

UAA Strategic Framework

2024 Results Report

October 2024

In accordance with the requirements of the USAID Alumni Association as a 501(c)(3) entity, we report activities and achievements to the membership every year. This 2024 Annual Report summarizes accomplishments of each UAA Committee within the four strategic objectives articulated in the **2022-27 UAA Strategic and Operating Framework**, i.e., (1) Building an Inclusive Community of Former USAID Staff, (2) Supporting USAID Professional Development and Institutional Capacity, (3) Increasing Understanding of and Support for International Development, and (4) Organizing and Sustaining UAA's Structure. The Report summarizes this work. The Annex provides a table with the information and data.

Objective 1: Building an Inclusive Community of Former USAID Staff

UAA's **Membership Committee** strives to increase numbers of registrants and contributing members, and to recruit a diverse group of new USAID alumni. UAA registrants and membership come from two primary sources: yearly FS/GS/FSN USAID retirees and former USAID staff who renew their contributions. UAA has access only to informal sources to identify and recruit former non-FS/GS/FSN USAID staff who meet UAA membership requirements. The number of registrants this year increased by 51: in August 2024 there were 1,340 registrants compared with 1,289 in August 2023. (Please note that some members may also be included in the list of registrants.) However, contributing membership numbers saw a downtick of 49. In August 2024 there were 402 members compared with 451 in August 2023. To address the decline in contributing members, the 2024 membership drive focused on emailing potential membership groups including 2023 members who had yet to send contributions this year, registrants who have not become contributing members, and 2023 retirees, identified primarily from USAID's annual retirement ceremony.

A part-time technical support person worked with the committee for three months this year to provide much-needed support in managing the committee's increased level of effort. The Membership Committee Co-Chairs will work to recruit a replacement to ensure that membership activities receive the support needed for well-informed and dynamic annual campaigns.

The **Social Events Committee** is an important part of achieving Strategic Objective 1, "Building an Inclusive Community of former USAID Staff" by organizing social events, both traditional and opportunistic, for colleagues to gather. This year, all planned events were carried off with an uptick in attendance - over 70 at Winterfest and at the Spring Reception. We added an event in 2023 in support of the Annual General Meeting – Wine and Wagu, which was very well received and attended by 19 alumni, and we plan to host a dinner cruise for the 2024 AGM. We changed the venue for the Winterfest, which was a bit more of a strain on the budget but well worth it. We continued with a hybrid Spring Reception at DACOR Bacon with a keynote from Sonali Korde, AAA/BHA, who discussed current humanitarian issues. Two events, one with Deputy Mission Directors (hosted by MFAN with UAA as a partner) and one with Mission Directors and Representatives, were unplanned but supported our continued drive for future membership, put attendees in touch with current issues of the day, and continued to support mentorship of our active-duty colleagues. One "self-pay" event proved highly successful as 12 members joined

on Wolf Trap's lawn to enjoy an evening with John Legend. We continue to support more regional involvement and have members on our Committee from California, Florida, and New England/North Carolina. We were particularly pleased to welcome a senior civil service retiree to the Social Committee.

The **Public Outreach Committee's** annual targets for increased activities outside the DC Metro area include building UAA Chapters in retiree-dense regions of the country, finalizing and expanding use of a 2024 Speakers' Kit, increasing Committee membership, and developing partnerships between UAA and strong non-USAID partners whose mission is consistent with UAA's. Following final review by USAID, UAA's LPA-illustrated Speakers' Kit will be widely disseminated for use by UAA members for their outreach activities. The training program for UAA speakers will be enhanced once the Speaker's Kit is released.

Partnerships are important to increase understanding of and support for international development. With participation from UAA's Executive Committee, in 2023-2024, the Committee launched two regional chapters, one in Florida which has hosted several joint events with the State Department's local AFSA members including from the DC area, and the other in Southern California, still in fledgling status. The new UAA chapters in Florida and California built strong partnerships with their local AFSA units to work together on events. The UAA Florida chapter provided speakers for two AFSA-UAA local events. UAA's Southern California chapter held several meetings with the San Diego branch of the Foreign Service Retirees Association (FSRA) to plan joint events.

