

UAA Strategic Framework

2023 Results Report

October 2023

Objective 1: Building an Inclusive Community of Former USAID Staff

In June the **Membership Committee** announced a Membership level of 425, an increase of 13% from 2022. At the same time, it announced a Registrant level of 1278, an increase of 2% from 2022. These strong numbers came about as a result of (i) presentations at the Foreign Service Institute Job Search and Transition Programs in March, August, and October; (ii) presentations to USAID retirees at the April 2022 USAID Retirement Ceremony; and (iii) the new UAA Registrant-to-Member (R2M) initiative encouraging Registrants to become full dues paying UAA Members.

The UAA recognizes publicly the diversity of its membership through its monthly Alumni Profiles and annual Awards Program. As of September 2023, 8 alumni have been recognized in the Alumni Profiles, representing a diversity of gender (6 male, 2 female), ethnicity (7 white, 1 minority), and USAID employment categories (6 FSO, 1 FSN, 1 GS/Political). In 2022, there were 8 profiles of 13 alumni, also representing a diversity of gender (6 male, 7 female), ethnicity (8 white, 5 minority), and USAID employment categories (9 FSO, 4 FSN, 0 GS/Political). We will focus on improving GS alumni recognition next year. While not a consideration for nomination or selection in the UAA Awards Program, a diverse group of candidates were presented for consideration by the Awards Committee. Winners have not been announced for 2023.

The newly created and geographically diverse **Social Committee** planned and managed several well received and attended events. Winterfest (80 participants in 2023 compared to 64 in 2022 of which 39 were in person and 25 virtual). Spring Reception (84 participants in 2023 of which 64 were in person and 20 virtual compared to 68 in 2022 of which 49 were in person and 19 virtual). Summer Picnic (over 70 participants in person in 2023 compared to 69 in 2022). After successfully piloting a small group museum visit to the DC Portrait Gallery, the Social Committee is also arranging two new events to bookend the AGM in October including another DC museum visit and a winery outing.

The **Public Outreach Committee's** focus is to increase UAA presence outside the DC Metropolitan area. This year, the Committee used the Charter on Regional Activities approved by the Board in March 2022 to continue targeting activities with pilot Regional Chapters in Florida and California and initiating discussions with alumni in New Mexico.

The Florida Chapter organized two meetings with its Foreign Service Retiree Association (FSRA) partner, one on the margins of the FSRA Annual General Meeting in Sarasota in January and a second meeting in May in Jacksonville. The meeting in Sarasota attracted 7 USAID alumni in person and an additional 6 virtually. The meeting in Jacksonville attracted 4 USAID alumni and an additional five virtually. Both meetings benefited from a DC-based UAA EXCOM Member (Beth Hogan in Sarasota and Margot Ellis in Jacksonville) joining the FSRA events and helping to organize the UAA side meetings with Florida alumni.

The San Diego California UAA Chapter is tracking the Florida model. It met separately in San Diego with UAA DC Denise Rollins and Florida Chapter Alan Van Egmond for planning purposes. The San Diego team also met with the San Diego FSRA Chair to discuss collaboration on upcoming international-foreign affairs events. An early 2024 joint activity is under discussion. Additionally, the San Diego UAA team is co-leading the initiative to formalize a mutually beneficial partnership between UAA and the World Affairs Councils of America (WACA). A joint meeting and several activities are planned for the week of WACA's Annual Conference, 14-17 November 2023, in Washington, D.C. A draft Memorandum of Understanding may result from that meeting.

The Public Outreach Committee also made progress with its outreach beyond strengthening connections with alumni. Committee members engaged in a series of talks to the NGO Road Scholars from 25 states on USAID and US foreign assistance. The Committee also worked with USAID to finalize the tool kit that members will be able to use as part of future outreach engagements across the country as speakers at schools, universities, businesses, and civic and charitable organizations to familiarize Americans with US foreign policy, foreign assistance and global development.

The Annual General Meeting Committee has targets for increased participation in the AGM, increased participant satisfaction, and increased diversity among presenters at the AGM. There were 180 attendees at the 2022 AGM compared with 202 in 2021. In 2022, of 431 contributing members, 138 UAA members attended the AGM, or 32%. In 2021, 169 UAA members attended the AGM out of 448 contributing members, or 38%. Although the decline is a concern, the number of attendees in 2022 was the second highest of the last ten years. The same number of participants responded to the satisfaction survey in both years (33) and the number of positive responses was almost the same (one more in 2021). In 2022 there were comments indicating a preference for a shorter AGM, and attendance at the meeting declined in the afternoon. The members responding to the survey also noted the importance of more time for interaction among the members attending. The 2023 AGM will be limited to a half day meeting, followed by an open-ended lunch period. Presenters who are person of color increased from 17% in 2021 to 20% in 2022. The number of presenters who were FSNs was the same in both years. Presenters who are woman increased from 58% in 2021 to 65% in 2022.

The **Development Issues Committee's** Development Issues Discussions also reflected a diverse set of speakers including an African American and an Asian American.

Objective 2: Supporting USAID Professional Development and Institutional Capacity

The **Mentoring Committee** oversees the UAA-USAID signature Mentoring Program. This year after six years of leadership from Alicia Dinerstein and Rose Rakas, management of the program

transitioned to Board Members Denise Rollins and Terry Brown. Terry handed over the reins to Denise, who brought Sharon Pauling on board as her co-chair. Additionally, leadership for mentoring at USAID/Human Capital and Talent Management office shifted from Amber Whittingham, now in PPL, to Cory Thompson, a Training Program Specialist in the Center for Professional Development.

