations, if any, while a virtual conference would be able to accommodate higher participation.

PPL will cover costs of the conference through Operating Expense funds. Missions will cover travel and per diem costs for participants coming from the field.

Attachments:

- Tab 1 - Estimated Budget for USAID-Sponsored Conference
- Tab 2 - Cost Detail and Cost-Comparison of Three Potential Sites
- Tab 3 - Attendance List (USAID Employees)



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## **ACTION MEMO FOR ADMINISTRATOR POWER**

Date: September 9, 2022

From: Atul Gawande, AA/GH /s/

Subject: Waiver and approval for the Fourth Annual Global Health Local Partner Meeting and President's Emergency Plan for AIDS Relief (PEPFAR) Country Operational Plan pre-Meeting (pre-COP23) from November 14-17, 2022

### **Recommendation**

That you sign the waiver to incur costs in excess of \$500,000 and approve the USAID Global Health Local Partner Meeting, to be held November 14-17, 2022 in Johannesburg, South Africa. The estimated total cost for this event is \$1,285,988 with a per attendee cost of \$2,338.16.

  
**Approve** September 27, 2022 \_\_\_ **Disapprove** \_\_\_

### **Background**

USAID seeks to host the Fourth Annual Global Health Local Partner Meeting in Johannesburg, South Africa, from November 14-17, 2022. The event will be a hybrid meeting with both in-person events and virtual sessions. The pre-COP23 Meeting, only for USAID staff, will also take place at the same time during afternoon sessions when Local Partners are participating in training or Community of Practice fora.

The Annual Local Partner Meeting is critical for supporting USAID's Agency Localization goals and further progressing toward the PEPFAR priority to shift 70 percent of direct funding to local partners. The meeting will provide an opportunity to hear directly from USAID/PEPFAR's 170 prime local nongovernmental organizations (NGO) and government partners. This year an additional 30 Local Partners supporting broader Global Health programs will also be invited to participate. Local Partners attending the event will have an opportunity to present their best practices in global health programming. The meeting will also provide a forum for peer-to-peer learning and technical and operational discussions of HIV and Health programming, as well as an opportunity for USAID leadership to hear directly from local partners on their successes and challenges working with USAID. The meeting has three high-level objectives:

- Objective #1: Ensure technical and operational excellence of USAID/Health programs implemented through local governmental and nongovernmental partners;

- Objective #2: Strengthen relationships between USAID and local partners through listening sessions and leadership engagement to elevate local voices as part of decision making;
- Objective #3: Strengthen communities of practice between local organizations to build networks and learning platforms.

This meeting has taken place the last three consecutive years. This will be the second time the meeting has taken place with an in-person option, as meetings held in 2020 and 2021 were held virtually due to the COVID-19 pandemic. A virtual option will be provided for all meeting participants. Returning to an in-person option is critical to support building relationships between local partners and USAID staff, as well as connections among local partners.

The pre-COP23 meeting serves as an opportunity for staff from the USAID Office of HIV/AIDS (OHA) and USAID PEPFAR country offices to learn together and exchange on USAID's priorities for Fiscal Year (FY) 2023 PEPFAR operational planning. Past meetings have featured plenary sessions on strategy as well as smaller group technical presentations.

The Bureau has entered the details regarding this event in the eConference Tracking and Approval System (eCTAS).

In accordance with Automated Directives System (ADS) Chapter 580, AA/GH Gawande certifies that the proposed conference costs are comprehensive and represent the greatest cost advantage to the U.S. government. The Bureau considered alternatives to a conference, including videoconferencing, but found that an in-person option was essential to achieve the outlined objectives particularly in regards to strengthening relationships and Communities of Practices for local partners. The size of the group of invitees, their locations, and the desired outcomes of the sessions mean that an in-person meeting would be most effective (in terms of both time and cost). In addition, the meeting must take place in advance of the December 2022 launch of the COP 2023 planning cycle, so USAID's staff, implementing partners, and external stakeholders may adequately plan and prepare for the COP's submission requirements in early 2023.

### **Authorities**

M Bureau finds that the planning complies with the policies outlined in ADS 580. Per ADS 580.2(a), the Administrator approves a waiver to fund a single conference with estimated costs in excess of \$500,000.

Office of Management and Budget (OMB) Circular M-17-08, which amends Circular M-12-12, states that each Department and Agency shall designate an appropriate official to approve estimated spending in excess of \$500,000 on a single conference, who shall note specifically that the expense is the most cost-effective option to achieve a compelling purpose. The designated Department/Agency official must document the basis for any such approval in writing. USAID must report conference expenses on our official website by January 31 of each year. The report must include any instances in which the net expenses for an Agency-sponsored conference exceeded \$500,000 and include a signed waiver from the Administrator that identifies the exceptional circumstances that necessitated exceeding this threshold.