The Committee expanded its membership and invested most of its efforts to develop and strengthen old and new partnerships. It expanded the number of speakers and outreach to build UAA participation in the AFSA and Road Scholar (an educational travel organization) to provide speakers on foreign policy, as well as the Hometown Diplomats programs. A limited UAA Survey Monkey was undertaken, providing initial feedback from the field members regarding their priorities and interests in and expectations of UAA. A similar survey will be conducted in Florida on November 14-15, 2024 during a UAA/FSRA event in Ft. Myers, Florida, which will feature a key speaker on foreign policy and a side meeting of UAA members in attendance.

The **Annual General Meeting (AGM) Committee** has annual targets for increased participation in the AGM, increased participant satisfaction, and increased diversity among presenters. There were 164 attendees at the 2023 AGM, compared with 180 in 2022. The attendees include UAA members and guests invited by the Association, and in 2023 fewer guests attended. In 2023, 140 of UAA's 483 contributing members, or 29%, attended the AGM. In 2022, 138 of the 431 contributing UAA members, or 32%, attended the AGM. Based on feedback we had received after the 2022 AGM, we shortened the 2023 agenda to half a day, followed by an extended period for members to socialize over lunch. We also provided both in-person and virtual attendees with a new satisfaction survey, which was completed by 59 attendees, compared with 33 feedback forms completed in 2022. The new form asked members to indicate, on a scale of 1 (poor) to 5 (excellent), their satisfaction with each segment of the AGM and other matters, and comments for improvement. The average of the rankings was 4.5, showing a high level of

satisfaction with the 2023 AGM. There were 16 presenters in 2023 versus 20 in 2022. The proportion of presenters who are persons of color decreased from 20% in 2022 to 13% in 2023. The number of FSN presenters was the same in both years. Presenters who are women increased from 65% in 2022 to 69% in 2023.

Objective 2: Supporting USAID Professional Development and Institutional Capacity

The **UAA-USAID Mentoring Program** is growing as the Agency promotes the program among USAID staff. Cohort 12, launched in September 2023, recruited 38 mentors and 44 mentees (five mentors agreed to mentor two mentees): twelve in the Senior Leadership Group (SLG), thirteen in Global Health (GH), and nineteen in the Africa Bureau (AFR). Fifty-six percent of the mentees were in the SLG and GH backstops. The AFR mentees were in a variety of backstops (BS), with Program Officers (BS-02) the largest group, followed by Crisis, Stabilization, and Governance Officers (BS-76), Economics (BS-11); Financial Management (BS-04); and Contract Officers (BS-93). The Cohort 12 final evaluation revealed that the top three themes most frequently discussed between mentor-mentee pairs were (1) managing up, (2) career development and promotion, and (3) leading a team, office, and mission. The program has received positive participant feedback, reaffirming its success and impact.

Cohort 13 included the second-highest number of pairings in the program's history, with 64 mentors and 70 mentees (six mentors agreed to mentor two mentees) in the SLG and three bureaus – GH, AFR, and Asia. Of the 70 mentees, fifteen were SLG, ten from Asia, thirty-four from Africa, and eleven from Global Health. Of the two regional bureaus (Africa and Asia), the mentees also included FSOs from the following backstops (BS): ten Education Officers (BS-60), ten Crisis, Stabilization, and Governance Officers (BS-76), and ten Contract Officers (BS-93). Other than Program Officers (BS-02), which had seven mentees, the rest of the backstops contributed fewer than five each. Cohort 13 is a diverse group, with nearly a third (28%) of mentees bringing in 15+ years of experience, 18 percent with 10-15 years, 25 percent with 3-10 years, and 27 percent with 1-3 years of experience. This rich mix of experience levels reflects the program's ability to cater to a wide range of needs and ensures a robust learning environment for all participants, showcasing the program's inclusivity of and its potential impact on a diverse group of professionals.

Cohort 13 officially concluded on June 30, 2024. The mid-point check-in conducted in April confirmed the Cohort 12 evaluation program results – career development, managing and leading teams – as the significant areas of mentor-mentee focus. It also revealed that the Cohort 13 training held in January benefited from increased collaboration and information-sharing by Agency leadership and the Human Capital and Talent Management Bureau on workforce strengthening, career development, and promotion. The training also benefited from the participation of the American Foreign Service Association (AFSA) leadership, which provided critical insights regarding its efforts to enhance the Foreign Service's effectiveness and protect its members' professional interests. The program has been strengthened further by increased recruitment efforts for mentor participation, including the development of a new mentor program brochure, outreach to recent retirees in the Foreign Service Institute's Job Search

Training Program, and participation in USAID programs such as the Deputy Mission Directors conference, the Mission Directors Conference, and the Senior Leaders Seminar.

