The Executive Committee ("EC") of the USAID Alumni Association ("UAA") met on Thursday, February 20, 2020, at the offices of Tetra Tech, Inc., 1320 North Courthouse Road, Suite 600, Arlington, VA 22201, at 9:30 am. The following UAA directors, EC co-chairs and staff members were present:

**BOARD MEMBERS**

In person:
- Anne Aarnes
- Chris Crowley
- Carol Dabbs
- Margaret Neuse
- Nancy Tumavick

By phone:
- Jim Bever
- Terry Brown

**COMMITTEE CO-CHAIRS**

In person:
- Bette Cook
- Steve Giddings
- Beth Hogan
- Roberta Mahoney
- Tom Nicastro
- Carol Peasley
- Joy Riggs-Perla
- Alex Shakow
- Rob Sonenthal

Absent:
- Jim Fox
- Rose Rakas
- Nancy Pielemeier

**WEB CURATOR**

In person:
- Tish Butler

**ADMINISTRATIVE STAFF**

By telephone:
- Ven Suresh

**MEETING CHAIR**

Nancy Tumavick

* * * * *

Nancy Tumavick called the meeting to order at 9:30 am, and noted the presence of a quorum of the members of the Board.
1. **MINUTES.**

A motion to approve the draft minutes of the January 16, 2020 meeting, duly seconded, was adopted by unanimous consent. Approval of the draft minutes for the November 14, 2019 meeting was again deferred.

2. **FINANCIAL AND MEMBERSHIP REPORTS.**

A. **Financial Report.**

Carol Dabbs called the EC’s attention to the Financial Report as of January 31, 2020. (Attachment A). She noted that —

- Under "UAA Operations Account," deposits to the checking account represent membership contributions received via Click & Pledge and checks received for January.
- The History of USAID Project savings account earned $119.21 in interest for October to December 2019.

B. **Membership Report.**

Bette Cook reported on UAA membership statistics for January 2020.

- There were 2 new registrants in January, for a total as of January 31 of 1101 registrants, compared to 1,012 on the same date in 2019.
- 153 member contributions were recorded in January 2020, a number of which were received in December 2019; the comparable figure for January 2019 was 142. Two of the contributors contributed for the first time.
- Seventy-three of the January 2020 contributions were of $100 or more, compared to only 50 in January 2019.
- Henceforth, in the charts comparing current membership statistics to the two previous years, the vertical axis will start at 0, in order to convey a more accurate picture of year-to-year changes.

Carol Dabbs noted that the data on contributions reported by Click & Pledge for January showed multiple contributions from a number of individual contributors. While it is possible that these multiple contributions were deliberate, Carol will work with Ven to contact the contributors directly to determine their intent.

3. **BOARD OFFICERS/COMMITTEE CHAIRS: CURRENT ISSUES**

A. **Participation in UAA events.**

Nancy Tumavick proposed that the EC consider adopting a statement of policy on who may participate in UAA events, and on post-event dissemination of audios, videos and transcripts. She (and Alex Shakow) noted that, at the recent UAA/DACOR panel discussion on Afghanistan, where Bambi Arellano was the Moderator and former Mission Directors were the panelists, attendance had to be limited due, in part, to
lack of space, but also to the speakers' concern about public disclosure of their off-the-record remarks. As a result, people who were not members of either DACOR or UAA were turned away (including some Afghan hands whose presence could have enriched the discussion), and audio of the discussion will not be posted on the UAA website. At another meeting, where USAID insiders discussed procurement, two USAID contractors, neither of whom was a UAA member, were excluded.

The following issues and possible approaches were discussed:

- Limiting attendance at DACOR/UAA events to members, and admitting non-members on a case-by-case basis.
- If speakers want their remarks to be off-the-record, preparing a summary of the discussion that does not attribute particular views to particular individuals.
- Adopting a special rule for institutional contractors who are also members of UAA.
- Distinguishing between internal meetings, where attendance is presumed to be limited, and meetings designed to reach out to the general public, which are presumed to be open as part of our public education function.

