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Description of document: U.S. Trade and Development Agency (USTDA) IQC (USTDA's Indefinite Delivery Indefinite Quantity Contract for Conferences, Workshops, Reverse Trade Missions, Training and Other Events) (aka Orientation Visit Handbook)(record undated)

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September 9, 2024

**VIA EMAIL**

Re: Freedom of Information Act (“FOIA”) request 2024-050:

Thank you for your FOIA request to the U.S. Trade and Development Agency (“USTDA”), dated or April 25, 2024, in which you asked for:

*A copy of the USTDA "Orientation Visit Handbook".*

In accordance with FOIA, USTDA has conducted a reasonable search for the requested records. All responsive records are being released in their entirety and are enclosed. No other responsive records were found.

Thank you again for your inquiry. There is no charge for processing this FOIA request. If you have any questions or would like to contact the FOIA Public Liaison, please e-mail [foia@ustda.gov](mailto:foia@ustda.gov) or call (703) 875-4357 and ask to speak with Brian Rivers or with me.

Sincerely,

*Dezie Okpalambieri*  
*D. Okpalaobieri*

Assistant General Counsel



# **IQC Events Manual**

**Attachment: D.2.1**

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## **PART I – OVERVIEW**

The U.S. Trade and Development Agency (USTDA or ‘the Agency’) helps companies create U.S. jobs through the export of U.S. goods and services for priority development projects in emerging economies. USTDA links U.S. businesses to export opportunities by funding project preparation and partnership building activities that develop sustainable infrastructure and foster economic growth in partner countries. Toward this end, the Agency funds various forms of technical assistance, feasibility studies, pilot projects, training, reverse trade missions, conferences and business workshops.

USTDA’s strategic use of foreign assistance funds supports sound economic policy and decision-making in host countries, creating an enabling environment for trade, investment and sustainable economic development. Operating at the nexus of foreign policy and commerce, USTDA is uniquely positioned to work with U.S. firms and partner countries to support job creation in the United States. The Agency’s mission represents a win-win scenario: helping U.S. businesses increase exports, thereby creating new U.S. jobs, while supporting infrastructure development goals in partner countries. In carrying out its mission, USTDA focuses on sectors where U.S. companies have leading technologies and services to offer, including the agribusiness, energy, healthcare, information and communications technology (ICT), and transportation sectors.

Reverse trade missions (RTMs), conferences, workshops, business briefings, trainings and other events all play an important role in USTDA’s mission. Through RTMs, USTDA brings foreign project sponsors, officials and other decision-makers to the United States to observe the design, manufacture and operation of U.S. products and services that can advance their developmental goals. Additionally, USTDA hosts or supports conferences and workshops, which tend to be sector or region-specific events designed to showcase U.S. goods, services and technology to foreign buyers.

The USTDA IQC Events Manual is a tool to standardize the planning and execution of every IQC activity. Although this Manual focuses on RTMs specifically, the practices and procedures described herein shall be used for other USTDA-sponsored events including conferences, workshops, business briefings, trainings and outreach activities, as required by the Agency. Guidelines for specialized events will be included in the individual Task Order.

# SECTION - A - HOW TO USE THE IQC EVENTS MANUAL

## Contents and Organization of the IQC Events Manual

The body of the IQC Events Manual (Manual) is organized into three sections and six annexes.

Part I, Sections A-C	USTDA and the Program
Part II, Sections A-H	USTDA Procedures and Practices
Part III, Sections A-B	Reference Section (Financial Procedures, Forms)
Annex I	RTM Checklists
Annex II	RTM Outline
Annex III	Guide to Interpretation/Translation
Annex IV	Final Reimbursement Invoice Template and Guidance
Annex V	Template for Final Report (Confidential Version)
Annex VI	Template for Final Report (Public Version)

Insurance contact information and current prevailing insurance rates are specified in Part II, Section F.6 of this Manual. Users of this Manual are required to check with USTDA periodically to ensure that the information provided is still current.

### A.1 Suggestions for Effective Use of the IQC Events Manual

Read the Manual thoroughly, understand the requirements contained in the Manual, and use it as a reference as appropriate.

Use the RTM Checklist (Annex I) as a day-to-day guide.

Use forms in Part III, Section B, for official USTDA requests.

### A.2 USTDA Task Orders

To simplify the Manual, the words “Contractor” and “Task Order” have been used throughout this Manual as all-encompassing terms for the agreement between the party responsible for completing the deliverables and carrying out the duties under an RTM, conference, workshop, training or other event and USTDA.