The **Development Issues Committee** continued to engage USAID’s Policy, Learning and Research (PLR) Bureau staff to introduce UAA’s volunteer advisory service program. One successful Mission coaching service assistance effort was completed with USAID India under UAA’s new pilot Mission Coaching initiative.

Objective 3: Increasing Understanding of and Support for International Development

The **Development Issues Committee** sponsored four Development Issues Discussions virtually on topics of interest to contributing UAA members. The topics selected included Global Humanitarian Assistance; a presentation by USAID’s Chief Economist Dean Karlan on his new role; a discussion on AI and USAID Policy; and a presentation on USAID’s Development Innovation and Technology Office and support to USAID programs. Fewer discussions were held this year than last year and fell short of this year’s target of eight discussions. There are two potential discussions in the pipeline for September and October.

As part of the **History Committee’s work with** ADST in producing Oral Histories, five UAA volunteers continued to conduct interviews of former USAID officers. This has enabled ADST to slightly exceed the number of interviews expected under its three-year USAID grant – 73 vs. the target of 70. UAA volunteers also updated the indices covering the 250+ USAID interviews in the ADST oral history collection, thus providing a potentially useful research and training tool to USAID. Similarly, the UAA volunteers prepared several “lessons learned” papers for USAID on topics such as leadership, localization, influencing global development policy, disaster and emergency assistance, mission closures, post-conflict planning, cross-sectoral programming, and policy reform.

The History Committee; also continues to encourage USAID staff to read ***The Enduring Struggle***, the UAA-sponsored history written by John Norris. USAID staff can “borrow” the eBook from the USAID Library, and copies were mailed (Via State Department/APO) last year to individual USAID missions around the world. Nearly 50 of the total 252 UAA-purchased copies were distributed this year to Payne Fellows, leaving fewer than a dozen for selective distribution to key recipients in the months to come.

The UAA partnership agreement with the American University Library Archives is now in its second year and the second \$5,000 contribution was made early in 2024 to finance student internships. The first intern examined, organized, and catalogued several of the USAID-related document collections. The second intern will begin work as the academic year 2024-25 begins. UAA volunteer Cindy Clapp-Wincek has begun focusing on these files to help identify important potential research projects for interested students and scholars. Late in the calendar year the Committee will review the results of the program thus far and recommend its continuation – or not – for the next three years. On the UAA website and informally, we encouraged USAID retirees to contribute their AID-related historical materials to the Archives.

By end-September there will have been five Development Dialogues on which the UAA and DACOR collaborated, hosting a series of lunch presentations at the DACOR-Bacon House and on-line, covering topics of interest to both UAA and DACOR members

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

The Finance and Administration Committee has annual targets, performance measures, and results achieved as shown in the Annex. The detailed administrative and financial management activities of the UAA, as a 501(c)(3) entity, are detailed in this section in the Annex table under Objective 4.

In sum, UAA's finances are in good condition, with little fluctuation in our total assets year over year. Oversight by the Board and the Executive Committee is facilitated by approval of an annual budget and regular reporting of revenue and expenditures against that budget. Our system of approval by both the Treasurer and a designated Board member of expenditures prior to payment is working well. One item that has proved difficult is obtaining tax exemption from DC taxes, which is still in process. Most administrative actions are unremarkable.