At the suggestion of Bette Cook, the EC agreed that the maximum number of guests allowed to each member would be reduced from 5 to two at our social events. Ven will revise the on-line event acceptance form accordingly.


(1) IRS Notices.

Carol Dabbs reported that UAA has received notice from the IRS of a $400 penalty for late filing of its Form 990 for 2017, and a $3,300 penalty for late filing of its Form 990 for 2018. After consultation with the Board, Carol has asked the IRS to forego the penalty for 2017, citing the sudden increase in UAA income due to contributions to the History of USAID Project, which required that we use the 990 long form instead of the postcard form for the first time. She believes the IRS is willing to consider doing so. The penalty for 2018 may be more difficult to avoid; the 2018 return was 6 months late, and UAA apparently failed to request an extension.

Carol noted that, while she negotiates with the IRS regarding exoneration, interest would be accruing on the unpaid penalties. She therefore worked with the Co-Chairs and the Board to propose that UAA pay the full amount of the penalties now to stop the accrual of interest. If the penalties are exonerated, in whole or in part, the IRS will issue a refund.

The Board approved payment of the penalties, and corresponding changes to the 2020 Budget.

The Board approved a draft letter which Carol subsequently sent to the IRS, payment of the IRS penalties, adopting the necessary revisions to the 2020 Budget, by unanimous written consent via e-mail on February 2. The changes in the Budget were necessary in order for the penalties to be paid; our bylaws require Board authorization for all expenditures. At this meeting, the Board agreed that UAA members would be notified once the IRS makes a final decision on exoneration.
Carol will work with our tax accountants to assure that the tasks necessary for our 2019 tax filing are done in a timely manner. (For example, Form 1099s for 2019 have already been issued to Ven Suresh and John Norris.).

(2) Financial Review.

Terry Brown reported that an ad hoc subcommittee on finance had its first meeting on February 12, and distributed a memo to the Board concerning its recommendations. Terry proposed that someone with financial expertise be recruited to support the subcommittee — preferably someone resident in the Washington metropolitan area. He invited EC members to forward recommendations to him.

Terry also reported that our accountant has proposed performing a "compilation review," which the ad hoc committee recommended begin in June because tax season has eased up by then. The review would not be a formal audit, but would determine whether UAA transactions are fully and accurately recorded and documented, and would review and evaluate UAA's internal controls. The next step would be to prepare terms of reference, and determine the cost more precisely.

After discussion, the Board authorized the ad hoc committee to proceed with preparations for the proposed "compilation review."

Carol raised the subject of Directors and Officers insurance, which UAA does not currently have. Carol Peasley offered to share her research on the subject. She will explore this possibility and report to the Board at a future meeting.

C. Systems Review.

(1) Communications.

Margaret Neuse recalled that the review of communications systems is focused on three items: the website; the Newsletter and the LinkedIn web pages.

With respect to the website, we are considering questions such as:

- Should the column headed "What is the UAA" appears on the left side of every web page, or only the home page?
- Should information now on the website be more condensed and user-friendly?
- Does the website contain outdated information that should be removed?
- How can we identify and correct errors (e.g., deceased members still listed, incorrect e-mail addresses)?
- Should there be a special area on the website accessible only to members of the Board and EC?
- Is the "Forum" working as intended? It was originally intended to generate discussion, but has been used to post information without any back-and-forth. And some of the posted information would fit more comfortably under "Opportunities."

With respect to the Newsletter:
• Should the content of the Newsletter be more condensed? It was originally conceived as "lean and mean," but has expanded over time.
• What should be the relationship between the website and the Newsletter? Now there is significant overlap. Should one or the other be a "one stop" location for UAA news and information?

With respect to the Linked In: We need some technical assistance to find the two UAA web pages

(2) Operations.

Discussion was deferred to the March meeting.

D. New Ideas/New Initiatives.

Jim Bever called the EC's attention to his summary of seven UAA new ideas/new initiatives, and proposed to discuss four.

(1) USAID Recruitment.

