



USAID
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Sample Conference Approval Package

An Additional Help for ADS Chapter 580

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SAMPLE APPROVAL PACKAGE – FOR ILLUSTRATION PURPOSES ONLY

ACTION MEMORANDUM FOR THE DEPUTY ADMINISTRATOR

FROM: DC/AA, John Doe (*Signature of Bureau AA or IO Director Required*)

SUBJECT: Approval of 2nd Annual Foreign Assistance Conference

Recommendation

That you approve the 2nd Annual Foreign Assistance Conference to be held in Bangkok, Thailand from December 1-8, 2015.

Approve _____ Disapprove _____

Background

Having a better understanding of future trends in foreign assistance such as those in population, migration, urbanization, food scarcity, and natural resources constraints will improve the impact, sustainability and resilience of today's development investments. This foreign assistance conference is an outgrowth of USAID's 2013 conference on Development Challenges which drew attention to emerging global trends.

The Foreign Assistance Conference will allow the Agency and our partners to get ahead of the development curve by focusing on challenges sweeping across the underdeveloped world today: climate change and population growth. Both trends are likely to accelerate dramatically. The conference brings together USAID Missions, NGOs, the private sector, scientists, and city government leaders to exchange the latest knowledge and approaches. We are structuring the conference to catalyze fresh lines of cooperation that spawn a round of innovative pilot projects and other *science-to-action* efforts.

A total of 120 participants attended the 2014 Foreign Assistance Conference held in Pretoria, South Africa, from November 3-8, 2014, at a total direct cost of \$198,300, with a per person cost of \$1,652.50.

In accordance with ADS Chapter 580, I certify that the proposed conference costs are comprehensive and represent the greatest cost advantage to the US Government. Alternatives to a conference were considered, including videoconferencing, but were not considered feasible to achieve the conference goals. The capability of virtual attendance for certain sessions will be available to participants not able to attend the event. Details regarding this event have been entered in the eConference Tracking and Approval System.

Resource Implications

It is anticipated that 105 people will participate, 20 USAID employees (*5 Washington based employees and 15 field employees*), 5 USAID-funded institutional contractors, and 80 other attendees whose funding will be covered by their sponsoring organizations. The estimated direct cost for the proposed event is \$197,000, excluding salaries. The estimated direct cost per attendee is \$1,781. The estimated cost for the salaries of USAID employees is \$32,928.

Attachments

Tab 1 – Estimated Budget

Tab 2 – Cost Detail and Cost Comparison of Three Potential Sites

Tab 3 – Attendance List (USAID Employees)

Tab 4 – Mission Director's Clearance

CLEARANCE PAGE FOR THE FOREIGN ASSISTANCE CONFERENCE, DECEMBER 1-8, 2015

CLEARANCES

Bureau/Office: Name	_____	Date: _____
Bureau/Office: Name	_____	Date: _____
Bureau/Office: Name, Primary POC for Conferences	_____	Date: _____
USAID/Mission: Mission Director*	_____	Date: _____
AA/M: **	_____	Date: _____

Drafter: [Name, Position Title, Office, Telephone Extension, Date]

[Bureau or Independent Office] Primary POC for Conferences: [Name, Telephone Extension]

Note: The Assistant Administrator for Management must approve events with estimated direct costs (excluding salary) of \$100,000 or below. The Deputy Administrator must approve events with estimated direct costs (excluding salary) of over \$100,000 up to \$500,000. The Administrator must sign a waiver to incur costs in excess of \$500,000 on a single conference. The action memo should be addressed to the designated approving official based on the cost threshold.

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

***[DO NOT DELETE] AA/M clearance is required for events over \$100,000. The following footnote should be included when AA/M clearance is required:*

The Management Bureau has reviewed the information and finds that the planning of the event complies with the conference policies and procedures.

Tab 1 – Estimated Budget

Estimated Budget for USAID-Sponsored Conferences	
Budget Item	Dollar Estimate
Estimated Salary*	32,928
Travel & Per Diem Costs ** [This includes airfare, lodging, and per diem for USAID employees.]	150,000
Conference Venue	30,000
Meals***/Refreshments [Note: If meals are provided, reduce the total estimate for per diem costs accordingly.]	10,000
Facilitators [Include level of effort, travel, and per diem. Organizers should shift to internal facilitators where possible.]	--
Audiovisual and Other Equipment Usage	1,000
Computer and Telephone Access Fees	4,000
Printing - Go Green, where appropriate and feasible.	2,000
Other [e.g. cost for speakers, host government officials and other participating foreign dignitaries, including invitational travel costs, shuttle service]	--
TOTAL (Excluding Salaries)	197,000

*** eCTAS automatically calculates the salary estimate.** The following rates are used:

- USDH and PSC employees: \$49/hour or \$392/day
- FSN employees: \$22/hour or \$176/day

**** Contact USAID’s contracted travel agents to obtain a flight estimate. Do not use a discount travel site for flight estimates (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 M&IE) + 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 be conducted during the meals.

