

Templates for Action Memoranda on

Attendance at Multilateral Conferences

A Mandatory Reference for ADS Chapter 580

Partial Revision Date: 08/19/2020

Responsible Office: PPL/DC

File Name: 580mac\_081920

**Notes for Drafters:**

1. There are two types of Action Memoranda for requesting approval of attendance at multilateral conferences, as listed below:
   * A single event; and
   * Multiple events in a month (monthly bundle):
     1. Bureaus and Independent Offices (B/IOs) must include all known events for the month.

Please use the correct template for your submission.

An Action Memorandum for either a Single Event or Monthly Bundle Event also requires the submission of the [Google Sheets Template](https://docs.google.com/spreadsheets/d/1I2TsNrjS2o41fPHitHXQYif8JDa0AJdoolZH13p0dm4/edit#gid=1982442201).

1. The Bureau for Policy, Planning, and Learning, Office of Development Cooperation (PPL/DC) clears all multilateral requests prior to submitting them to the Assistant to the Administrator for PPL, and must receive all Action Memoranda at least 30 days prior to the event’s (or the first event’s, if a monthly bundle) start date. If a B/IO submits an Action Memorandum less than 30 days prior to the start date, it must provide an explanation for the delay in the Background Section of the Memorandum.
2. At least 14 days prior to the start of conferences that require accreditation from the U.S. Department of State (State), B/IOs must submit requests to State’s Bureau of International Organization Affairs for approval, to [IO-C-Program@state.gov](mailto:IO-C-Program@state.gov). Refer to Automated Directive System (ADS) Chapter [580.3.2.3](https://www.usaid.gov/sites/default/files/documents/1868/580.pdf) for more information.
3. If Program funds will pay for all or part of a trip for an employee to attend a multilateral conference, the B/IO must copy the Office for Budget and Resource Management (BRM) on the Action Memorandum at [BRMTaskerList@usaid.gov](mailto:BRMTaskerList@usaid.gov). The B/IO is responsible for providing the info copy to BRM.
4. Please include in both the Background Section of the Action Memorandum and the [Google Sheets Template](https://docs.google.com/spreadsheets/d/1I2TsNrjS2o41fPHitHXQYif8JDa0AJdoolZH13p0dm4/edit#gid=1982442201) (under Total Direct Cost) any business-class waivers obtained.
5. B/IOs must enter conferences sponsored by multilateral organizations in the eConference Tracking and Approval System (eCTAS) as an externally sponsored event when five or more employees are in travel status to attend, **or** direct costs exceed $100,000:
   * B/IOs must enter multilateral conferences co-sponsored by USAID in eCTAS as a USAID-sponsored event when ten or more employees are in travel status to attend, **or** direct costs exceed $100,000. Use the template for USAID-Sponsored Conferences (ADS Chapter 580mab).
   * For all other multilateral conferences, B/IOs should not enter the information in eCTAS, but ensure all relevant information appears in the Action Memorandum and [Google Sheets Template](https://docs.google.com/spreadsheets/d/1I2TsNrjS2o41fPHitHXQYif8JDa0AJdoolZH13p0dm4/edit#gid=1982442201).



**TEMPLATE FOR AN ACTION MEMORANDUM ON ATTENDANCE AT A MULTILATERAL CONFERENCE**

**FOR A SINGLE EVENT**

**Date: [Date]**

**To: Assistant to the Administrator for the Bureau for Policy, Planning, and Learning [Full Name]**

**From:** AA/**[Bureau or Independent Office (B/IO) Acronym]**—**[Full Name]**

**Subject:**  Participation in **[Title of Conference/Meeting], [Date[s]]**

**Recommendation: [For One Event with One Participant]**

That you approve **[Name of Attendee],** **[Title]**, **[Bureau/Independent Office (B/IO)]** to attend the **[Title of Conference/Meeting]**, which would take place in **[City, Country OR City, State]** on **[Date(s)]**.

Approve\_\_\_\_\_\_\_\_\_\_\_\_ Disapprove\_\_\_\_\_\_\_\_\_\_\_\_\_\_

OR

**Recommendation: [For One Event with Multiple Participants]**

That you approve **[B/IO]** staffto attend the **[Title of Conference/Meeting]**, which would take place in **[City, County OR City, State]** on **[Date(s)]**.