USAID has gotten a green light from Congress, OMB and the State Department to hire up to 175 new Foreign Service Officers between now and the end of the 2020 fiscal year; 50 new FS-05 hires are already being processed. Rory Donohoe, Senior DAA for HCTM, has proposed that UAA alumni support the recruitment process by participating in initial screening, serving on interview panels, and assisting with the orientation of successful candidates for the other 125 authorized to be hired.

DAA Donohoe anticipates the need for 3 to 4 alumni working full time; and perhaps an additional 8 to 10 alumni working part-times, as and when needed for interviews. In his view, the alumni had to be experienced, and to be team players with excellent interpersonal skills. Jim raised the issue of compensation, suggesting that full-time assistance be compensated, but that part-time assistance be provided pro bono. (Nancy Tumavick suggested that paid positions be listed in the "Opportunities" section of the website, and unpaid positions in the "Volunteers" section.)

The procedures for selecting alumni participants, and assigning them to screening, interviewing and orientation, have yet to be defined. But he anticipates that USAID will reserve the right to decide whom to engage, based on short summaries of the candidate's background and experience collected and forwarded by UAA. All participants would sign a non-disclosure agreement similar to the model recently negotiated by Tom Nicastro with the Development Lab.

The EC authorized Jim to continue his discussions with DAA Donohoe, and to provide an update on the discussions at the March meeting.

Nancy Tumavick noted that a multi-purpose memorandum of understanding (MOU) had been drafted, based on the MOU between USAID and UAA for the Mentoring Project, and the MOU between the Peace Corps and the Peace Corps Association, and was being circulated for comment. She asked that comments be returned by March 9.
(2) **Retirement Ceremony.**

In Carol Peasley’s view, it would be a mistake to honor only Senior Foreign Service Officer and Senior Executive Service employees at the proposed retirement ceremony. The ceremony should extend to long-term employees as well — for example, employees who served 20+ or 25+ years — regardless of their rank.

Jim acknowledged Carol’s point, but suggested that expanding the universe of honorees could pose logistical problems. He agreed to raise the issue with DAA Donohoe.

(3) **CDCSs.**


(4) **Public Outreach.**

Beth Hogan reported on a discussion that she and Jim Bever held with UAA members living in Florida. It appears that the alumni are dispersed throughout rather than clustered, but are nevertheless seriously interested in the idea of a UAA satellite group based in Florida. For that reason, Beth and Jim anticipate a formal invitation to visit Florida this Spring.

Beth and Jim have also scheduled a meeting with Eric Rubin, Executive Director of AFSA, to explore the possibility of collaboration.

E. **Nominating Committee.**

In the past, the Nominating Committee has consisted of three or four members. There are two Board members with terms ending in 2020 eligible for re-election: Anne Aarnes and Terry Brown. The Board members who are not eligible for re-election, Nancy Tumavick and Chris Crowley, would normally serve. Margaret Neuse and Jim Bever agreed to join the committee for 2020.

4. **OPERATING COMMITTEE REPORTS.**

A. **Annual General Meeting.**

Joy Riggs-Perla delivered the AGM Committee report:

- The overall theme of the 2020 AGM will be global climate change.
- There will be two panels in the morning: (1) a technical panel; and (2) a panel of development practitioners, including country specialists and FSNs, who will assess the sectoral impact of climate change.
- The theme of the afternoon session has yet to be decided, but could include new hiring, mentoring.
- Chris Crowley will take the lead in developing the concept for the main sessions of the AGM on the issue of climate change and development. He will consult with Ray Martin, Bob Ichord and others in the development of this concept.
B. History of USAID.

Alex Shakow reported that—

- Author John Norris has completed 12 chapters of the book, and is currently refining and sharpening the text.
- A final chapter — stating the study's conclusions — has yet to be written.
- John will be able to draw on recently released oral histories suggested by Carol Peasley to help fill in additional field examples for his latest chapters.
- John will meet with CGD in March to get feedback, and with the Advisory Committee immediately thereafter.

Beth Hogan suggested that we consider having another AGM "conversation" with John about the book, given that the conversation presented at the 2019 AGM was so well-received.