Payment to a Contractor may be on a “fixed price” and/or “reimbursement” basis. Under a “fixed price” agreement, a Contractor will be paid the amount set for the fixed price, regardless of the costs actually incurred. Under a “reimbursement” agreement, a Contractor will be reimbursed for actual costs incurred, based upon a budget agreed upon prior to signing the agreement/Task Order. Each Task Order



under the IQC may contain a combination of “fixed price” and “reimbursable” payment requirements.

### **A.3 Glossary of Terms Used in the IQC Events Manual**

ACOR	Alternative Contracting Officer's Representative (ACOR, typically a designated country manager). Delegated authority is limited to what is outlined in the ACOR Designation Letter. An ACOR assists in the technical monitoring or administration of a contract. An ACOR has no authority to execute contract modifications or to direct or encourage the contractor to perform work that should be the subject of a contract modification. Additionally, no Government personnel other than the Contracting Officer shall act in a manner as to cause the contractor to believe that they have authority to bind the Government.
Conferences and Workshops	Conferences and workshops connect U.S. firms with foreign project sponsors. These sector, country or region-specific events are designed to showcase U.S. goods, services and technology to foreign buyers. U.S. firms also have the opportunity to meet one-on-one with foreign project sponsors. These events provide U.S. companies with an understanding of U.S. government programs and the role they can play in supporting increased exports, from advocacy support to export financing options.
Contractor	Company, which by contractual agreement, provides logistical and substantive work for USTDA in arranging an event such as a Reverse Trade Mission, Conference, Workshop, Training, etc.
Country Manager	The USTDA official who serves as the Contracting Officer's Representative or Alternative Contractor Officer's Representative, under the supervision of a Regional Director, and, as Contracting Officer's Representative, oversees the USTDA event
CO	Contracting Officer. Only the Contracting Officer has the authority to enter into, administer, or terminate contracts and make related determinations and findings.
COR	Contracting Officer's Representative (COR, typically a designated country manager). Delegated authority is

limited to what is outlined in the COR Designation Letter. A COR assists in the technical monitoring or administration of a contract. A COR has no authority to execute contract modifications or to direct or encourage the contractor to perform work that should be the subject of a contract modification. Additionally, no Government personnel other than the Contracting Officer shall act in a manner as to cause the contractor to believe that they have authority to bind the Government.

Country of Delegation	The country or countries from which a foreign delegation to a USTDA event originate. Country of Delegation, Host Country and Partner Country are used in this Manual interchangeably.
DBA Insurance	Defense Base Act Insurance - Workers' compensation insurance is required of all Contractors conducting business overseas on behalf of the U.S. Government
Delegate (s)	Foreign individual(s) participating in a Reverse Trade Mission or other USTDA events
Economic Officer	The Economic Officer employed by the U.S. State Department at a U.S. Embassy/Consulate
Event Manager	USTDA official responsible for managing and coordinating events in a particular region of the world.
Program Evaluation Manager	USTDA official(s) charged with evaluating the results of USTDA activities
FAR	Federal Acquisition Regulation - The federal regulations which govern federal government procurements
Feasibility Study	An evaluative study or early investment analysis funded by USTDA
Final Report	The final report on the event produced by the Contractor for USTDA

FSN	Foreign Service National or locally employed staff (also known as LES) at a U.S. Embassy/Consulate
GPI	USTDA's Global Procurement Initiative
GPO	Government Printing Office
Interpretation	The conversion of the spoken language of a person into the spoken language of another person
IQC	USTDA's Indefinite Delivery Indefinite Quantity Contract for Conferences, Workshops, Reverse Trade Missions, Training and Other Events
Itinerary	The overall logistical program of a Reverse Trade Mission or other USTDA event.
Other Events	USTDA undertakes other events necessary to connect U.S. firms with overseas export opportunities, including potentially roundtable meetings for U.S. industry and foreign project sponsors, conducting advance work for high level visitors from USTDA countries, and providing support to high level events being organized by other U.S. Government entities.
Performance Work Statement	Description of work to be performed under the Task Order to successfully complete a Reverse Trade Mission or other USTDA event undertaken by a Contractor
POC	Point of Contact
Regional Director	USTDA official who manages USTDA activities in a specified area of the world and who supervises USTDA Country Managers
RFP	Request for Proposals

