



REPORT TO THE MEMBERS OF THE USAID ALUMNI ASSOCIATION (UAA) ON ACTIVITIES IN 2021

October 2021

UAA's current strategic plan 2020-2023 sets out six operational goals and relies primarily upon the Association's six operating committees to take the lead roles in addressing each of those operational goals. This report provides a summary of progress made during 2021.

UAA as a not-for-profit volunteer membership organization, relies on its' membership, Operating Committee Co-Chairs and seven-member Board of Directors to advance the specific activities articulated in its strategic plan. Overall, 2021 was a year of significant progress in a number of areas, despite the on-going challenges of operating in a COVID-19 environment. Highlights from 2021 include the following:

- Significant expansion of the Mentoring Program with USAID, with 80 mentor/mentee pairs in the 2021 cohort.
- Publication of an independent history of USAID written by John Norris, titled "The Enduring Struggle: The History of the U.S. Agency for International Development and America's Uneasy Transformation of the World".
- Introduction of UAA activities to the new USAID Administrator Samantha Power by the Board members in a virtual meeting in October 2021.
- Expanded use of a virtual platform (Zoom) for social activities (Picnic, Winterfest and Spring Reception) to engage membership both in the greater D.C. area and across the country.
- Increased UAA registered alumni by 6 percent over last year and improved communications and interactions among members through monthly newsletters, virtual professional and social events, and meetings and briefings with USAID staff, including imminent retirees and FSNs.

REPORT ON PROGRESS TOWARD UAA GOALS IN 2021

The six goals adopted for 2021-2023 and the implementation actions taken or planned during 2021 are summarized below. Member comments on these are welcomed.

Goal 1: Ascertain alumni interests on a continuing basis; expand UAA membership, including by adding new contributing members who reside outside the Washington area; increase opportunities for social events and interaction among alumni.

Lead: Membership Committee

In furtherance of this goal, the UAA Membership Committee, in collaboration with other UAA committees, undertook the following actions in 2021:

• **Expanded UAA Membership:** Successfully implemented this goal’s activities in 2021, beginning October 1, 2020 through September 30, 2021, resulting in increased UAA **registered alumni** from 1,135 to 1,200, a 5.7% increase from 2020. These registrants are USAID alumni who meet the same eligibility criteria as for membership, whether contributing financially or not to UAA, to receive UAA emails or to request listing on the

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UAA Registry directory. This increase in registrants included 413, a small 5% decrease from 437 **contributing members** in 2020, consisting of those who are eligible USAID alumni who donate annually to support UAA operations. These contributors included:

- 166, a small 2% decrease from 170 **Friends of UAA**, who are alumni wishing to make a more generous contribution of \$100 or more compared to donations of \$75 for alumni living within a 50-mile DC radius and \$25 for alumni living outside a 50-mile DC radius, outside the United States, former FSNs, and associate members; and
- Several **associate members**, consisting of widows, widowers, and former spouses and partners of USAID alumni eligible to join UAA. It is a non-voting category of membership.
- **Recruitment Activities:** Efforts included the following actions:
 - Sent tailored emails to those who newly registered without contributing, or who had previously contributed to UAA but had not yet contributed in 2021.
 - Met with USAID Foreign Service and General Schedule imminent retirees attending the Foreign Service Institute Career Transition Center seminars to inform them about the UAA, and successfully encouraged many of them to join.
 - Provided USAID Office of Human Capital and Talent Management (HCTM) senior staff the updated UAA brochure for transmission to FSNs around the world and to Executive Offices (EXOs) worldwide to share, in turn, with soon-to-rotate and already retired FSNs.
 - Met with HCTM and the elected FSN Advocacy Council, representing 4,500 FSNs around the world, and encouraged them to join the UAA.
 - Continued to hold social events virtually via Zoom throughout 18 months of the coronavirus pandemic restrictions to encourage UAA registrants and contributing members around the country and overseas to participate along with those members living in the DC metropolitan area.
 - Attracted new volunteer talent to the Membership and other Committees.
 - Explored establishing local UAA regional chapters, or “satellite hubs,” of geographic

groups of alumni living outside the DC Metropolitan area. While this effort continues to be slowed down due to the coronavirus restrictions, the Public Outreach and Membership Committees have focused on developing the organizational structure of a Regional Chapter Committee with three pilot chapters in the Northeast (Ohio), Southeast (Florida), and Mid-West (Ohio).

