Conference Policy Frequently Asked Questions

An Additional Help for ADS Chapter 580

FREQUENTLY ASKED QUESTIONS
Conference Planning and Attendance

GENERAL QUESTIONS

1. **Who do I contact if I have questions about the conference policy?**

   Each Bureau and Independent Office has a designated Primary Point of Contact (POC) for Conferences. To obtain the name of your POC, please send a request to the Bureau for Management's Conference Management Team, **eConference@usaid.gov**.

2. **Where do I submit a request to attend an external conference or to sponsor an internal conference?**

   Conference requests are entered in the **eConference Tracking and Approval System (eCTAS)**.

3. **Do I need a user name and password for eCTAS?**

   You can access eCTAS with your network user name and password.

4. **What is the definition of a conference?**

   A conference is defined as a seminar, meeting, retreat, symposium, workshop, training activity or other such event that involves temporary duty travel by employees.

5. **How is the term "USAID employee" defined?**

   For the purposes of the conference policy, a USAID employee is defined as a direct-hire, personal services contractor (PSC), Foreign Service National (FSN), Third Country National (TCN) and individual detailed to USAID from another government agency.
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6. **Does the conference approval process apply to all training activities?**

   No. The following training events are excluded from the reporting and approval process:

   - Instructor-led training included in the USAID University course inventory that requires participant registration through the Learning Management System. This exception does not include annual or biannual workshops for USAID backstops or events that are held for the purpose of sharing best practices, exchanging ideas, distilling lessons learned, networking, or stocktaking around Agency programs, operations or reforms, if they otherwise meet the criteria for approval outlined in **ADS 580, Conference Planning and Attendance**.

   - Events funded and scheduled by the Office of Human Resources.

- Regularly scheduled instructor-led courses conducted at a U.S. Government or commercial training facility.

7. Who is the approving official for internal and external conferences?

The **Deputy Administrator** approves expenditures for internal and external conferences with estimated costs greater than $100,000 up to $500,000. The **Assistant Administrator for Management (AA/M)** approves expenditures for internal and external conferences with estimated costs of $100,000 or less. The **Administrator** must approve a waiver to fund a single conference with estimated costs in excess of $500,000 when it is determined to be the most cost-effective option to achieve a compelling purpose.

USAID-SPONSORED CONFERENCES

8. Do all USAID-sponsored conferences require approval?

No. The conference is exempt from the approval process if no USAID employees are required to travel to attend the event. Where travel is involved, approval is required for a conference that 20 or more USAID employees are expected to attend and conferences with estimated expenditures of $100,000 or more regardless of the number of attendees. Grant funding is also exempt from the approval process and should not be included in determining the dollar threshold (see **ADS 580sac, Conference Approval Requirements Matrix**).

9. We plan to convene a 3-day staff retreat with approximately 25 USAID staff, 2 of whom would travel on TDY to attend. We plan to use USAID space at no cost. Our only expenses are employee travel costs and light refreshments. Does this type of meeting fit under the "Mission" exception?

Yes, the exception applies. The exception would not apply if conference related expenses, such as a venue or meals, were incurred.

10. What is the process for approval to hold a USAID-funded conference?

The Bureau/Independent Office (B/IO) must enter a request in the eCTAS and upload the required supporting documentation in the system. The point of contact listed in the system will receive an acknowledgement e-mail when the request is entered and another email providing the approving official's decision. The Conference Management Team or the Office of the Executive Secretary may request additional information.

10. Who is responsible for requesting approval for a conference that is hosted by a Mission, but funded by a USAID/W bureau or office?

The bureau or independent office funding the conference must request approval. For example, the Management Bureau would request approval if the bureau plans to host a

conference in Lima where 20 or more USAID employees will attend or the cost will exceed $100,000.

11. When should I submit a request to sponsor a conference?

The conference coordinator must obtain approval before commitments are made or costs incurred. Ideally, the approval package should be submitted at least 120 days prior to the start date. Approval must be requested at least 30 days prior to the start date.

12. Is approval required if an implementing partner is funding a conference under a grant or cooperative agreement?

No. A conference funded from grant or cooperative agreement is exempt from the approval process. However, where travel is involved, approval is required for the use of non-grant funds (e.g. for travel and per diem of employees) if 20 or more employees will attend or non-grant funding exceeds $100,000.

13. Is approval required for the Mission to hold an all-hands meeting or retreat at the Mission Director's residence?

The policy does not apply to meetings among USAID staff where no temporary duty travel (50 miles or more from the mission) is involved.

14. Is approval required to hold routine meetings throughout the year with implementing partners? USAID participation may range from 15 to 40 employees, and the locations will be Washington-based for most and field-based for a few.