RFQ	Request for Quotations
RTM	Reverse Trade Missions bring foreign project sponsors, officials and others to the United States to observe the design, manufacture, demonstration and operation of U.S. products and services that can potentially help them achieve their developmental goals. The ultimate goal of the Reverse Trade Mission is to deliver development assistance and enable the eventual procurement of goods and services from the United States.
Schedule	When used in the noun form throughout this Manual the term refers to the list or schedule of deliverables within the Task Order.
Sector	Industry that is targeted for a Reverse Trade Mission, Conference, Workshop, Training or Other Event (for example, energy and power, telecommunications, or health care)
Task Order	Individual orders issued under the IQC for services and/or supplies within the Performance Work Statement, issued within the period of performance, and within the maximum value of the contract. Please note that a single task order may include multiple Reverse Trade Missions, Conferences, Workshops, Training or Other Events.
Task Order Rate Chart	Projected costs for services and/or supplies to fulfill a Task Order.
Training	In support of U.S. businesses, USTDA provides training for foreign decision makers to support the sale of U.S. equipment and services overseas. Training can take place in either the United States or host country and it typically focuses on technology or regulatory requirements, or capacity building in order to give project sponsors a better understanding of U.S. capabilities and expertise related to a procurement

opportunity.

Translation	The conversion of a written document from one language to another language
USTDA	United States Trade and Development Agency (also referred to in this Manual as “the Agency”)
U.S. Flag Air Carrier	Airline holding a certificate of public convenience and necessity issued by the U.S. Secretary of Transportation under 49 USC 41102. See also 49 USC 40118 (The Fly America Act).
U.S. Participant	A U.S. individual, corporation or organization participating in the itinerary of an RTM or other USTDA event.
USCS	United States Commercial Service - An organizational entity in the U.S. Department of Commerce
USG	United States Government
USTDA Eligible Country	Any developing or middle-income country that is eligible to receive USTDA assistance
USTR	Office of the United States Trade Representative
Washington Embassy	The permanent diplomatic mission of a country to the United States

## **SECTION - B – INTRODUCTION**

### **B.1 The U.S. Trade and Development Agency**

Activities of USTDA cover a wide range of programs designed to support job creation in the United States and infrastructure development in partner countries. These include: (1) technical assistance and training; (2) feasibility studies and pilot projects; (3) conferences and workshops; (4) RTMs for delegates, and (5) other USTDA events. Specifically, trainings, conferences, workshops and RTMs provide opportunities for Contractors to assist USTDA in the coordination of both the substantive and the logistical components of these very important Agency events.

USTDA's experienced and dedicated staff is the cornerstone of its success, but the Agency cannot fulfill its mission alone. At every level, USTDA relies on U.S. businesses to provide the Agency with technical expertise.

USTDA events cover a wide range of economic sectors that represent significant U.S. export potential or policy impact, including:

- Agribusiness
- Energy
- Healthcare
- Information and Communications Technology
- Transportation

USTDA also works in other sectors where specific projects advance the Agency's mission including water and the environment. In addition, through its Global Procurement Initiative: Understanding Best Value (GPI), USTDA assists public officials in emerging economies to better understand the total cost of ownership of goods and services for infrastructure projects. The GPI helps public procurement officials establish practices and policies that integrate life-cycle cost analysis and best-value determination in a fair, transparent manner.

USTDA also develops activities specifically designed to support broader U.S. government (USG) initiatives and priorities.

### **B.2 Organizational Structure of USTDA**

Regional Directors are responsible for USTDA programs. Within each region, Country Managers and Event Managers are assigned to oversee USTDA activities in specific countries. Unless otherwise specified in a COR Designation Letter, the Country Manager assigned to the country or region will be designated as the COR for RTMs and other USTDA events.

### **B.3 USTDA Programs**

Although USTDA supports a number of program activities, this Manual focuses primarily on the standards, processes and procedures for conducting RTMs. These same standards, processes and procedures will apply to conferences, workshops, training and other events unless otherwise specified in the Performance Work Statement (PWS). Additional standards, processes and procedures specific to conferences, workshops and training are listed in Part I, C.6 of this Manual.

USTDA's intent is to introduce the delegates to U.S. equipment and technology and U.S. private sector capabilities and best practices, with the ultimate goal of enabling the eventual procurement of goods and services from the United States and supporting infrastructure development goals in partner countries.



## SECTION C: USTDA EVENTS

### C.1 The Purpose of the IQC Events Manual

The primary objective of a Contractor under this IQC is to coordinate both the substantive and logistical portions of an RTM or other event. This Manual reflects USTDA practices and procedures on issues frequently encountered during events.