- **USAID Retirement Ceremony:** Coordinated with USAID Bureau for Legislative and Public Affairs the planning of a UAA and USAID co-hosted virtual retirement ceremony and in-person reception in October or November 2021 for USAID retirees who have not been recognized at such an event for the past five years. UAA will speak at the ceremony. The event will provide an opportunity for UAA to discuss its program and activities and encourage USAID retirees to join the association.
- **Expanded Access to UAA Events:** Supported continuing strong participation by alumni at UAA's broadly attended annual events, most notably the Annual General Meeting in the fall, through virtual sessions. Holding meetings virtually were necessary not only to continue the social and professional connection among UAA members, but also to

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increase participation in local UAA events by those living both within and outside the DC Metropolitan area. The results were mixed in terms of number of attendees at each event, but the participation of alumni around the world was successfully broadened. For example:

- The Winterfest social event held virtually February 14, 2021, was a highly participatory Valentine's Day gathering with 60 members and guests from around the country. The February 2020 Winterfest, held before the novel coronavirus struck, was hosted by a UAA alumnus at his home with approximately the same number of attendees, mainly from the DC Metropolitan area.
- The Spring Reception, held virtually via Zoom on May 23, 2021, had 31 attendees from not only the DMV (District, Maryland and Virginia) area, but nine other states and one foreign country. The 2020 reception was canceled due to the coronavirus pandemic. For comparison, the May 2019 Spring reception prior to the pandemic was hosted by UAA alumni at their home and drew 72 attendees, largely from the DMV .
- The Annual Picnic, planned to be held on September 19, 2021 with 60 members and guests registered to attend in person, was canceled due to a resurgence of the coronavirus delta variant. Last year's picnic on September 12, 2020 was held virtually via Zoom with 71 alumni and guests from 16 states and one country abroad.
- The Annual General Meeting is planned for October 29, 2021 and will be a virtual event, given the current status of the pandemic. USAID Administrator Samantha Power has agreed to participate in an opening "fireside chat" with the Co-Chairs or the UAA Board. Strong membership participation is expected.

- **Ascertain Alumni Interest:** Conducted, analyzed, and reported, in coordination with the AGM Committee, an Evaluation of the 2020 Annual General Meeting (AGM) to the Executive Committee. Reported on the Evaluation to UAA members in the newsletter and on the website. Data specific to each UAA Committee were shared with them. [Note: The Annual Survey of Members was not done in 2021; last one was done in 2020. Recommend a mini survey in January to March 2022 to help guide recruitment efforts by asking, inter alia, what UAA-needed skills a member may volunteer and how the member learned about the UAA.]
- **Monthly Communications by Newsletter:** Sent a monthly newsletter to the increasing number of registered alumni. The newsletter includes a calendar of upcoming events; referenced links to a greatly improved website; reports and photographs of recent Development Issues, Development Dialogue, and Book Club events; a monthly profile on the interesting post-retirement activities of one UAA member; and other noteworthy activities by the UAA Board and committees.
- **Communications System Review:** Assisted in a comprehensive communications system review and implementation of the UAA newsletter and website improvements, begun in 2020 and still underway with the appointment of a communications director to serve on the Board.

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- **UAA Awards Program:** Presented the UAA's signature annual Alumni of the Year awards at the 2020 AGM to two members, each nominated by a member and selected by the UAA Awards Committee. Two award winners have been selected for the 2021 Alumni of the Year awards that will be presented at this year's AGM on October 29 .
- **Diversity, Equity and Inclusion (DEI):** Advanced UAA DEI efforts by profiling the first FSN since 2014 in the September 2021 newsletter and on the website, with plans to actively seek more diverse candidates for profiles and award nominations in 2022-2023. For example, of the ten profiles in 2021, there was equal gender representation (5 Male and 5 Female) but disparate ethnic recognition (1 African American and 1 Asian vs. 8 White); and imbalance in category of employment (8 FS and 2 GS).
- **Highlights of New Activities in 2021 and Planned for 2022:**
Some of the new efforts in **2021** to increase UAA membership were discussed above, and highlighted below for greater focus:

- Continued to hold creative and interesting programs for virtual social events

throughout the pandemic period, with mixed results in increasing the numbers of attendees but successfully broadening the accessibility to the events by members around the country and overseas.