## **Resource Implications**

An anticipated 550 people would participate—of whom 62 would be USAID U.S. direct-hire employees, 128 would be Foreign Service Nationals, 20 would be USAID-funded institutional support contractors, and 340 would be funded through an existing USAID contract.

The estimated direct cost for the proposed event would be \$1,285,988, excluding estimated salaries and benefits. The estimated cost per attendee would be \$2,338.16. The estimated cost for the salaries and benefits of USAID employees would be \$234,160. It is expected that 98 percent of the budget will be covered with PEPFAR program funds, and 2 percent of the budget will be covered by GH OE funds, to accommodate USAID FSO travel.

### Attachments:

- Tab 1—Estimated Budget for a USAID-Sponsored Conference
- Tab 2—Cost Detail and Cost-Comparison of Three Potential Sites
- Tab 3—Attendance List (USAID Direct Hire Employees)
- Tab 4—Mission Director's Clearance



FOR OFFICIAL USE ONLY

**ACTION MEMO FOR ADMINISTRATOR POWER**

**Date:** January 26, 2023 (updated February 22, 2023)  
**FROM:** Colleen R. Allen, AA/M /s/  
**SUBJECT:** Approval of a Worldwide Bureau for Management (M Bureau) Summit

**Recommendation:** That you approve a global summit for M Bureau Washington offices and backstops, proposed to take place at Bethesda North Marriott Hotel & Conference Center from May 1- 4, 2023, and a day at USAID facilities on May 5, at an estimated cost of \$1,620,000.

Approve  Disapprove \_\_\_\_\_  
2/23/2023

**BACKGROUND:**

The M Bureau requests approval for a worldwide M Bureau summit to take place in Washington, D.C., from May 1-5. The first and fourth day will be Bureau-wide workshops, with the two middle days focused on backstop/office breakout sessions, and a final day at USAID facilities for targeted discussions.

The summit will be called *Progress Beyond Programs: M Does Development* and will extend acute focus on four priorities: (1) Transforming our workforce, (2) Changing how we deliver assistance, (3) Addressing the most pressing challenges of our time, and (4) Being operationally ready. Each inflection point unfolding around the world requires close examination of what our development solutions provide and how we make that possible. The M Bureau is an important foundation for global response with approximately 500 U.S. direct-hires (USDHs) in Washington, 315 Foreign Service Officers (FSOs) in the M backstops (Controller, Contracting Officer, and Executive Officer [EXO]), 960<sup>1</sup> Foreign Service Nationals (FSNs) serving in these backstops, as well as hundreds of contractor (PSC and ISC) personnel.

As the first formal gathering for the M Bureau and aligned backstop staff in more than seven years, this summit will incorporate staff across all Washington functions and the Controller, Contracting Officer, and EXO backstops to come together in one place. Since the last global gathering in 2015, nearly half of the staff are new, many having joined amid the virtual environment necessitated by the pandemic. Resilience across the M Bureau and the Agency has been incredible in the virtual environment, and now is the time to catalyze that energy into purposeful in-person work sessions to propel us forward.

While the M Bureau has successfully kept the Agency fully operational and even exceeded some performance expectations during the virtual work environment, the inherent value of in-person meetings cannot be understated. M Bureau staff need the enriching

<sup>1</sup> Taken from Talent Analytics data for CCNs and FSNDH in Backstops 03, 04 and 93. Data was as of 12/31/2022.

collaborative and spontaneous discussions that can come from being in a shared environment. As expert advisors on Agency functionality, staff will use this event to share and learn from their collective experiences as development advisors and hone their knowledge for greater benefit to the global development community and the Agency. Colleagues will have a focused space to enhance communication and synchronization with our messages and goals aligning with the Administrator and the Administration and finding solutions to some of our most vexing operational challenges. For many, the conference will also be an opportunity for greater connection and building or solidifying relationships that may also bolster career and professional growth.

The M Bureau continues to enhance its specialized operational capabilities to enable the Agency to face global challenges, as well as implement the localization agenda. During this week, staff will assemble to cement how we work across the Agency to optimize our service delivery and strengthen oversight of Agency business operations.

Building on the work initiated from the M Bureau Senior Leadership Retreat in May 2022, staff will visit recent achievements, review the next set of recommendations to implement and conceive of ways to advance transforming the workforce, institutionalizing the Agency's localization efforts, contributing to USAID's Burden Reduction Program (BRP), advancing operational readiness, and lowering regulatory barriers for entities interested in partnership.

The conference will also offer the first opportunity for many new FSOs hired under the Career Candidate Corps program (C3) to convene with experienced FSOs, FSNs, Civil Servants, and Contractors, to develop the best approaches for how these backstops, as a definitive part of the M Bureau, contribute to your vision for inclusive development. The conference will harmonize the M Bureau identity while stimulating strategic thinking for strengthening our management operations workflow and leveraging our expertise with Missions, promoting FSN empowerment, and developing sound localization strategies.