Approve\_\_\_\_\_\_\_\_\_\_\_\_ Disapprove\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Background**

[State why USAID is participating and provide any additional information.]

[State if the B/IO obtained any business-class waivers.]

[Refer to attachments in a one-sentence summary in this section. Use Tabs for two or more attachments; mention a single attachment by the name of the document, not as “Tab 1.”]

**Authorities**

[Automated Directives System (ADS) Chapter 580, Conference Planning and Attendance](http://www.usaid.gov/ads/policy/500/580), requires your approval for USAID employees to attend meetings of multilateral organizations. *PPL/DC will state whether or not the request is in compliance with the policy.*] The Bureau for Policy, Planning, and Learning, Office of Development Cooperation (PPL/DC)received this Action Memorandum on [*Date*] and finds that the planning [*complies/does not comply*] with the procedures outlined in ADS Chapter 580.3.2.3, Multilateral Conferences.  [*PPL/DC will state the reason if the request is not in compliance.*]

**Resource Implications**

The total estimated cost for the proposed conference travel would be **$X,** including travel and *per diem*, of which **$Y** would be Operating Expense (OE) funds, and **$Z** would be Program funds.

Attachment:

Multilateral Travel Request and Participant List [[*Google Sheet Template*](https://docs.google.com/spreadsheets/d/1I2TsNrjS2o41fPHitHXQYif8JDa0AJdoolZH13p0dm4/edit#gid=1982442201) *for*

*Multilateral Conferences - Provide Date Range*]



**TEMPLATE FOR AN ACTION MEMORANDUM ON ATTENDANCE AT MULTIPLE MULTILATERAL CONFERENCES (MONTHLY BUNDLE)**

**Date: [Date]**

**To: Assistant to the Administrator for the Bureau for Policy, Planning, and Learning [Full Name]**

**From:** AA/**[Bureau or Independent Office (B/IO) Acronym]**—**[Full Name]**

**Subject:**  Participation in **[Title of Conference/Meeting], [Date[s]]**

**Recommendation:**

That you approve the participation of **[B/IO]** staff to attend the multilateral meetings indicated below.

Approve\_\_\_\_\_\_\_\_\_\_\_\_ Disapprove\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Background**

The **[B/IO]** would like to send staff to the following event(s) in the month of **[X]**:

1. **[Month Day-Day, Year]** (*i.e.,* February 19–21, 2019): Hosting Organization **X**; International Conference **X**; Country location; Number of U.S. Direct-Hire or Non-Direct-Hire participants; estimated total cost of **$X**. [State if the B/IO obtained any business-class waivers.]

[Refer to attachments in a one-sentence summary in this section. Use Tabs for two or more attachments; mention a single attachment by the name of the document, not as “Tab 1.”]

**Authorities**

Automated Directives System (ADS) Chapter 580, Conference Planning and Attendance, requires your approval for USAID employees to attend meetings of multilateral organizations. [*PPL/DC will state whether or not the request is in compliance with the policy.*] The Bureau for Policy, Planning, and Learning, Office of Development Cooperation (PPL/DC)received this Action Memorandum on [*Date*] and finds that the planning [*complies/does not comply*] with the procedures outlined in ADS Chapter 580.3.2.3, Multilateral Conferences.  [*PPL/DC will state the reason if the request is not in compliance.*]

**Resource Implications**

The total estimated cost for the proposed conference travel would be **$X,** including travel and *per diem*, of which **$Y** would be Operating Expense (OE) funds, and **$Z** would be Program funds.

Attachment:

Multilateral Travel Request and Participant List [[*Google Sheets Template*](https://docs.google.com/spreadsheets/d/1I2TsNrjS2o41fPHitHXQYif8JDa0AJdoolZH13p0dm4/edit#gid=1982442201) *for*

*Multilateral Conferences - Provide Date Range*]

**Drafter**: [B/IO/Title]:[Name]:[Phone extension];[After Hours Phone No.]

**Approved**: [B/IO/Title]:[JDoe]

**Bureau Level Clearances Clearance Status Date**

[B/IO/Title]:[JDoe] Clear/Info MM/DD/YY