- Participated in meetings with USAID officials to plan a USAID retirement ceremony and reception for retirees over the past five year to be co-hosted by USAID and UAA in October or November 2021;
- Met with USAID HCTM and FSN Advocacy Council representatives of 4,500 FSNs around the world in July-August 2021;
- Profiled an FSN in the September 2021 newsletter and on the website to improve the visibility of a diverse UAA membership; and
- Attracted a second volunteer talent to the Membership Committee in 2021.

Goal 2: Maintain and enhance a continuing relationship with USAID, including management of a program to make alumni available to mentor field-based staff. Lead: Strengthening USAID Committee

- The **Mentoring Program** continues to grow and define much, but not all, of the work associated with Goal 2. Two meetings were held between UAA Board Members and Agency senior leaders (Acting Administrator Gloria Steele and the Deputy Administrator Bonnie Glick as well as their senior staff) regarding the MOU areas of engagement and support by UAA for Agency priorities. These meetings demonstrated that USAID’s senior leadership was aware of, appreciative of, and depending on UAA support in numerous program areas. The MOU continues to explore new areas of cooperation between the UAA and USAID, the Mentoring Program continues to grow, and the structure for a discussion between UAA and USAID regarding internships is taking shape.
- **The UAA-USAID MOU:**
 - Leadership and Mentoring (mentoring program below, HCTM priorities, possible support for increasing DEI in USAID): The Mentoring Program is discussed below.

The other main, but still tentative, area of conversation between UAA and USAID has related to USAID’s Diversity, Equity and Inclusion (DEI) initiative. A small group of UAA members developing UAA’s own DEI initiative met twice with USAID staff with similar objectives, but the conversations have been exploratory and preliminary. The conversations validated USAID’s efforts and discussed ideas about how UAA members may be able to stimulate career interest in USAID among specific under-represented audiences (outreach); next steps rest with USAID.

- Strategy, Program, and Activity Support (CDCS support, evaluation/policy support, new PPL priority areas):

The Development Issues Committee, collaborating with the Strengthening USAID Committee took the lead in advancing one of the initiatives outlined in the USAID-UAA MOU, Assistance to USAID's Policy, Planning and Learning (PPL) Bureau in assisting Missions with their CDCS preparation. The CDCS process continued throughout FY 2020 and by the time the MOU was finalized most Missions had completed the process. However, PPL suggested that assistance from UAA volunteers might be valuable throughout the program cycle and that UAA might therefore consider the idea of "Mission mentors." UAA solicited interest from its members in becoming such mentors and 22 alumni volunteered their services in various aspects of the program cycle. USAID in turn solicited interest of the Missions the concept of a UAA mentor and as the FY drew to a close four Missions indicated an interest. In the coming months, the interested USAID Missions will refine the type of assistance they seek and UAA and PPL will move ahead with an effort to complete several mentor "matches" as a pilot to test the concept.

- **US Public Outreach, Communications, and Education** (LPA's health-focused initiative, materials for outreach):

- UAA established a Charter to guide new US domestic Regional Chapters on a pilot

basis, for Florida (South East), New Hampshire/Vermont (New England), and Ohio (MidWest), a new Committee was authorized for the Executive Committee which would oversee the work, with a Co-Chair designated from each of the three US Regions. COVID-19 has temporarily led to the interim suspension of activities foreseen, but correspondence continues with the Co-Chairs.

- UAA broadened and deepened coordination with fellow like-minded associations concerned about US foreign assistance, including with AFSA and by providing a modest grant (gift) to the US Global Leadership Coalition's 501c3 entity. The latter has enabled UAA to be engaged more actively with USGLC during its events and interventions with US Executive Branch senior officials of the Biden Administration (such as the National Security Advisor to the President) and to be kept better informed.