C. Development Issues.

Steve Giddings reported that, in response to Maureen Shauket's invitation, the DIC was beginning to recruit UAA alumni volunteers to assist with the preparation of CDCSs. A notice sent to the members of the committee generated 9 expressions of interest.

When Steve, Jim Bever and Terry Myers met with Ms. Shauket to discuss UAA's proposed contribution, she stressed that USAID was not seeking assistance in drafting the CDCSs, but rather for alumni perspective on the CDCS process based on their past agency experience — for example, on how the CDCSs relate to the country road maps. She suggested that two alumni would be assigned to selected CDCSs, mostly in Africa, at the concept paper stage. Steve sent Ms. Shauket a model non-disclosure agreement provided by Tom Nicastro, and will report back on further developments.

Regarding upcoming DIC events, Steve noted that—

- Andy Herscowits has tentatively agreed to attend the DIC’s bimonthly meeting in early April.
- The UAA Book Club will meet on March 25 to discuss a new book by Daniel Markovits, The Meritocracy Trap: How America's Foundational Myth Feeds Inequality, Dismantles the Middle Class, and Devours the Elite.

D. USAID Strengthening

Roberta Mahoney reported on the 2020 cohort of the USAID/UAA Mentoring Program.

- Forty-six of the 50 mentor/mentee pairs have been successfully launched.
- The committee has been talking with the contractor that does electronic matching for the Mentoring Program in an effort to fine-tune the matching process.
- The committee is also review the Mentoring Program evaluation questionnaire in light of recent experience.
E. **Public Outreach.**


F. **Membership.**

Bette Cook was delighted to report that—

- Winterfest 2020, held at the home of Frank and Antoinette Almaguer on February 7, was a solid success. Of the 80 members and guests who registered, 59 actually attended.
- In the future, to keep the no-shows to a minimum, we will encourage members to register early and, shortly before the event itself, will ask them to confirm that they plan to attend.
- The Spring Reception is scheduled for Sunday, May 17, at the Shakows' in Kensington, Maryland.
- The Summer Picnic will be held on Saturday, September 12, from 12:00 noon to 3:00 pm at Fort Hunt Park, Alexandria, Virginia.
- The committee received 40 suggestions for Alumni Profiles, 29 of which were accepted.
- Material for the March Newsletter will be published on March 2nd. Material to be included in the Newsletter should be received no later than February 24.

5. **OTHER BUSINESS.**

None.

6. **NEXT MEETING.**

The EC meeting scheduled for Thursday, March 19, will be held at the offices of MSI, 200 12th Street South, Suite 1200, Arlington, Virginia 22202 between 10:30 am and 12:30 pm.

7. **ADJOURNMENT.**

A motion to adjourn, duly seconded, was adopted without objection. The meeting adjourned at 11:30 p.m.

Respectfully submitted,

Rob Sonenthal
Assistant Secretary

Date: March 19, 2020
Attachments:

A.  UAA Financial Report as of January 31, 2020  
B.  UAA Membership and Contributions Summary, January 1 – January 31, 2020  
C.  Revised 2020 Budget.
### UAA Financial Report
#### As of January 31, 2020

<table>
<thead>
<tr>
<th></th>
<th>Balance 12/31/19</th>
<th>Deposits</th>
<th>Disbursements</th>
<th>Balance 1/31/20</th>
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</thead>
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<tr>
<td><strong>UAA Operations Account</strong></td>
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<tr>
<td>Checking Account</td>
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<td>9,875.00</td>
<td>874.46</td>
<td>42,825.47</td>
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<td>Total Operations Member Account</td>
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<td><strong>UAA History Project Account</strong></td>
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<tr>
<td>Checking Account</td>
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<td>5,338.58</td>
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<td>Savings Accounts</td>
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<td>119.21</td>
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<td>99,209.29</td>
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<td>Total History Project Member Account</td>
<td>104,428.66</td>
<td>119.21</td>
<td>0.00</td>
<td>104,547.87</td>
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<td><strong>UAA Total Bank Accounts</strong></td>
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<tr>
<td>Checking Accounts</td>
<td>39,163.51</td>
<td>9,875.00</td>
<td>874.46</td>
<td>48,164.05</td>
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<td>Savings* Accounts</td>
<td>114,873.20</td>
<td>123.19</td>
<td>33.00</td>
<td>114,963.39</td>
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<td>Total LFCU Accounts</td>
<td>154,036.71</td>
<td>9,998.19</td>
<td>907.46</td>
<td>163,127.44</td>
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</tbody>
</table>