### C.2 Factors Relevant to the Budget for a USTDA Event

The following factors shall be considered when preparing an RTM or other USTDA event budget:

#### Fixed Costs/Prices

a. Direct Labor: Skill level and hours required at all stages of an RTM or other event. Labor rates shall be fully burdened rates (including all benefits, overhead, etc.) and shall not exceed the rates awarded in your IQC.

b. Fixed Other Direct Costs:

Some of the other direct cost (ODC) items shall be proposed and paid as part of the agreed upon/awarded fixed price of the event. This shall include any required Industry Specialists. These items may also include:

• Briefing, Conference, and/or Training materials	•
• Ground transportation	• Photographer
• Interpreter labor and equipment costs	• Marketing and promotion costs
• Business Briefing / Conference meal	

**Note that some of these items (e.g. Ground transport, interpreter equipment, meals, photographer) could be included as a reimbursable expense depending on the specific nature of a particular event.**

#### Reimbursable ODC

Reimbursable Items: Some ODCs are reimbursed at cost. They shall be estimated by the Contractor when submitting a proposal and if allowable and allocable, may be reimbursed by USTDA based on actual costs incurred. Thus, no fee or profit shall be applied to these costs. These items may include:

<ul style="list-style-type: none"><li>• Domestic and international airfare</li></ul>	<ul style="list-style-type: none"><li>• Airline and baggage fees</li></ul>
<ul style="list-style-type: none"><li>• Lodging including any taxes</li></ul>	<ul style="list-style-type: none"><li>• Visas</li></ul>
<ul style="list-style-type: none"><li>• Meals associated with the event</li></ul>	<ul style="list-style-type: none"><li>• Airport taxes and fees</li></ul>
<ul style="list-style-type: none"><li>• Protocol gifts</li></ul>	<ul style="list-style-type: none"><li>• Insurance (DBA and medical evacuation)</li></ul>
<ul style="list-style-type: none"><li>• Phone, fax and copies, associated with the event</li></ul>	<ul style="list-style-type: none"><li>• Per Diem as required for Contractor personnel only</li></ul>
<ul style="list-style-type: none"><li>• Facilities for Business Briefings including any required A/V equipment</li></ul>	<ul style="list-style-type: none"><li>•</li></ul>

### **C.3 Sponsorship**

The Contractor shall determine, in consultation with USTDA, to what extent the Contractor will actively seek sponsorship from U.S. participants interested in meeting with the delegation, as well as cost sharing from the home country or countries of the delegation.

All cost sharing or sponsorship activities or requirements are subject to USTDA's due diligence process and prior USTDA approval. Contractors may propose sponsorship for any required reimbursable item. Any cost sharing or sponsorship guarantees shall be identified in the Fixed Price portion of the Contractor's Task Order Rate Chart.

### **C.4 Participation Requirements**

The Contractor is advised that participation at and/or sponsorship of an event held in the United States is limited to U.S. individuals, U.S. firms, or U.S. consultants, in order to fulfill USTDA's mandate to promote United States private sector participation in development projects and provide opportunities for the use of United States exports. Unless otherwise directed by USTDA, the Contractor shall include the paragraph below in all RTM/Conference/Workshop event marketing materials.

Participation at and/or sponsorship of a USTDA event is limited to invited guests from USTDA eligible countries and U.S. Individuals, U.S. Firms or U.S. Consultants in order to fulfill USTDA's mandate to promote United States private sector participation in development projects and provide opportunities for the use of United States exports. Note that by registering for USTDA events, your contact information will be provided to USTDA. In addition, please be informed that you will likely receive requests for information related to your participation in USTDA events and their outcomes via email or telephone from USTDA's Program Monitoring and Evaluation Office (M&E Office) or contracted evaluators. The Contractor is advised that individuals or organizations that are excluded in the U.S. Government's System for Acquisition Management (SAM), located at <https://sam.gov>, may not attend or sponsor USTDA events.

For overseas events, the Contractor is also advised that individuals or organizations that are excluded in SAM, located at <https://sam.gov>, may not attend or sponsor overseas USTDA events.

#### **Event Registration**

The Contractor shall use a secure, online electronic means to capture registration information for individuals attending the event. Several cloud-based services exist to allow for simplified and secure registration management. These same services

also provide a means to securely capture credit card information, should an event include fees (e.g. entrance fees). Accepting personally identifiable information, as well as credit card information, via e-mail or fax is not an acceptable method for completing event registration. Contractors should select a method that protects the information of attendees.