○ UAA encouraged USAID HQ Bureau of Legislative & Public Affairs (LPA) to engage with UAA (i) as a sounding board for its new drafting of both video messages and PowerPoint or similar written public speaking products about US foreign assistance, which UAA Alumni could also use and(ii) as a partner in piloting renewal of Hometown Diplomats by USAID FSOs when they are on Home Leave . UAA awaits LPA to organize itself internally and within HQ on these areas, as many Biden

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administration political Administrator Discretion (AD) appointees have come on board.

• **Operations, Administration, and Staff:** Retirement Ceremony and increased FSN membership and participation in UAA:

○ AA has coordinated with both HCTM Office (former Human Resources) and with

LPA to plan for renewal of the Agency's prior practice of an Annual Retirement Ceremony. Preferably, the ceremony would dovetail with Agency plans to celebrate USAID's 60th Anniversary. A formal Scheduling Request document has been co- drafted between HQ and UAA; it is now in clearance within the Agency for submission to the Office of the Administrator, aimed for a videoconference-based on- line ceremony sometime between mid-October and mid-November.

○ UAA, at the request of HCTM, led three well-received TED-Talk sessions with the eleven members of the FSN Advocacy Council, recently elected by the 4,500 FSNs world-wide. The sessions focused upon Leadership, USG InterAgency especially at Post, and Communication. UAA proposed a few possible areas of continued collaboration and awaits response from HCTM.

• **Mentoring Program:** The continuing COVID pandemic caused some changes to the Mentoring Program this year, mainly related to how we communicate with one another, but the Program itself saw increased demand by USAID FSOs for the mentoring skills of UAA members. The Mentoring Program expanded again, nearly doubling between Cohort 9 and Cohort 10. Cohort 10 saw some 80 new mentor-mentee matches with program growth in all segments of the program: Payne Fellowship Alums, new overseas SLG incumbents, and the original target population of overseas FSOs.

○ 2021 saw the second evaluation of the Mentoring Program, undertaken by two UAA members – David Sprague and Ann Van Dusen. The Mentoring Program and the Strengthening USAID Committee is indebted to David and Ann for their willingness and ability to develop, execute, and report the evaluation findings. The key findings of the evaluation include:

- ▪ 97% of mentees contacted mentors within one month of the match, and mentoring began within one additional month for 75% of mentors
- ▪ 75% of mentors met with their mentees at least once a month
- ▪ 85% of mentees called their mentors as a very good or excellent listener and

nearly as many felt their expectations for a mentor were being met

- - 93% of mentors found the training sessions ‘extremely useful’
 - 55% of mentors spend less than 2 hours a month preparing for and engaging with

their mentee

Of course, all things can be improved, and the major areas for improvement for the Mentoring Program included:

- Improved efforts to increase the number of mentors to better meet mentee demand
- Improved coordination with other mentoring efforts undertaken by USAID
- Written guidelines for Bureau coordinators
- Better/quicker rematching if a mentor-mentee partnership fails early
- More clear expectations among mentees about what a UAA mentor can do

The full evaluation will be posted to the UAA website soon.

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○ The second significant change affecting the Mentoring Program was the agreement by USAID’s Office of the General Council (GC) that UAA Mentors were providing pro-bono support to individual USAID staff. As such, GC determined that mentors were unlikely to have a conflict of interest with USAID as a consequence of providing mentoring support to FSOs. The practical implication of this determination was that mentors would not be required to disclose the financial holdings of mentors and their family members. We were relieved by this sensible determination.

○ As always, demand for UAA Mentors exceeds our supply: we need more volunteer mentors and new ways to reach Mentors with the specific life experiences being sought by Mentees. We are exploring ways to better meet this need.

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Internships: UAA members completed a report on an expanded, agency-wide, internship program at USAID in support of the Agency’s strategy for Diversity, Equity and Inclusion. It included a history of internships at USAID and State and key questions relating to development and management of programs. It outlined six approaches that USAID might want to consider, in whole or in part, in building a stronger internship program, particularly overseas. It recommended that the USAID Administrator appoint an Internship Coordinator to lead a review of options laid out in the report and suggested

that UAA members would be available to help. The report is being considered by the UAA board and may be included as part of early discussions with USAID's new front office.