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 summit is the first in a series of planned collaborative events that will strengthen our operational foundation. We determined that an in-person meeting would be the most-appropriate method of meeting the desired objectives, and the follow-on events will be hosted virtually. When planning individual summit sessions, we will seek to incorporate a virtual element when feasible to provide access to those who are not otherwise able to join in person.

The M Bureau requests a waiver to the single conference threshold of \$500,000. The Offices of Acquisition and Assistance, Management Services, and Chief Financial Officer, were separately planning for a conference for their workforce. While combining the three conferences into one M Bureau event causes the single conference dollar threshold to be exceeded, combining the three events results in better value for the cost and greater efficiency for planning and support. This approach also advances the Agency's diversity, equity, inclusion,

and accessibility goals, including key elements of FSN Commitment Implementation Plan, with planned participation from a wide range of overseas professionals. Specifically, the M Bureau is committed to including the same number of FSOs as FSNs from our missions overseas. Individually, the conference cost per backstop would be approximately \$518,050, which would amount to a total of \$1.554 million cost to the Agency, versus \$1.62M if the three backstops are combined. The M Bureau's three backstops are positioned together at missions and must work together as a high functioning team versus in silos. The slight additional cost of holding one event, 4% difference, is more than warranted. Combining the three conferences into one event is critical to strengthening the management platform for worldwide operations. Efficient management operations to support global program delivery relies on strong, integrated cross office, backstop collaboration, and reliable service provision. Sessions during the event will include how the backstops: 1) can tackle and progress on localization goals; 2) support the Agency's readiness posture across the globe; and, impact the entire development portfolio. The in-person sessions will share best practices and involve real time problem solving, building on lessons learned and finding ways to adopt them globally.

As market research, the M Bureau reviewed and compared costs for other recent Agency events. In reviewing the costs, the M Bureau noted that the Program Officers conference, held in October 2022, exceeded the threshold for a single event and had 300 participants. The M Bureau Summit would accommodate approximately 500 overseas participants, and about 100 domestic based participants, for about the same per person cost as the Program Officers conference. The M Bureau also considered the alternative of hosting an event overseas. However, the travel of Washington travelers, expected to be about 100, when added to the 500 overseas participants, increases both overall cost and greenhouse gas emissions and thus is not an option aligned to Agency priorities. The M Bureau also reviewed the conference reports and memorandums for similar conferences held by the State Department and Peace Corps. In those cases, the average cost per participant was \$5,904.51, when you total all conference costs (i.e. participant travel costs, lodging, and meals and incidental expenses, in addition to food, audio-visual and supplies, and venue expenses) for the State Department and Peace Corps events and divide it by the total estimated number of participants. The average cost per participant at the M Bureau's Global Summit will be \$2,700 which is over \$3,200 less per participant than the two similar other Federal organizations reviewed.

**AUTHORITIES:**

The M Bureau's Office of Management Services, which ensures for the entire Agency, that documentation is registered in the eConference Tracking and Approval System (eCTAS) received this Action Memorandum in January 2023 and found that the planning complies with the procedures outlined in Automated Directive Systems (ADS) 580.3.3.2 for USAID-Sponsored Conferences Not Pre-Approved.

ADS 580.2a establishes approval by the Administrator for conferences with a cost over \$500,000 to evidence the Administrator's waiver of the prohibition of any single conference with a cost over \$500,000 consistent with Office of Management and Budget Memorandum



M-12-12 *Promoting Efficient Spending to Support Agency Operations*. M-12-12 states “**Prohibit expenses in excess of \$500,000 on a single conference** -An agency shall not incur net expenses greater than \$500,000 from its own funds on a single conference, including conferences that are sponsored or hosted by the agency (or by other Federal or non-Federal entities). The agency head may provide a waiver from this policy if they determine that exceptional circumstances exist whereby spending in excess of \$500,000 on a single conference is the most cost-effective option to achieve a compelling purpose. The grounds for any such waiver must be documented in writing by the agency head.”

#### **RESOURCE IMPLICATIONS, ADMINISTRATIVE BURDEN, AND REPORTING REQUIREMENTS:**

The total estimated cost for the proposed event would be \$1,620,000 (excluding salaries).

An estimated 600 USAID staff would participate, including USDHs, Personal Service Contractors (PSCs), and FSNs. Missions will be responsible for funding travel for their staff. It is anticipated that 500 of USAID staff will travel from overseas with an average cost of \$2,870 per traveler. We anticipate 100 U.S.-based staff will participate in the event. There are no incremental costs for the U.S.-based staff participation.