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; and
4. Developmental benefits will be derived from the employee's attendance.
5. The provision of meals is necessary for the employee to obtain the full benefit of the training.

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

(Signature of Conference Organizer Required)
John Doe, Conference Organizer

Tab 2 – Cost Detail and Cost Comparison of Three Potential Sites

Consideration was given to holding the conference in Washington, DC and Kathmandu, Nepal. Holding the conference in Bangkok will allow for a cost savings of over \$10,000. Bangkok is easily accessible and had a selection of hotels that could accommodate the group that all fell within the per diem rate and had the Regional Security Officer's approval.

The bureau considered government facilities and sought quotes from three potential hotels. There are two potential government owned spaces large enough for the conference, the U.S. Embassy multi-purpose room and a mission training room. However neither space is suitable for this particular situation. The multi-purpose room is difficult to book for the required timeframe as it is used by the entire Embassy and as the primary meeting venue when non-USG/offsite visitors come in. In addition, the layout of the room is not conducive to an interactive meeting and breakout sessions. The mission training room is currently being used as temporary office space during a space re-blocking exercise. Since no government facility was available, quotes were obtained from three potential hotels in Bangkok:

Great Rift Valley Lodge	\$40,000
Marriott	\$46,000
Pyramid Inn	\$50,000

Based on this cost comparison, the Great Rift Valley Lodge is the most advantageous site to the U.S. Government (USG). The Great Rift Valley Lodge has adequate lodging rooms, conference space, and is able to offer a variety of meals that all fall within the per diem rate.

Tab 3 – Attendance List (USAID Employees)

FOREIGN ASSISTANCE CONFERENCE			
	USAID Employee	Office Acronym, Location	Justification
1	Nicholas Webber	USAID/W Program Officer	Integral for strategy discussions and implementation plans for FY 14.
2	Mark Jones	USAID/W Office Director	Key role in discussion of implementation plans for USAID/W office.
3	James Carver	USAID/W Technical Advisor	Key in providing technical expertise in food security
4	Melody Nichols	USAID/W Program Officer	Integral for discussions regarding country strategy
5	Dineen Taylor	USAID Thailand	Technical Advisor Key in providing technical expertise in health
6	James Doley	USAID Thailand	Senior Advisor Key role in advising on policy issues
7	Jamie Atkins	USAID Thailand	Evaluation Specialist Key role in providing monitoring and evaluation input
8	Suri Sherbenou	USAID Cambodia	Water Advisor Provide technical advice on water issues.
9	Abdel Hamu	USAID Cambodia	Policy Advisor Key role in providing advice on interagency policy
10	Laura Grimes	USAID Bangladesh	DRR Policy Advisor Critical in providing DRR policy advice
11	Ravi Taylor	USAID Viet Nam	Technical Advisor Critical for technical discussion on family planning
12	Eilleen Simmons	USAID Viet Nam	Program Manager Key role in discussions regarding country strategy
13	Issa Bigo	USAID Pakistan	Technical Advisor Critical for technical discussion on family planning
14	Jamie Mosher	USAID Pakistan	Technical Advisor Critical for technical discussion on health issues
15	Jessica Wolf	USAID Bangladesh	Program Officer Key role in country strategy discussion
16	Carla Christen	USAID Afghanistan	Project Development Critical for discussions on program directions
17	Omar Mabarek	USAID Sri Lanka	Technical Advisor Providing technical expertise in agriculture
18	Dina Tupa	USAID Sri Lanka	Policy Advisor Providing policy advice on Federal policy requirements
19	Jason Chau	USAID India	Policy Advisor Key role in overall USG policy discussion
20	Carolyn Andren	USAID Pakistan	Technical Advisor Critical for technical discussions on water issues

Tab 4 – Mission Director’s Clearance

Please find attached an email from the Bangkok Mission Director providing clearance to hold the Foreign Assistance Conference in Bangkok from December 1-8, 2014.