- **Assistance to PPL**

The Development Issues Committee, collaborating with the Strengthening USAID Committee took the lead in advancing one of the initiatives outlined in the USAID-UAA MOU, Assistance to USAID's Policy, Planning and Learning (PPL) Bureau in assisting Missions with their CDCS preparation. The CDCS process continued throughout FY 2020 and by the time the MOU was finalized most Missions had completed the process. However, PPL suggested that assistance from UAA volunteers might be valuable throughout the program cycle and that UAA might therefore consider the idea of "Mission mentors." UAA solicited interest from its members in becoming such mentors and 22 alumni volunteered their services in various aspects of the program cycle. USAID in turn solicited interest of the Missions the concept of a UAA mentor and as the FY drew to a close four Missions indicated an interest. In the coming months, the interested USAID Missions will refine the type of assistance they seek and UAA and PPL will move ahead with an effort to complete several mentor "matches" as a pilot to test the concept.

Goal 3: Facilitate contributions by alumni and sharing of information with respect to USAID policies and developments and trends in development cooperation. Lead: Development Issues Committee

The UAA Executive Committee welcomed a new Co-Chair to the Development Issues Committee, Stephen Haykin in November 2020, joining continuing Co-Chair Stephen Giddings, following the resignation of James Fox after five years of yeoman service to the UAA. Steve Haykin retired in 2020 after a distinguished career as Mission Director in five countries.

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- As COVID—19 restrictions prevented "in person" meetings, the Committee used the Zoom platform to hold six well attended **virtual discussion meetings** featuring one, two or three discussion leaders during the first six months of 2021. The Zoom platform enabled a much larger number of alumni from various parts of the country to participate in the discussions than was possible when the meetings were held "in-person," ranging from about 40 to over 100 attendees depending on the topic. Only contributing members to UAA are eligible to participate in the discussions. Topics and discussion leaders included:

- *January:* Former AA and current Co-Director of the Task Force on U.S. Strategy to Support Democracy and Counter Authoritarianism **Alex Their** led a discussion on governance and democratic freedoms in the era of COVID-19 and the post- election future of democracy and governance programming as a component of USG efforts to support countries on the "journey to self-reliance."

- *February*: Former AA **Emmy Simmons**, former Agricultural Officer **David Bathrick** and IFPRI's Director of Development Strategy and Governance **Paul Dorosh** led a discussion on "Sustained Poverty Reduction via Inclusive Agriculture and Rural Development," based on a recent paper by Bathrick.
- *March*: Acting USAID Administrator **Gloria Steele** led a discussion of the challenges facing USAID as the Biden administration re-calibrates foreign assistance.
- *April*: **Michele Sumilas**, recently appointed Assistant to the Administrator for USAID's PPL Bureau and several of her Office Directors provided a briefing on PPL priorities and opportunities for UAA/USAID collaboration throughout the program cycle.
- *May*: Former Mission Director **Charles North**, currently Deputy Chief Executive Officer of the Global Partnership for Education (GPE) and **Susannah Hares**, Co- Director of Educational Policy and Senior Policy Fellow at the Center for Global Development (CGD) led a discussion on the "Challenges of Transforming Education in Developing Countries through the Pandemic and Beyond."
- *June*: Former USAID Deputy Administrator **Bonnie Glick**, currently a Senior Advisor to CSIS's Project on Prosperity and Development and former DAA **Justin Finnegan**, currently Managing Director – Asia and the Pacific for Bloomberg New Economy, led a discussion on "U.S. Assistance is More Valuable than 'One Belt, One Road -- A Conversation about Competition with China."

The Committee intends to resume its series of periodic discussions on topics of interest to UAA members throughout the remainder of the year and will explore the idea of "hybrid meetings" – allowing for "in person" participation as well as virtual participation through the Zoom platform for those members living outside the D.C. metro area.

• **UAA/DACOR Development Dialogues**: UAA has traditionally organized a series of talks on a broad range of topics relevant to the interests of international development and foreign affairs professionals. These have for many years included the jointly sponsored UAA/DACOR Development Dialogues, which include both lunchtime events and less formal Monday morning conversations over coffee. Since the last Report in October 2020 eight events have been held, but due to the restrictions imposed by Covid-19 all were

done virtually. The one advantage of virtual programs has been our ability to reach a wider audience outside the Washington, D.C. area. Typically, well over 100 alumni and many DACOR members have “attended” these events. Individual event announcements are sent to all alumni on the UAA list and are publicized in the UAA newsletter and website. Audio and video for most events are posted on the UAA website. Presentations from October 2020 until September 2021 included:

- November 2020 – Former USAID Administrator **Brian Atwood** talked about “**How Development Fits into a 3-D Future Development Strategy**”
- January 2021 – Brookings Institution’s **George Ingram** spoke on “**What Should Be the Priorities for Development in the Biden Administration**”
- March 2021 – **Jerry Hyman**, former head of AID’s Democracy and Governance Office, spoke on
- *The Good American* –

“**Whither or Whether Democracy Promotion? Democracy**

Assistance, Development and Foreign Policy”

April 2021 - “**Bob Gersony in Conversation with Ambassador Rick Barton**”

Bob is the subject of a book by Robert Kaplan entitled

The Epic Life of the U.S. Government’s Greatest Humanitarian

May 2021 – Former Administrator **Mark Green** (and now President of the Wilson Center) **in conversation with George Ingram**

June 2021 – Former USAID Administrator **Andrew Natsios** (hosted by Ambassador **Jim Michel**) talks about his new co-edited book

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July 2021 – The Hon. **Greg Starr** described the main recommendations of his American Academy of Diplomacy report “**Changing the Risk Paradigm for U.S. Diplomats**” with comments by former USAID Mission Directors **Jim**

Transforming

Our World: President George H.W. Bush and American Foreign Policy.

Bever and Chris Crowley

September 2021 –

John Norris, talked about his book **The Enduring Struggle: The History of the U.S. Agency for International Development and America’s Uneasy Transformation of the World.**

Scheduling of events in collaboration with DACOR will continue as before, except that there may be in-person “hybrid” events scheduled in 2021 as DACOR began to schedule these events during the summer of 2020. Given the resurgence of Covid cases around the country this opening-up process is likely to move more slowly than anticipated.

• **UAA Book Club Reviews, Oct. 2020-June 2021:**

Copies of the reviews prepared for discussion are available on the UAA Book Club Reviews section of the UAA website. No reviews were held between March and September 2020 due to the Covid-19 pandemic. Books discussed this year to date:

- Daniel Markovits, *The Meritocracy Trap: How America's Foundational Myth Feeds*

Inequality, Dismantles the Middle Class, and Devours the Elite, 2019, was reviewed by Bobbie van Haeften via Zoom on October 21 and 28, 2020. About 12 people participated.

○ Abhijit Banerjee and Esther Duflo, *Good Economics for Hard Times*, 2019, was reviewed by Richard Blue via Zoom on December 9, 2020, with 14 participants.

○ Daniel Kahneman, *Thinking, Fast and Slow*, 2011, was reviewed by Jon O'Rourke via Zoom on January 27, 2021, with 18 participants.

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○ Bertram Levine and Grande Lum, *America's Peacemakers: The Community Relations Service and Civil Rights*, University of Missouri Press, 2020, was reviewed February 17, 2021, by Grande Lum and Neil Levine via Zoom with 20 participants.

○ Robert D. Putnam with Shaylyn Romney Garrett, *The Upswing: How America Came Together a Century Ago and How We Can Do It Again*, 2020, was reviewed by Richard Blue via Zoom on April 21, 2021, with 14 participants.

○ Raghuram Rajan, *The Third Pillar: How Markets and the State Leave the Community Behind*, 2019, was reviewed via Zoom by Bobbie van Haeften on May 26, 2021, with 12 participants.

○ Bob Altemeyer, *The Authoritarians*, 2006, was reviewed by Joe Ryan via Zoom on June 23, 2021, with 10 participants.

Goal 4 Compile and publish a readable independent history of USAID's nearly 60 years of development experience to increase understanding of USAID's accomplishments and the lessons learned that can guide current and future programs. In further support of this goal, increase the number of USAID's oral histories and build a bibliography of books by USAID authors.

Lead: History Project Committee.

In furtherance of this goal, the UAA undertook the following actions in 2021:

• USAID History Project

○ The author, John Norris, completed his manuscript by late August, 2020 and the book was published by Rowman & Littlefield on July 1, 2021. The book, entitled *The Enduring Struggle: The History of the U.S. Agency for International Development and America's Uneasy Transformation of the World*, received very positive endorsements from several former USAID Administrators and largely favorable reactions from the USAID alumni who have read the book.