## **C.5 Reverse Trade Missions**

RTMs bring foreign project sponsors, officials and others to the United States to observe the design, manufacture, demonstration and operation of U.S. products and services that can potentially help them achieve their developmental goals.

USTDA's intent is to introduce the delegates to U.S. equipment and technology, as well as U.S. private sector capabilities and best practices, with the ultimate goal of delivering development assistance and enabling the eventual procurement of goods and services from the United States. The RTM agenda may include training.

In some cases, RTMs include meetings with U.S. government agencies and departments to familiarize foreign delegates with the U.S. legal and regulatory framework for a particular sector or industry. Generally, RTMs are scheduled to coincide with upcoming procurement decisions faced by foreign governments, but they can be held at any point in time.

RTMs typically last 7-14 days, and involve the travel of approximately 6-20 foreign delegates (which may also include high-level delegates), visits to a number of sites within the United States, attendance at various meetings with U.S. industry, attendance at business briefings and trade fairs, and return travel to the host country.

## **C.6 Conferences, Workshops and Training**

The PWS for a given event will provide additional detail/requirements regarding a planned event.

**Conferences and Workshops** – Conferences may be located within the United States or overseas in a USTDA-eligible country (unless otherwise specified). Conferences typically are larger events (200 or more attendees) that take place over two to three days, and will typically involve one or more receptions, keynote speeches, panel discussions, and one-on-one meeting opportunities. Workshops are typically one to two-day events with attendance ranging from 50-150. USTDA will typically pay for the travel, lodging and meals of some invited delegates from host countries and provide such delegates with complimentary attendance. Please consult the specific Task Order for the expectations regarding the provision of delegate travel. For example,

for some Conferences or Workshops, USTDA will pay for the travel, lodging and/or meals of a specific number of host country delegates, but the remainder will need to pay for their own travel, lodging and meals.

The Contractor shall be responsible for organizing and implementing a successful Conference or Workshop, which includes the substance of the information presented in the Task Order, the caliber of the speakers and panelists, and all of the logistics which go into an event of this type. The Contractor is generally responsible for ensuring safe travel to the event unless the Task Order directs otherwise. Marketing and promotion, signage and branding, simultaneous interpretation from booths, information to moderators and agenda are very important at these events and require significant planning. The Contractor shall ensure regular and detailed communication with event participants, particularly high-level participants, leading up to the event to provide for a professional-level event that reflects well on USTDA and the U.S. Government broadly. For example, participants seated at the head table should be informed in writing and directed to the head table. Conferences and Workshops may also require additional travel by the Contractor to the selected venue prior to the event for planning purposes.

The Contractor may be required to travel to foreign countries to research and identify projects to be included in project resource guides. A typical project resource guide includes information on specific projects discussed at the Conference or Workshop, providing a profile of the project, its background, technical and timing status, political/governmental support, and critical personnel for the project. Examples of briefing books or project resource guides are available, upon request and without cost, from USTDA's library at 703-875-4357 or [library@ustda.gov](mailto:library@ustda.gov). If there is a separate contract for technical expertise to produce the project resource guide, the two Contractors shall work together to provide the substantive information presented, as well as to secure high caliber speakers and panelists to ensure the technical success of the Conference or Workshop.

**Training** – Training may be located within the United States or overseas in a USTDA-eligible country (unless otherwise specified). Training events may range from one day to multiple days but will typically not exceed two weeks. Development of suitable training materials, management of presentations by trainers, translation of materials and simultaneous interpretation are critically important for Training. Please consult the specific Task Order for the expectations regarding the provision of training. For example, some Task Orders will require the Contractor to provide qualified experts to provide training while others will require the Contractor to coordinate with U.S. firms, institutions and/or U.S. Government partners who will provide training.

**Virtual and Hybrid In-Person/Virtual Events** – Any of the above-mentioned Conferences, Workshops or Training could be held in-person, via virtual meeting (“virtual event”), or by a hybrid of an in-person event coupled with a virtual meeting

("hybrid event"). Please consult the specific Task Order to determine USTDA's expectations for the event.

When organizing a virtual or hybrid event, factors to consider include whether the host country delegates would be able to participate in a remote training (including connectivity constraints), the time difference between the U.S. and host country, and whether the objectives of the Conference, Workshop or Training could be met via virtual meetings, trainings and/or webinars. For a virtual or hybrid event, the Contractor will be responsible for arranging a web-conferencing/virtual training platform(s). If interpretation/translation is required, the Contractor will ensure that the web-conference/virtual training platform(s) has/have interpretation/translation capabilities. The Contractor will consult with USTDA and other U.S. government partners as to the capabilities and needs for the web-conferencing/virtual training platform, such as a course website and online training materials. Please see *Virtual Platform* below for more details on platform requirements.