Annex

**Results Data for 2023/2024 report
(September 30, 2023 to October 1, 2024)**

Strategic Issue 1: Building an Inclusive Community of USAID Alumni

Membership Committee

| Annual Targets | Performance Measures | Results Achieved |
|-----------------------------------|-----------------------------|--|
| Increased number of members | Number of members | Downtick of 49 members. In August 2024 there were 402 members and 451 in Aug. 2023 |
| Increase in number of registrants | Number of registrants | Uptick of 51 in total registrants. In August 2024 there were 1,340 Registrants and 1,289 in Aug. 2023. |
| Increased member diversity | Numbers from diverse groups | Uptick of 7 FSNs, GS and FS retirees |

Social Events Committee

| Annual Targets | Performance measures | Results Achieved |
|--|--|--|
| Major regions represented in planning. | Number of regions participating in social events | Our hybrid Spring Reception is the largest contributor with virtual participation from California, New Mexico, New England, Florida and North Carolina members. We had 3 non- DMV members attending the Wine and Wagu event after the 2023 AGM. |
| Three to four informal events sponsored in DMV | Additional members subscribing at social events | This year, all planned events were carried off with an uptick in attendance – over 70 at Winterfest and at the Spring Reception. We added an event in 2023 in support of the Annual General Meeting – Wine and Wagu, attended by 19 alumni. Two events held, one with Deputy Mission Directors and one with Mission Directors and Representatives. Twelve members joined on Wolf Trap’s lawn to enjoy an evening with John Legend. |
| One regional event sponsored. | One event outside of DMV implemented. | While we continue to offer funding to regions but no takers yet. We will be working, along with the Outreach Committee, to present opportunities. Support to continue for more regional involvement |

| | | |
|---|--|--|
| | | and have members on our Committee from California, Florida, and New England/North Carolina. |
| Collaboration with other UAA committees Increased | Number of collaborative activities supported | Collaborated with Membership and Mentorship on the events with Mission Directors and Deputies and with AGM on the social excursion following that meeting. |

Public Outreach Committee

| Annual Targets | Performance measures (OC 2023 vs 2024) | Results Achieved |
|---|--|---|
| Increase UAA activities outside the DC Metro area | Add Regional Chapters (2) | UAA Florida Chapter launched: Two joint meetings with FSRA & separate UAA meeting followed. UAA (S)California Chapter underway: Joint planning with FSRA for Fall event |
| Finalize updated, LPA-approved 2024 Speakers' Kit (SK) | LPA-approved UAA SK completed & distributed SK distributed to trained UAA for public outreach UAA uses SK for outreach efforts | LPA is finalizing its approval of the UAA Speaker's Kit (estimated completion 09/30/2024). Speaker's Kit training for UAA upon LPA concurrence (Fall 2024) UAA uses Speaker's Kit following training (end Fall 2024) |
| Increase Outreach Committee membership | Add Outreach Committee members | The Outreach Committee added four members to its existing four. |
| Develop & grow new partnerships: World Affairs Council of America (WACA) AFSA Road Scholar Program Hometown Diplomats/FSRA | WACA: UAA Board designee to attend WACA's Annual Conference in D.C., 20-22 Nov. 2024. AFSA Road Scholar: Increase UAA participation Hometown Diplomats re-launched; Establish FSRA relationship in Florida and California. | UAA Board designee to attend WACA's Annual Conference in D.C., 20-22 November 2024 (budget approved) AFSA Road Scholar Program: Three UAA members led DC and NY programs reaching several hundred participants. Hometown Diplomats program reinstated as a result of UAA support FSRA-UAA Regional Chapter Florida: Three events co-hosted. FSRA-UAA Regional Chapter Southern California: Two planning sessions held for a joint event for Fall 2024 Training program for UAA members awaits Speaker's Kit final LPA concurrence |

| | | |
|--|--|---|
| Training program Speaker’s Kit for UAA members UAA Survey Monkey (to increase membership & diversity) | Training program for UAA members established UAA Florida Survey Monkey launched and analyzed – membership & diversity increased | UAA Regional Chapter Florida Survey Monkey ready for distribution at the November 14-15, 2024 FSRA meeting. Analysis to follow. |
|--|--|---|