- Norris completed the terms of his contract with UAA, and final payments were made to him by mid-year.
- Active efforts are underway by the History Project Advisory Committee members (Carol Peasley, Jim Michel, Dan Runde and Alex Shakow), in collaboration with the author and the publisher, to maximize awareness and distribution of *The Enduring Struggle* and its content in the United States and in the international community. Activities in pursuit of this objective have concentrated on institutions and individuals known to be interested in foreign relations, international development cooperation, and related history.
- The UAA, by terms of an addendum to the Norris contract with the publisher, pre- ordered 500 copies of the book. About 250 of these were shipped directly from the publisher to the 150 book project contributors and a further 100 were sent to influential individuals, including the 36 university department heads where development is taught, with a request that they disseminate information about the book.
- Of the remaining 250 copies, by early August about thirty were reserved for individual Congressional staff members whose brief includes AID legislation and another 20 were provided the USAID Executive Secretariat for distribution to the

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offices of key Assistant Administrators. Complimentary copies will continue to be

sent to influential recipients as the year progresses.

- Efforts to promote the book have continued through many other outlets (including,

for example, the USAID and IMF/World Bank libraries, LinkedIn, etc.) and to encourage its purchase by individuals (including at a 30 percent discount from the publisher).

- Norris has participated in virtual sessions with the ADST, CSIS, the USAID Policy and Planning staff, and a UAA/DACOR Development Dialogue and will engage with USAID alumni at its 2021 AGM in October.

- An article by Norris will appear in the November Foreign Service Journal as will a book review by UAA Board Member Jim Bever.

- Many other events, reviews and articles are contemplated as efforts have been made to include attention to the book in the programs of other relevant organizations - e.g., Academy of American Diplomacy book award, Foreign Service Institute training programs, National Museum of American Diplomacy treatment of development, and so forth.

○ Favorable reviews have thus far appeared on the CGD website and in the National Review, with others to follow. Book reviews are being solicited in other publications that are followed by readers within the target audience.

• **Oral History Project**

As noted in last year’s report, early in CY 2020, UAA worked with the Association of Diplomatic Studies and Training (ADST) to prepare a proposal to USAID for a follow-on grant to expand the number of USAID oral histories done by ADST. The \$150,000 grant to cover the costs of an additional 70 USAID oral history interviews and videos was made in September 2021. Five UAA members have volunteered to conduct the interviews.

UAA has reviewed existing oral history interviews to generate lessons learned from Diversity, Equity, and Inclusion (DEI) experience. Those lessons were passed on to the DEI Advisor within the USAID Office of the Administrator.

• **Bibliography of USAID Authors**

This extensive bibliography project added 16 more titles this year, many of them memoirs, and now totals 300 titles. New memoirs include books by Administrator Samantha Power, Ted Carter, Jay Ruoff, Alex Dehigan, Elizabeth Maguire, Hubert Addleton (Jonathan A’s father), Roy Stacy, Alonzo Wind and USAID/Kenya FSN Victor Macbayi. We have also added histories by John Norris (a must read history of USAID), John Riggs and Bill Frei, three children’s books by Deborah Bowen Llewellyn (wife of Charles Llewellyn) and current FSO Morgan Limo. Two authors of fun fiction books are hiding behind pseudonyms with the pen names of A.A. Caleb and Alex Guisee.

Responding to a request, we also prepared a compilation of “USAID in Vietnam” books (Garms, Lewin, Nighsonger, Warne and Young) and oral histories (19). We also recommended speakers (Stacy and Maguire) for the Society for International Development Writer’s Panel. Finally, we are now adding eight USAID Country Program histories.

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Although not written by a USAID author, the “Good American: The Epic Life of Bob Gersony, the U.S. Government’s Greatest Humanitarian” by Robert Kaplan is littered with citations and insightful descriptions of 24 USAID officers and mentions 12 more.