To determine whether or not the meeting is exempt from the approval process, begin with evaluating the basic approval threshold for routine meetings with partners, i.e. fewer than 20 employees are attending and the cost is under $100,000. Another type of exemption is when employees do not have to travel. If employees will not be in TDY status to attend the meeting, then the meeting is exempt from the approval process. Another type of exemption is the "mission" exception. Under this exception, the purpose of travel is to attend meetings to discuss USAID programs and operations or to perform operational or managerial activities. To qualify under the 'mission' exception, travel and light refreshments must be the only direct costs associated with the event.

15. More than 20 employees from our Bureau will be traveling to meet with an implementing partner several times this year to review progress on a USAID-funded initiative. In addition to funding employee travel, Agency funds will pay for the venue, AV equipment, lunch & coffee breaks. Is the meeting exempt from the conference approval process?

No, the meeting is considered a USAID-sponsored event and requires approval. Please see ADS 580 for guidelines on USAID-sponsored conferences and enter the information in eCTAS.

16. The policy states that when considering venues, a Government venue must be considered. Does this apply to host governments or is it specific to U.S. Government venues?

The policy is specific to U.S. Government venues that may be available at no charge or for a fee as is the case for some U.S. Government event and meeting spaces. USAID's Washington Training Center or other USAID facilities should be the venue of first choice when feasible.

17. Should I include the salary costs for employees when calculating the direct costs for a USAID-sponsored conference?

The salary is not included in the direct cost of the conference. However, it is included in the approval memo and in the budget template. The approving official will consider both the direct cost and indirect cost (salary) in making a decision regarding the cost-effectiveness of the conference.

18. Do I need to provide information on the number of USAID-funded institutional contractors attending a USAID-sponsored conference?

Yes. The number of institutional contractors attending the conference must be provided in eCTAS and in the action memorandum.

19. How are participants notified that they are approved to attend a USAID-funded conference?

The conference coordinator will notify participants when the event is approved.

20. Are participants required to enter a request in eCTAS to attend a USAID-funded conference?

No. Participants are not required to enter a request in eCTAS to attend a USAID-sponsored conference. The Conference Coordinator informs participants.

21. We have a Participating Agency Program Agreement (PAPA) with another federal agency funded with USAID program funds. The conference will be partially funded through the PAPA agreement. Does the contribution count toward the $100,000 threshold?

Yes. The policy is applicable to events funded with USAID funds, including those hosted by partners and contributions from interagency agreements funded by USAID.

22. Should the conference budget for a USAID-sponsored conference include the full contract cost for a facilitator who is providing services for several events?

No. The budget should only include the cost attributable to the specific event.

23. **A list of participants must be provided for a USAID-sponsored conference. What should I do if I need approval to secure the venue before the participant list is finalized?**

When approval for a venue is required before finalizing the participant list, please submit the conference approval memo early with an estimated number of participants and estimated costs per person. Bureaus or independent offices must still submit a final list of participants and associated costs no later than 30-days prior to start date of the event.

24. **Are there limitations on the number of employees who can attend a conference from each bureau, office or mission?**

Bureaus and offices should consider inviting the minimum number of attendees needed to achieve the goals of the conference. The conference organizer should seek to limit the number of participants to two per mission unless adequately justified.

EXTERNAL CONFERENCES

25. **Do I have to request approval to attend an external conference?**

You must enter a request in the **eConference Tracking and Approval System (eCTAS)** to attend an external conference if temporary duty travel is involved unless the conference meets one of the training exemptions outlined in **ADS 580, Conference Planning and Attendance**. Approval is required for **25 or more** employees Agency-wide to attend the same external conference. The Conference Management Team monitors enrollment and will seek approval if the threshold is reached. In any case, the requestor will receive an email notification regarding approval to attend the event.

26. **I am an institutional contractor. Am I required to enter a request in eCTAS to attend an external conference?**

No. Institutional contractors do not request approval to attend a conference through the conference system.

27. **How will I know if I am approved to attend an external conference?**

You will receive an email from **econference@usaid.gov** notifying you of the approval.

28. **The State Department has requested that more than 25 USAID technical officers attend a meeting in Africa to discuss PEPFAR Country Operational Plans. Is the travel of employees exempt from the conference approval process?**

Yes, travel to attend externally sponsored events is exempt when the purpose of the travel falls under "mission" as defined in the Federal Travel Regulation, Chapter 301, Appendix C. This includes travel to a particular site to perform operational or managerial activities and

travel to attend meetings to discuss general agency operations, review status reports, or discuss agency specific topics.

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