AGM Committee

| Annual Targets | Performance measures | Results Achieved (AGM 2023 vs 2022) |
|---|--|---|
| Increased participation in AGM | Number of attendees | 164 attendees at the 2023 AGM, compared with 180 in 2022. |
| | Percent of contributing members attending | 140 UAA members attended the 2023 AGM of the 483 contributing members, or 29%. 138 UAA members attended the 2022 AGM of the 431 contributing members, or 32%. |
| Increased participant satisfaction | Positive participant responses per survey | There were 59 survey respondents after the 2023 AGM, with an average rating of 4.5 on a five-point scale of satisfaction (1 poor 5 excellent). There were 33 survey respondents after the 2022 AGM. In 2022, with 17 positive comments. |
| Increased diversity among presenters in AGM session | Percent of AGM presenters who are people of color/FSNs/women | In 2023, of 16 presenters, 2 (13%) were people of color, 1 (7%) was a former FSN, and 11 (69%) were women. In 2022, of 20 presenters, 4 (20%) were people of color, 1 (5%) was a former FSN, and 13 (65%) were women. |

Strategic Objective 2: Supporting Professional Development and Institutional Capacity

Mentoring Committee

| Annual Targets | Performance measures | Results Achieved (2023 vs 2022) |
|--|---|--|
| Number of UAA Volunteers supporting the Mentoring Program (UAA wide-target) • Number of Mentors • Number of Mentees • Number of Matches (Target numbers for mentors and | Cohort 12 launched ● UAA mentors recruited ● USAID mentees recruited ● Mentors and mentees training conducted ● Cohort 12 evaluated | Cohort 12 - 38 mentors Cohort 13 - 64 mentors Cohort 12 – 44 mentees Cohort 13 – 70 mentees Cohort 12 evaluated and report issued to USAID |

| | | |
|--|---|--|
| mentees for Cohort 12 will depend on the number of volunteers recruited to support the program.) | <ul style="list-style-type: none"> ● Reports issued to USAID Senior Leadership | |
|--|---|--|

Development Issues Committee

| Annual Targets | Performance Measures (DIC 2023 vs 2024) | Results Achieved |
|--|---|---|
| Initiate a Mission “coaching” service program with USAID | 1 – 2 pilot mission “coaching” efforts established. | A pilot mission coaching service provided to one Mission. |

Strategic Issue 3: Increasing Understanding of and Support for International Development

Development Issues Committee

| Annual Targets | Performance Measures | Results Achieved |
|--|---|--|
| DIC discussions continue | Number of discussions 8 – 9 discussions | 5 discussions held |
| Increase diversity of speakers and from organizations other than USAID | Percent of DIC speakers included under DEIA inclusion policy. | Of the six speakers, 35% were (2) women and or (2) people of color. Three speakers were from other organizations than USAID. |
| Development Dialogues at DACOR | 10 DDD | Five events held. |

History of USAID Committee

| Annual Target | Performance Measure from 2023/24 Plan | Results Achieved |
|---|--|---|
| Oral History Interviews Done According to Grant Provisions | All interviews to be completed by 7/31/24 to ensure grant total of 70 reached | 70 interviews completed by 7/1/24; 3 more in process and to be completed by September 2024 |
| Transcripts Edited and Posted According to Grant Provisions | ¾ of all interviews done (52 of 70) to be edited and posted by end of grant, 9/30/24 | 23 posted as of 7/1/24; 11 in final process to be posted by 8/1/24, making total of 34 or 46% of the 73 interviews posted by 8/1/24. 20 more interviews |

| | | |
|--|---|---|
| | | expected to be posted by 9/30/24, thus reaching 75% target. |
| Indices and Reports Done According to Grant Provisions | UAA volunteers provide ADST with drafts for submission by ADST before end of grant, 9/30/24 | ADST requesting no-cost extension of grant to ensure more interviews completed before final reports done. If extension not granted, draft reports and updated indices done by UAA volunteers to be given to ADST on 9/20/24 with ADST submitting to USAID by 9/30/24. |

| Annual Target | Performance Measure from 2023/24 Plan | Results Achieved |
|---|---|---|
| Continue to publicize and make available copies of <u>Enduring Struggle</u> to the international development community. | Distribute remaining copies of <u>Enduring Struggle</u> | <ul style="list-style-type: none"> 45 copies distributed to USAID Mission Director offices 48 copies distributed to Payne Fellows |
| Continue partnership with AU Library Archives | <ul style="list-style-type: none"> Intern has reviewed donated collections and begun cataloguing and preparation of research guides. With AU, evaluate experience and extend agreement for 3 more years if warranted. Additional USAID alumni collections donated – aim is at least ten. | <ul style="list-style-type: none"> First student intern financed under grant; second will begin in academic year 2024-2025. With help from Cindy Clapp-Wincek, preliminary research topics identified. Results of program to be reviewed in final months of 2024. Target of ten new collections not achieved. |