Goal 5: Expand, maintain and enhance beneficial relationships with other organizations and facilitate opportunities for USAID alumni to inform audiences and communities about development and the role of the United States and USAID. Lead: Public Outreach Committee

- UAA established a **Charter to guide new US domestic Regional Chapters** on a pilot basis, for Florida (South East), New Hampshire/Vermont (New England), and Ohio

(MidWest), a new Committee was authorized for the Executive Committee which would oversee the work, with a Co-Chair designated from each of the three US Regions. COVID-19 has temporarily led to the interim suspension of activities foreseen, but correspondence continues with the Co-Chairs.

- UAA broadened and deepened **coordination with fellow like-minded associations** concerned about US foreign assistance, including with AFSA and by providing a modest grant (gift) to the US Global Leadership Coalition's 501c3 entity. The latter has enabled UAA to be engaged more actively with USGLC during its events and interventions with US Executive Branch senior officials of the Biden Administration (such as the National Security Advisor to the President) and to be kept better informed.
- **UAA encouraged USAID HQ Bureau of Legislative & Public Affairs (LPA) to engage** with UAA:

- as a sounding board for its new drafting of both video messages and PowerPoint or

similar written public speaking products about US foreign assistance, which UAA

Alumni could also use, and

- as a partner in piloting renewal of Hometown Diplomats by USAID FSOs when they

are on Home Leave . UAA awaits LPA to organize itself internally and within HQ on these areas, as many Biden administration political Administrator Discretion (AD) appointees have come on board.

Goal 6: Assure that internal UAA systems and priorities provide effective, efficient, and transparent management of resources and services to UAA and its members.

Leads: Finance and Administration Committee and AGM Committee

- The financial management and **monthly budgeting and reporting system** established by the UAA Treasurer continues to provide sound oversight of the organization’s resources.
- The 2021 **AGM** content was planned based in part on feedback that UAA members provided on the 2020 AGM. In 2021, the meeting will be held again as a Zoom session on October 29. Samantha Power will give the keynote address, including a Q&A portion with selected board members. A panel is planned on the Covid-19 pandemic and importance of health systems strengthening and resilience. It will include panelists from

history of USAID. The AGM will also include a report from the UAA Board Co-Chairs on activities over the past year and end with the UAA Awards ceremony.

- Five UAA **Board members' terms** will end in 2021; three are eligible for second terms and have been invited to stand for re-election. Two additional UAA members were selected by the nominating committee from among those who indicated interest in serving, either in the 2020 Annual Survey or in response to an invitation to self-nominate and were confirmed by the Board to stand for election. The contributing members will vote on their re-election and the results will be announced at the 2021 AGM. One committee co-chair was replaced during the year. The board considered continuity, succession, and diversity in filling these vacancies.
- Additional hours were budgeted for the UAA's part-time **Systems Manager**, whose workload now includes assisting UAA with our extensive schedule of virtual meetings and programs.
- The **Publishing Agreement** with Roman and Littlefield for the USAID history was amended to acknowledge the role of USAID Alumni Association and specify our respective financial responsibilities. Final payment to John Norris under the UAA contract with him was made; the board also approved a bonus to him in consideration of the publishing advance to him being much less than expected. Payment for the agreed-upon 500 copies of the book to UAA was made and the books shipped and received promptly and as agreed.
- Based on our explanations for the delay in submission of the 2017 and 2018 returns, the **IRS refunded the penalties assessed plus interest**. The IRS acknowledged receipt of the 2019 990 long form return almost a year after it was mailed. The 1099s for our four payees in 2020 were issued to them and reported to the IRS. An extension of the filing date for the 2020 information return was prepared and accepted by the IRS; financial information has been provided to our tax accountant for preparation of the 2020 return.
- The **budget for 2021 revenues and expenditures** was approved by the board in December 2020 and amended following a routine review in June 2021, and again in October 2021 due to changed requirements. Reports on bank balances and on budget execution were prepared and distributed monthly to the Executive Committee.
- An initial **UAA core financial procedure** (contracting for services) has been drafted for discussion by the Board and approval and be available to the Executive Committee once finalized. To prevent conflicts between meetings, an **Executive Committee calendar** was developed and is maintained on the password-protected portion of the website by the Website Curator. No changes to the **Bylaws** were identified this year.

- Two accountants have been contacted regarding possible preparation of a **financial compilation and review** covering 2019, which will provide documentation of our financial

status at the time of change in Treasurer. Completion of this activity, possibly also including 2020 and 2021 will be a priority task for 2022.