* Includes both Main Savings and Premier Savings Accounts

2/18/2020
**ATTACHMENT B**

**UAA MEMBERSHIP AND CONTRIBUTIONS SUMMARY**  
January 1, 2020 – January 31, 2020  
(includes 2019 data for comparison)

### Registrations:

<table>
<thead>
<tr>
<th>Category</th>
<th>Quantity</th>
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</thead>
<tbody>
<tr>
<td>New alumni registrants, January 1 – January 31:</td>
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<tr>
<td>New associate registrants, January 1 – January 31:</td>
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<tr>
<td>Total new registrants, January 1 – January 31:</td>
<td>2</td>
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<tr>
<td>Total new registrants for 2019 through January 31:</td>
<td>2</td>
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<tr>
<td>Registrants whose names were removed in January 2020:</td>
<td>0</td>
</tr>
<tr>
<td>Total registrants through January 31, 2020:</td>
<td>1101</td>
</tr>
<tr>
<td>Total registrants alumni through January 31, 2019:</td>
<td>1012</td>
</tr>
</tbody>
</table>

**New registrants in January 2020:** 8

- Scott Kleinberg
- Alan Batchelder

**New associate registrants in January 2020:**

None

**Registrants whose names have been removed: deceased/unsubscribed:**

None

### Membership Contributions Summary:

<table>
<thead>
<tr>
<th>Category</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni contributions, January 1 – January 31:</td>
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<tr>
<td>Total number of contributors for 2020 through January 31:</td>
<td>153</td>
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<tr>
<td>Total number of contributors for 2019 through January 31:</td>
<td>142</td>
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<tr>
<td>% of contributors through January 2020 as compared to January 2019:</td>
<td>108.0</td>
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<tr>
<td>Total number of $100+ contributors, January 1 – January 31, 2020:</td>
<td>73</td>
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<tr>
<td>Total number of $100+ contributors for 2020 through January 31:</td>
<td>73</td>
</tr>
<tr>
<td>Total number of $100+ contributors for 2019 through January 31:</td>
<td>50</td>
</tr>
<tr>
<td>% of $100+ contributors through January 2020 as compared to January 2019:</td>
<td>146.0</td>
</tr>
<tr>
<td>Number of new contributing members, January 1 – January 31, 2020:</td>
<td>2</td>
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<tr>
<td>Total number of new contributing members for 2020 through January 31:</td>
<td>2</td>
</tr>
<tr>
<td>New contributors as a % of new registrants for January 2020:</td>
<td>100.0</td>
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Comparison over the years as of end January 2020:

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<tr>
<th>Year</th>
<th>Directory listings</th>
<th>Contributing members</th>
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<tr>
<td>2018</td>
<td>984</td>
<td>144</td>
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<tr>
<td>2019</td>
<td>1012</td>
<td>142</td>
</tr>
<tr>
<td>2020</td>
<td>1101</td>
<td>153</td>
</tr>
</tbody>
</table>

Friends of UAA: 73  
(number of * indicates number of repeat contributions from members)