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

| Annual Targets | Performance measures | Results Achieved |
|--|--|--|
| FINANCES | | |
| Meet IRS requirements and due dates for form 990 (information return) and 1099 NEC (Non- | Form 990 submitted by IRS deadline or requested extension. Submit forms 1099 NEC (Non-Employee | Extension Form for submission of Form 990 approved by IRS. Now due 11/15/2024. |

| | | |
|---|--|---|
| Employee Compensation) | Compensation) to IRS and recipients by deadline. | 1099 NEC forms sent to payees 1/27/24 and mailed to IRS on 1/30/24 with covering form 1096. |
| Obtain (DC tax) exemption in time to cover purchases during 2024 | File Forms FR-500 and FR 164 to DC Office of Tax and Revenue | Additional consideration needed of the cost/benefit of completing registration of UAA with the D.C. Government, and applying for exemption from D.C. sales tax |
| Operating Expenses and History Project Budget developed and tracked | Board approves Annual Budget NLT January EC meeting | 2024 Budget approved by Board on 12/14/23; amended by Board on 6/2024. |
| Monitor financial accounts | Budget & Financial account reports for each EC meeting | 11 Budget and 11 Financial Reports provided to EC. (No August meeting, but both July and August figures reported at September EC.) |
| Designated Board member authorizes Treasurer to pay invoices presented. | Authorizations filed with payment records. | Emailed authorizations filed with bank statements. Where a conflict of interest existed (like the usual authorizer requesting reimbursement for UAA expenses), an alternate authorizer was used. |
| UAA VOLUNTEERS | | |
| Board nominations reflect needed skills to replace members rotating off and diversity of gender, racial, and employment status. | NLT 6 months from prior election, Board appoints 3-member Nominating Committee Nominating Committee report to Board NLT September EC meeting describes how continuity and diversity considerations are reflected in nominations | Board appointed Nominating Committee on 5/2/24, as reported to the EC at the May meeting. Nominating Committee report to Board included information about how continuity and diversity considerations were reflected in the nominations. |
| UAA PAID SUPPORT | | |
| Invoices for services paid per contract. | Within 30 days of presentation, invoices are checked for accuracy and conformity to contract terms and approved budget, payments authorized, and payments made. | During the last 12 months, all final invoices were paid within 30 days of submission. |
| Recruit, select, and negotiate contract with | New contract signed and maintained in Treasurer files. | No new AAs hired for committees this year. |

| | | |
|--|--|--|
| selected candidate (for AA positions). | | |
| UAA PROCESSES | | |
| Document 3-4 additional or substantially revised Processes, either Financial or Administrative. | 3-4 additional or substantially revised Processes approved by Board and posted on the password protected website for EC use. | No additional or substantially revised processes developed or approved this year. |
| Bylaws reflect current and best practices for UAA. | Board approves or rejects any proposal for bylaws changes presented. | No Bylaws changes presented to Board this year. |
| SOFTWARE | | |
| Website available and useful for prospective members, current members, UAA volunteers, and UAA staff | <p>Password-protected Executive Committee Calendar is current.</p> <p>EC minutes are posted within 2 weeks of approval.</p> | <p>Calendar is reasonably current.</p> <p>EC minutes were posted promptly (normally within 24 hours) once approved by the Board and transmitted to our web poster.</p> |
| COMMUNICATIONS | | |
| Publish 10 editions of UAA Newsletter annually | Distribute Newsletter to all UAA Registrants 10 times per year | Newsletters distributed to the Constant Contact list of UAA registrants (which includes UAA members) monthly, except a combined August/September and November/December issues. |
| ETHICS/CONFLICT OF INTEREST | | |
| 100% Compliance | Distribute Statement of Policy and Acknowledgement at first EC meeting following the AGM; follow up until 100% compliance | Statements distributed to EC members in advance of the 11/16/23 EC meeting, with a request to submit NLT the 12/14 EC meeting. Following reminders, all but one of the 26 Board members, EC members, officers and Special Advisors (96%) signed and submitted COI acknowledgement forms this year. |