



**Functional Series [500](#)
Management Services**

INTERIM UPDATE 08-07

SUBJECT: Approval of Conference Attendance, Updated Policy

NEW MATERIAL: This notice conveys current requirements and supersedes all previously issued guidance on conference policy, including ADS chapter 522.5.16 and Handbook 23. ADS Chapter 522 is currently undergoing revision to include this information, and Handbook 23 will be cancelled.

EFFECTIVE DATE: 05/29/2008

ATTACHMENT: [Report Template](#)

This message was sent out 05/30/2008 as an Executive Message.
This Notice is being posted to the Intranet for record purposes.

POLICY

USAID/General Notice
A/AID
05/29/2008

E X E C U T I V E M E S S A G E

Subject: Approval of Conference Attendance, Updated Policy

In April 2005, the Agency implemented a policy governing attendance by USAID employees at conferences. Due to budgetary constraints, attendance at conferences by more than three staff members required prior approval by the Chief of Staff. This notice conveys current requirements and supersedes all previously issued guidance on conference policy, including ADS chapter 522.5.16 and Handbook 23. ADS Chapter 522 is currently undergoing revision to include this information, and Handbook 23 will be cancelled.

The term "conference" is defined as any seminar, meeting, retreat, workshop, training activity, or similar event that is funded with USAID OE and/or program funds, or by any external organization/partner. This includes conferences that USAID implementing partners administer using USAID program funds. Bureaus/Independent Offices sponsoring a conference, whether in Washington or overseas, must exercise strict fiscal discipline in the selection of a conference site. A comparison of the cost of at least three locations must be made, and justification provided if the lowest cost site is not selected.

For all conferences that are to be attended by three or more USAID employees, prior approval of the Deputy Administrator is required. This approval is sought through submission of quarterly reports from the Assistant Administrators/Independent Office Directors. These reports should be submitted through the Chief Operating Officer for approval by the Deputy Administrator, and should contain the following information, using the attached template:

- Bureau/Independent Office Name
- Conference Name
- Date(s) of Proposed Conference
- Whether it is USAID Sponsored
- Purpose
- Location
- Total Conference Cost (Program or OE)
- Number of Staff Attending
- Whether these Staff Members are in USAID/W or the Field

Also, the same procedure applies for conferences that are hosted and funded by USAID, and where 20 or more USAID personnel are expected to attend. This is to mitigate the risk of organizing a large event, and then having a substantial number of those invited denied permission to attend because the front office does not agree with the decision to hold the event. Approval/disapproval decisions will be made within five days of the receipt of the report to allow for further discussion, if necessary. Approval decisions will be based on availability of funding, as well as how the conference furthers the mission and priorities of the Agency.

Reports must be accompanied by an action memo certifying that strict fiscal responsibility has been exercised in the selection of the conference site. Justifications must be provided for other than the lowest cost conference site.

During the course of the year, between quarterly reports, if an opportunity to host or attend a conference arises, prior approval of the Deputy Administrator is still required. In these instances, an action memo from the appropriate Assistant Administrator/Independent Office Director requesting approval for attendance at the conference should be addressed to the Deputy Administrator, through the Chief Operating Officer, and include the same information that is requested in the quarterly report.

Henrietta H. Fore

Attachment: Quarterly Conference Report Template

Point of Contact: Any questions concerning this Notice may be directed to Deborah Lewis, A/AID/COO/M, 712-0936.

File Name	IU5_0807_060208
Notice Date	05/30/2008
Effective Date	05/30/2008
Editorial Revision Date	
ADS CD No.	N/A
Remarks	This IU will remain active until the policy and procedure in it are incorporated into ADS 522.