For hybrid events, the Contractor will be responsible for organizing all aspects of the event, including the in-person event and the virtual meeting. The Contractor will pay particular attention to integrating the virtual meeting participants into the in-person portion of the event. The Contractor will ensure that the registration list clearly denotes which participants are attending in-person and which participants are attending virtually.

#### *Virtual Platform*

The Contractor must propose at least one web-conferencing/virtual meeting platform for each Conference, Workshop or Training and will be responsible for obtaining and managing the platform. The Contractor will consider compatible platforms for all federal and commercial entities to participate, taking into account federal cybersecurity and IT standards. USTDA reserves the right to use platforms that best benefit the Agency's operations and mission; the requirement for the Contractor to use its own platform may be subject to change per the COR's request should USTDA choose to use its own platform to host virtual training. The Contractor should anticipate this possibility with no additional cost to the government. The platform should ensure maximum audio-visual quality and ease of use by participants in all locations, taking into account the need for remote simultaneous interpretation and the objectives of the Activity. The Contractor will select a platform(s) for this Activity that facilitate(s) video/voice, including voice over IP and toll-based phone options for participants and presenters, and content sharing tools, including desktop, PowerPoint, and presentation sharing. The Contractor will test the platform before each virtual or hybrid event to ensure functionality and connectivity, and will endeavor to have all speakers test using the platform in advance of the event.

Below are the kinds of features that USTDA may require from a web-conferencing/virtual meeting platform. Any features that USTDA requires shall be user-friendly and easily accessible for all participants:

- Capacity for up to 200 individuals to login as active participants unless the Task Order specifies otherwise;
- Option to use a web camera or external equipment (i.e. microphone or standing video camera);
- Ability for all presenters to access and practice event as a “test run” before the event formally starts;
- Ability to change between presenters;
- Capability for simultaneous interpretation;
- A chat window for Q&A;
- Breakout rooms;
- Poll and survey tools;
- Event analytics and reporting, including follow-up and evaluations involving feedback from the participants;
- Ability to record (controlled by the Contractor) and provide link to event for later hearing/viewing;
- Ability for the Contractor and/or USTDA to mute participants and manage engagement during the event (e.g., the ability to remove participants if necessary);
- Ability to download event recording to save recordings locally; and
- Hosted registration pages and built-in email marketing support, including customized branding for virtual event email invites, registration pages, and on the event page itself.

#### *Virtual Platform Security Requirements*

The Contractor must consider the following security requirements for any virtual platform used under this task order.

- Implementation of end-to-end encryption;
- Strong, well-known, testable encryption standards;
- Multi-factor authentication (MFA) to validate users’ identities;
- Oversight and control for who connects to collaboration sessions;
- Privacy policy prohibiting the vendor to share data with third parties or affiliates;
- Secure deletion of data from the service and its repositories as needed;
- Reviewed or certified for use by a security-focused nationally recognized or government body; and
- Not developed and/or hosted under the jurisdiction of a government with laws that could jeopardize the Federal government’s official use.

Please consult the Task Order for any additional, event-specific web-conference/virtual meeting platform requirements.

## **C.7 Reimbursable Expense**

In accordance with your contract terms, allowable costs associated with required Contractor and Delegate travel approved by the Contracting Officer's Representative (COR) or Alternate Contracting Officer's Representative (ACOR), shall be compliant with the Federal Travel Regulations (FTR), General Services Administration (GSA) per diem rates, and Department of State's Standardized Regulations (DSSR), as applicable. These Other Direct Costs (ODC) will be reimbursed at actual cost. Thus, no fee or profit shall be applied against these costs.

In accordance with FTR §301-11.4, you may be reimbursed at per diem or for the actual costs, not-to-exceed (NTE) the per diem rates allowed by GSA, but only one method is allowed per invoice. As Agency requirements may be more stringent than those of the FTR, it is at the discretion of the CO managing the contract which method is required and this direction may change as needed with performance.

In accordance with FTR §301-11.25, receipts are required for lodging and any expense over \$75. However, it is at the discretion of the COR/ACOR to request receipts for ODC of any amount, even for expenses under \$75. If a required receipt cannot be provided, you must provide a reason acceptable to your COR explaining why you were unable to furnish the receipt and provide certification from your firm that the cost was required, expensed in direct support of the subject contract, and occurred during the travel dates indicated.

