Conference Approval Memorandum Template
USAID Sponsored Conferences

A Mandatory Reference for ADS Chapter 580

ACTION MEMORANDUM FOR THE ADMINISTRATOR or
ACTION MEMORANDUM FOR THE DEPUTY ADMINISTRATOR or
<mark>**ACTION MEMORANDUM FOR THE ASSOCIATE ADMINISTRATOR FOR MANAGEMENT**</mark>

FROM: [Assistant Administrator (AA) or Independent Office Director] – [Name]

SUBJECT: Approval of the [Name of Event, Date of Event]

Recommendation

That you approve the [**Name of Event**] to be held in [**Location of Event**] from [**Date of Event**]. [*The <mark>Bureau for Management recommends that the conference</mark> organizer submit the conference memo 120 days prior to <mark>the start date of the event</mark>. USAID-sponsored conferences must be submitted no later than 30 days prior to the <mark>start date of the event</mark>.]*

          Approve _____   Disapprove _____

Background

<mark>The [**Name of Event**] will be held in [**Location of Event**] from [**Date of Event**].</mark>

[*Include the following information*:]

- **Purpose and Expected Outcomes***:* State why the conference is essential and what should be achieved such as:
  - Enhance knowledge sharing and understanding of program approaches and activities across countries and regions.
  - Train new staff on operations in developing environments.
  - Review monitoring and evaluation. Identify and share lessons learned from past and current programs, including lessons learned from programs that are changing.
  - Examine USAID's role in the larger context of foreign assistance.
- **Previous Conference**: Indicate if the conference has been held previously. If so, include the total and per person cost of the previous conference, total number of days, location, and total number of participants.

[***Mandatory section: Edit to reflect your conference approval request***.] 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. Alternatives to a conference were considered, including videoconferencing. [***Explain why alternatives were not feasible***.] Details regarding this event have been entered in the eConference Tracking and Approval System (eCTAS).

Resource Implications
[*Mandatory content must include*:] It is anticipated that [**Total Number of Participants**] people will participate – [**Total Number of**] USAID employees (*e.g., USDH, PSC, FSN, Detailee*), [**Total Number of**] USAID-funded institutional contractors, and [**Total Number of**] other attendees whose funding will be covered by their sponsoring organizations. The estimated direct cost for the proposed event is [$XXX,XXX], excluding salaries. The estimated cost per attendee is [$X,XXX]. The estimated cost for the salaries of USAID employees is [$XX,XXX].

[*Use the eCTAS automatic calculation to determine the estimated cost for the event and for USAID employee salaries. Formula for estimated cost per attendee: Direct cost divided by the total number of participants*)].

Attachments
> Tab 1 – Estimated Budget [Mandatory]
> Tab 2 – Cost Detail and Cost Comparison of Three Potential Sites [Mandatory]
> Tab 3 – Attendance List (USAID Employees) [Mandatory]
> Tab 4 – Mission Director's Clearance [Mandatory if held in the field]
> Tab 5 – Additional Background Information [Optional]

CLEARANCE PAGE FOR [NAME OF EVENT, DATE OF EVENT]

CLEARANCES
Bureau/Office: Name   _____   Date: _____
Bureau/Office: Name   _____   Date: _____
USAID/Mission: Mission Director*   _____   Date: _____
AA/M: ACrumbly**   _____   Date: _____

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

Note: The Associate Administrator for Management (AA/M) must approve events with 20 or more USAID employees in attendance and estimated direct costs (excluding salary) of $100,000 or less. The Deputy Administrator must approve events with estimated direct costs (excluding salary) greater than $100,000 up to $500,000. The Administrator must sign a waiver to incur costs in excess of $500,000 on a single conference. In this case, the action memo should be addressed to the Administrator.

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] M/AA clearance is only required for events with estimated direct costs (excluding salary) greater than $100,000. The following footnote should be provided when AA/M clearance is required.*

**[DO NOT DELETE] 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*	
Travel & Per Diem Costs ** [This includes airfare, lodging, and per diem for USAID employees.]	
Conference Venue	
Meals***/Refreshments [Note: If meals are provided, reduce the total estimate for per diem costs accordingly.]	
Facilitators [Include level of effort, travel, and per diem. Organizers should shift to internal facilitators where possible.]	
Audiovisual and Other Equipment Usage	
Computer and Telephone Access Fees	
Printing - Go Green, where appropriate and feasible.	
Other [e.g. cost for speakers, host government officials and other participating foreign dignitaries, including invitational travel costs, shuttle service]	
TOTAL (Excluding Salaries)	

* eCTAS automatically calculates the salary estimate. The following rates are used:
o USDH and PSC employees: $49/hour or $392/day
o 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.

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

Conference Organizer

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

[Conference Venue] Provide information of the three quotes obtained for the conference venue. Government facilities must be seriously considered, if available at a cheaper rate than a commercial facility. Consider moving the date of the conference to accommodate availability.

Information about the three quotes are not required if a suitable government facility is available at no cost. If a government facility will not be used, provide a justification (e.g. venue size, capabilities, security, among others.).

[Location] Provide an explanation of how your choice of the geographic location reduced the costs of the conference—taking into consideration venue costs and travel costs for USAID employees and other participants, among others.

Additionally, provide information of any cost savings activity.

Tab 3 – Attendance List (USAID Employees)

[Note if the participant list is incomplete or unconfirmed, provide a breakout estimate of the number of USAID employee participants by bureau, office, and mission.]

	USAID Employee (Full Name, Title)	Office Acronym, Location	Justification
	[EVENT NAME]		
1	*Ex: John Doe, Program Specialist*	*M/MPBP, Headquarters*	*Compelling reason why attendance is needed.*
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Tab 4 – Mission Director's Clearance (if conference being held in the field)

[Attach the email or letter from the Mission Director providing his/her approval if the conference will be held in the field.]

Tab 5 – Additional Background Information

Additional background information is not mandatory unless specifically requested by the approving official. The sponsoring bureau/independent office may provide any additional information that the approving officer should consider, such as a sample agenda for the conference, the conference web site, or any other background information.

[Discuss Cost/Expense Details under Tab 3]

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