John Lovaas***  
Pamela Baldwin  
David Eckerson  
Susan Malick  
Robert Jordan**  
Arthur Flanagan***  
Jonathan Sperling*****  
David Cohen  
John Westley  
Carlton Bennett  
Ted Morse  
Nancy Tumavick  
John Pielemeier  
David Shear  
Stephen Klein  
Ken Smith  
Adrienne Allison***  
Leslie Dean  
Linda Whitlock  
Wayne Nilsestuen  
Kelly Kammerer  
Emmy Simmons  
Frank Almaquen  
Stacy Rhodes  
Robert Dakan  
Letitia Butler  
David Garms  
Susan Kakesako  
Joy Riggs-Perla  
Thomas Nicastro  
Jim Holtaway  
Maureen Lewis  
Dianne Tsitsos  
Janice Weber  
Richard Blue  
Stephen Giddings  
Henry Bassford  
Peter Amato  
Mike Mcgahuey  
Harriett Destler  
Grace Kim  
James Watson  
Desaix Myers  
Malcolm Butler  
Toni Christiansen  
Barbara Bennett  
James Dunlap  
Terrence Brown**  
Douglas Sheldon  
William Garvelink  
Sean Carroll  
Aaron Williams  
Bette Cook  
James Michel  
Robert Sonenthal  
Gilbert Jackson  
Denise Rollins  
Katie Taylor  
Tim Bertoli  
Thomas Morris  
Don Pressley**  
Alexander Shakow  
Candace Buzzard  
James Smith  
Marilyn Zak  
Nancy Pielemeier  
Carol Peasley  
Margaret Neuse  
Cindy Gersony  
Carl Leonard  
Mike Crosswell  
Ann Van Dusen
New Contributing Members: 2

Alan Batchelder
Scott Kleinberg

Contributing Members: 78 (number of * indicates number of repeat contributions from members)

Polly Harrison
James Thomas Ward
Gerard Bowers
Robert Thurston
Robert Archer
David Smith
Linda Lou Kelley
Richard Burns
Joseph Ryan
Donnie Harrington
Stephen Silcox
C. David Esch
Michael Donovan
Jerry Bisson
Robert Traister**
Peter Kranstover
Jon Orourke
Barbara Ormond
Carla Royalty
Neal Meriwether
Dean Salpini
Satish Shah
Bob Emrey
Kevin Mullally
Dennis Weller
Timothy Anderson
Ronald Venezia
Susan Riley
Kathleen Hansen
Conroy
Allen Fleming
Elisabeth Kvitash-vili
Alison Rosenberg
Hilda Arellano
John Champagne
Charles North
Rick Scott
Bennett Samuels
Arthur Fell
George Ingram
Mary Kilgour
Kerry Byrnes
Glenn Post**
Carol Grigsby
Ed Butler
Richard Fraenkel
Charles Johnson
William Goldman
Allan J. Alonzo
Wind
Charles Uphaus
David Atwood
Shane Maccarthy
Harry Petrequin
James Gaughran
Margaret Healey
Roxana Rogers De Sole
Joan Silver
Marguerite Benson
William Penoyar
Clarence Zuvekas
Denny Robertson
Frank Young
John Hatch
Sharon Epstein
Jeffrey Cochrane
Kempe Hope
Jerrold Rubin
Andrew Morehead
Corwin V Edwards, Jr
Michael Deal
Kris Smathers
C Stuart Callison
Ralph Singleton
Constance Carrino
Beth Cole
Lewis Conner
William Patterson
Jeffrey Grieco
Irving Rosenthal
## UAA 2020 Operating Budget

**As Approved 2/1/20**

<table>
<thead>
<tr>
<th>Budget Categories and Items</th>
<th>2019 Budget Item</th>
<th>2019 Budget Category</th>
<th>2020 Budget Item</th>
<th>2020 Budget Category</th>
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<tr>
<td>AGM Catering Services</td>
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<td>Awardees &amp; Speaker Travel</td>
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<td>Alumni Awards</td>
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<td><strong>Sub-Total, AGM (assumes no cost at CGD)</strong></td>
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<td>Winterfest</td>
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<td>Spring Reception</td>
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<td><strong>Sub-Total, Social events</strong></td>
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<tr>
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<td>500</td>
<td></td>
<td></td>
<td>-500</td>
<td></td>
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<tr>
<td>Strengthening USAID Committee</td>
<td>1,000</td>
<td>1,500</td>
<td></td>
<td></td>
<td>500</td>
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<tr>
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<tr>
<td>Retirement Ceremony</td>
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<td>~165 participants</td>
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