For expense certification: "I certify that the expense listed incurred in direct support of the subject contract and was paid for in full." Please provide the following with the certification: expense description, cost, date incurred, method of payment, and reason why receipt is unavailable.

The Government will determine the allowability, allocability (assignable or chargeable to one or more cost objectives on the basis of relative benefits received or other equitable relationship), and reasonableness (does not exceed that which would be incurred by a prudent person in the conduct of competitive business) based on Subpart 31.2.

The Government may request supporting information during the invoice verification process. Per FAR 31.201-2(d), the Contractor is responsible for maintaining records, including supporting documentation, adequate to demonstrate that costs claimed have been incurred, are allocable to the contract, and comply with applicable cost principles.



Contractors are expected to exercise the same care in incurring expenses charged to a Government contract that a prudent person would exercise if traveling on personal business and expending personal funds. Excess costs, circuitous routes, delays, or luxury accommodations and services unnecessary or unjustified in the performance of the Task Order shall be unallowable. Contractors will be responsible for excess costs and any additional expenses incurred for personal preference or convenience.

Allowable and allocable costs incurred for lodging and meals (as defined in the FTR, DSSR, the GSA, and/or other applicable regulations or bodies) shall be considered to be reasonable only to the extent that they **do not exceed on a daily basis the maximum per diem rates in effect at the time of travel** as set forth in the GSA (for travel in the contiguous United States) and the DSSR, Section 925: Maximum Travel Per Diem Allowances for Foreign Areas (for travel in areas outside the United State) without the express authorization of the Contracting Officer.

Wi-Fi: Should a hotel the RTM delegation stays at not provide complimentary Wi-Fi to guests, the Contractor may obtain and incur costs for Wi-Fi for the Contractor and RTM delegation, for reasonable business use.

#### **C.7.1 Ground Transportation**

The use of taxicabs is permitted while the Contractor is on official travel for USTDA. Taxi hire is appropriate when:

- Public transportation, airport limousine service, and/or hotel courtesy transportation is not available or when time or other factors make it impractical to use available public conveyances.
- Traveling between transportation terminals and the hotel or office while in an official travel status.

Transportation for trips used to obtain meals will not be reimbursed. Reimbursement for actual fares (plus no more than 15% tip) will be made only if an appropriate receipt is submitted with the voucher.

#### **C.7.2 Non-Reimbursable Expenses**

Examples of expenses that will not be reimbursed include the following:

- alcoholic beverages, entertainment;
- laundry, dry cleaning, and pressing;
- travel insurance (excluding Defense Base Act (DBA) and

Medical Evacuation for Contractors travelling overseas);

- parking fines;
- charges incurred because of indirect travel for personal reasons;
- any charges, fees, or other associated costs related to the making of reservations or other accommodations for travel; or
- other expenses deemed by the Contracting Officer as unallowable for reimbursement.

**PART II – RTM PRACTICES AND PROCEDURES**

## **SECTION A: SELECTING THE DELEGATION**

### **A.1 Responsibilities of Participants in the RTM Program**

#### **Contractor Responsibilities**

- Comply with all USTDA policies and procedures.
- Provide a proposal, which fully describes how the Contractor shall meet USTDA's PWS requirements. Comply with all USTDA policies and procedures.
- When requested by USTDA, assist with foreign delegate selection.
- Arrange for and supply all transportation involved in the RTM.
- Build a rapport with the delegation.
- Be attentive to cultural, religious and dietary requirements.
- Accompany the delegation throughout the itinerary, with at least two Contractor professionals present on all substantive days (days with meetings, events or site visits) and at least one Contractor professional at all times and assist with all reasonable requests identified by the delegation. Contractor shall effectively manage the moving of the delegation through the itinerary to ensure safe, reasonable and appropriate travel arrangements. For a virtual or hybrid event, the Contractor will staff the event and manage run of show.
- Serve as a liaison among all entities to facilitate a smooth and productive event.
- Brief U.S. companies and site visit hosts sufficiently in advance of meetings with the delegation so that the companies can prepare appropriately tailored presentations and site visits. Briefing information shall include the purpose of the visit, the delegation list including their roles, background of the projects being pursued by the delegates, and any other pertinent information that will facilitate the most effective and constructive meetings possible.
- Ensure the appropriateness and quality of all arrangements, including business briefings, hotels, conference facilities and materials.
- In coordination with USTDA's Office of Public Affairs ("Public Affairs"), develop a marketing methodology and produce professional-quality materials for U.S. business participation. These materials shall be shared and approved by Public Affairs. Promotion of the event shall be coordinated with the COR/ACOR and Public Affairs, utilizing social media and newswire services, when appropriate.
- Submit a draft signature banner, which clearly identifies USTDA as the official delegation sponsor, for USTDA approval within one week of signing the contract. The Contractor is required to use the approved signature banner for all email correspondence related to the event.
- Include a USTDA brief (which the Country Manager or Public Affairs will provide) with initial correspondence to all U.S. companies with whom the delegation might be meeting. This USTDA brief shall provide U.S. companies with an overview of USTDA as well as clearly identify USTDA as the official delegation sponsor.