The Mentoring Team launched Cohort 12 in September 2002 and recruited 38 UAA member mentors and collaborating with three USAID Bureau Coordinators to enlist 44 FSO mentees based on the Agency's priorities of Senior Leadership Group, Global Health and Africa Bureau staff. Of these 44 mentees 12 were SLG, 14 were GH and 18 were AF Bureau. Margot Ellis and Karen Freeman played a key role in helping the team match mentors to the mentees.

The Team partnered with UAA member Neil Levine specializing in coaching and mentoring to conduct a full day training session for mentors in late January and a 90-minute webinar for mentees at the beginning of February. In late April, the Committee conducted a brief survey to gauge mentee-mentor interactions and the effectiveness of mentoring. With over 50% of participants responding, the results revealed that: 1. Most participants began meeting with their match in January with fewer starting in February and March; 2. The majority of matches meet monthly, fewer bi-weekly, and fewer meet every three weeks; 3. All mentee respondents expressed satisfaction with their mentor match and planned to continue through the program cycle, with some already expressing interest in continuing beyond this cohort period. Some even regretted not joining the program earlier in their careers; and 4. About a quarter of mentor respondents have more than one mentee from previous cohort years. Cohort 12 concluded in July 2023 with 'thank you' emails sent out in August and a few brief questions on the match's success. Cohort 13 will launch in September.

The **Development Issues Committee** embarked on a new pilot Mission Coaching initiative in which it offered limited assistance to USAID Timor Leste and made a presentation to Program Officers in late July on a worldwide call. After getting necessary USG approvals to provide this form of UAA assistance, coordination with the PPL Bureau for support to Missions has stalled, and requires limiting its scope to OUs as targeted, voluntary assistance to Missions.

Objective 3: Increasing Understanding of and Support for International Development

During 2023, the **Development Issues Committee** sponsored two Development Issues Discussions, which were conducted virtually on topics of interest to contributing UAA members. While the DIC discussions were fewer than last year when the committee hosted seven 1 ½ hour virtual discussions and fell short of this year's target, there are three potential discussions in the pipeline planned for September and October.

By mid-September there will have been six Development Dialogues--five of which were hybrid on which UAA and DACOR collaborated on hosting a series of presentations at the DACOR-Bacon House covering topics of interest to both UAA and DACOR members.

The History Committee continues to encourage USAID staff to read *The Enduring Struggle*, the UAA sponsored book written by John Norris. By mid-year well over 200 USAID staff had “borrowed” the eBook from the USAID Library. In addition, about 50 copies were mailed in June (Via State Department/APO) to individual USAID missions around the world. The remaining forty or so UAA-purchased copies will be distributed as appropriate to further increase attention to the book by USAID staff as well as by interested outsiders. The UAA partnership agreement with the AU University Library Archives was signed and the first \$5,000 contribution for 2023 to finance student internships was made. In July, the AU Archivist selected the first intern from among 50 applicants and he has now started to examine, organize, and catalogue the USAID-related documents in the AU Archives. On the UAA website and informally, we have encouraged USAID retirees to contribute their AID-related historical materials to the Archives.

The History of USAID Committee continued its support for ADST Oral Histories of USAID Retirees. The five volunteers have done the 25 oral histories planned for this year representing to the extent possible the diversity of the USAID workforce. Candidates for the final year of interviews have been identified for interviews during the first six months of the coming year. UAA volunteers are also working with ADST to expedite completion and posting of transcripts. Work was also started drafting the required final reports from ADST to USAID to meet the grant completion date in late 2024.

Objective 4: Organizing and Sustaining UAA’s Structure and Operations

This objective is achieved through the hard work of just one committee, **Finance and Administration** working in close collaboration with the Executive Committee and the Board of UAA.

Ongoing activities conducted during this year supported UAAs structure and operations with the following results:

- 501(c) (3) status with the IRS maintained by accurate and timely submission of 990 EZ information return and forms 1096 and 1099.
- Annual budget for expenditures approved and adjusted regularly; reports provided to EXCOM on financial status and expenditures compared to the approved budget at each meeting.
- Expenditures by Treasurer monitored by second Board member.
- Invoices for support to the UAA were paid within 30 days, after confirming accuracy and conformity with contract terms and the approved UAA budget.
- Current website functions were maintained, including keeping the Executive Committee calendar current and posting the Executive Committee minutes (including Membership and Treasurer’s reports) on the public portion of the website within 2 weeks of approval.

- 10 issues of UAA newsletter were each distributed to about 1300 USAID alumni.

Several new activities were initiated this year which improved support for UAA's structure and operations with the following results:

- Application for exemption from DC sales tax initiated.
- Board nominations for vacant seats reflected heightened attention to diversity and equity.
- New Administrative Assistant for membership Committee was contracted.
- Approval of two substantially updated Core process (Contracting and What Needs Board Approval) and four new Core Processes (Board Elections and Schedule; Board oversight of the MOU with USAID; Annual reporting, Planning and Budgeting; and System managers Support). Current versions are posted in the Executive Committee portion of the UAA website.
- Bylaws [Article IV, Section 2, sub-section (b)] amended to clarify that chairs or co-chairs of the committees of the Association are appointed by the Board.
- Survey of UAA current year dues payers was implemented and reports provided to the Executive Committee.