Most meals will be provided at the conference venue; therefore for the duration of the conference, participants will have reduced M&IE for incidentals and dinner only for May 1-4 and full per diem for day on May 5. Worldwide travel costs are estimated at \$1,434,750. The estimated cost of the venue is \$163,750, which includes the food and beverage minimum, conference rooms, and additional facility charges for the event. Additionally, the M Bureau estimates spending \$21,500 for all other conference-related expenditures.

#### **Attachments:**

[Tab 1—Estimated Budget for USAID-Sponsored Conference](#) (note: too large to add to PDF)

[Tab 2—Cost Detail and Cost-Comparison of Three Potential Sites](#) (note: too large to add to PDF)

[Tab 3—Attendance List](#) (note: too large to add to PDF)

Tab 4—Notional Agenda - M Does Development




**USAID**  
FROM THE AMERICAN PEOPLE

**ACTION MEMORANDUM FOR ADMINISTRATOR SAMANTHA POWER**

**DATE:** February 3, 2023  
**FROM:** AA/GH – Dr. Atul Gawande  
**SUBJECT:** Waiver and Approval of the USAID Global Health Leaders’ Meeting (GHLM) in May 2023

**Recommendation:** That you sign the waiver to incur costs in excess of \$500,000 and approve the USAID GHLM to be held in Washington, D.C., from May 15 - 19, 2023.

Approve  \_\_\_\_\_ Disapprove \_\_\_\_\_  
03/14/23

**Background**

GH Bureau is organizing its biannual GHLM, scheduled for May 15 - 19, 2023, in Washington, D.C. The meeting will be an opportunity for the GH and Regional Bureaus to convene senior-level health staff from all field Missions, including Foreign Service Nationals. Participants will obtain updates on changes in Agency policy and priorities, notably the new Agency Policy Framework. They will discuss policies, trends, strategies, and processes relevant to health, as well as cross-sector approaches that affect health. Working relationships among Operating Units across regions will be strengthened, as well as ongoing communications between Missions and USAID/Washington. The meeting is essential to increase communication and enhance knowledge-sharing between USAID headquarters, field Missions, countries, and geographic regions. Participants will also have space and time for sharing and processing the events of the recent past that affect the emotional and mental health of staff.

GH anticipates sessions involving Agency and other Bureaus’ leadership. In addition to onsite participation, a small number of sessions will be streamed or recorded for later viewing by health staff in missions.

The proposed biannual GHLM is one aspect of GH’s strategic approach to workforce development. It replaced the “State of the Art” Conferences (SOTAs) and Health Managers’ Workshops (HMWs) that were held on alternate years at the regional level prior to 2019. This approach to engaging field staff continues to employ multiple methodologies to convey and discuss Agency priorities by employing learning strategies such as group dialog and discussions, knowledge-sharing, panel discussions, plenary and small group break-out sessions, and peer-led activities. The first GHLM was held in 2019 at the Washington Learning Center. In 2021 it was held virtually in response to COVID-19 travel and safety restrictions. GH believes returning to an in-person meeting in 2023 is especially warranted after the challenges of the past few years due to the pandemic.

In accordance with Automated Directives System (ADS) Chapter 580, the proposed meeting costs are comprehensive and represent the greatest cost advantage to the U.S.

government. Details regarding this event have been entered in the eConference Tracking and Approval System (eCTAS).

### **Authorities**

M Bureau finds that the planning complies with the policies outlined in ADS 580. Per ADS 580.2, the Administrator approves a waiver to fund a single conference with estimated costs in excess of \$500,000.

Office of Management and Budget (OMB) Circular M-17-08, which amends Circular M-12-12, states that each Department and Agency shall designate an appropriate official to approve estimated spending in excess of \$500,000 on a single conference, who shall note specifically that the expense is the most cost-effective option to achieve a compelling purpose. The designated Department/Agency official must document the basis for any such approval in writing. USAID must report conference expenses on our official website by January 31 of each year. The report must include any instances in which the net expenses for an Agency-sponsored conference exceeded \$500,000 and include a signed waiver from the Administrator that identifies the exceptional circumstances that necessitated exceeding this threshold.

### **Resource Implications**

It is anticipated that 185 USAID employees will participate, which includes 135 coming from USAID field Missions and 50 from Washington. The estimated direct cost for the proposed event is \$697,333, excluding estimated salaries and benefits. The estimated cost per attendee is \$3,769. The estimated cost for the salaries and benefits of USAID employees is \$289,160. Costs will be covered by a mixture of program and operating expense funds.

The conference will be paid for by the GH Bureau, with potential contributions from the regional Bureaus.

### **Attachments:**

Tab 1 – Estimated Budget

Tab 2 – Cost Detail

Tab 3 – Attendance List (USAID Employees)