- Provide properly labeled photos that are suitable for event promotion, social media and post-event publication purposes.
- Provide complete records and reports as described in the Task Order in a timely manner.
- Continue cooperation with USTDA's program evaluation process on the results (or outcomes) of the RTM as describe in this Manual or otherwise requested.
- Coordinate with local partners including the Commerce Department's U.S. Export Assistance Centers and Minority Business Development Centers, USTDA's Making Global Local partners, and SBA's Small Business Development Centers, as appropriate.

The Contractor is responsible for successfully executing the event. The Contractor may utilize local subcontractors, for example to carry out the in-person portion of a hybrid event hosted outside the United States. The Contractor shall include local USTDA partners in planning the event as early as possible, typically following the kick-off meeting between the Contactor and the COR and ACOR, in order to facilitate participation by the local partner and its membership. To the extent that the local partner is willing to actively promote the USTDA event, the Contractor shall coordinate with Public Affairs to develop social media tool kits or other relevant tools to facilitate local partner outreach and marketing efforts.

### **Delegation Responsibilities**

- Identify the head of the delegation.
- Provide the mission statement with project background to Contractor, if applicable.
- Present information on project opportunities and project financing.
- Participate in the planning of the RTM.
- Participate fully in the planned itinerary.
- Include decision-makers as delegates.
- Be prepared to provide information, presentations and briefings to U.S. participants.
- Respond, in a timely manner, to USTDA requests for follow-up information

### **U.S. Participant Responsibilities**

It is desirable for U.S. participants—businesses, government representatives and organizations— to contribute to the success of RTMs by assuming the following responsibilities.

- Provide Contractor with corporate and product/service overview.
- Guarantee a level of executive participation equal to or greater than the level of the delegation.
- Thoroughly brief the U.S. participant's presenters on the mission of the RTM.
- Provide a list of meeting participants and agenda to the Contractor at least 5

- days prior to appointment with the RTM delegates.
- To the extent practicable, participate in sponsorship to support delegates' visit (e.g., meals, presentations, transportation, hotel, tours, and/or other appropriate entertainment).
  - Follow-up with the delegation on any potential business opportunities.
  - Respond, in a timely manner, to USTDA requests for follow-up information.

## **A.2 Initial Planning - The First Steps**

### **Kick-Off Meeting**

At the start of any Task Order, the Contractor shall meet with the following USTDA representatives to be briefed on the RTM status and USTDA objectives:

- The USTDA Country Manager COR and any ACORs
- The USTDA Office of Public Affairs
- The USTDA Program Evaluation Manager

Topics of discussion shall include:

- Mission of the RTM
- Scheduling
- Delegation Composition
- Interpretation
- Scheduling
- Sponsorship
- Political Factors
- Government Relations
- Role of the FSN/LES/Commercial Officer
- Measurable and/or Demonstratable Objectives of the event
- U.S. Participants, including outreach to domestic USTDA partners
- Media Plan – including social media outreach and ongoing engagement strategy
- Marketing/promotion plan, social media engagement and collaboration and materials

### **Invitation Letter**

The Contractor shall prepare a draft invitation letter to the delegates for USTDA approval. Processing instructions for the invitation letter are discussed fully in Communications & Correspondence, Part II, Section D.8.

### **A.3 Delegation Selection**

Delegation selection may be specified by USTDA as a responsibility of the Contractor. However, delegates are usually determined by a combination of the following:

- The U.S. Embassy/Consulate in the specified country (typically, the Commercial Service or the Economic Section) will recommend delegation members.
- The head of the delegation may help select the delegates.
- USTDA invites specific entities and the entities nominate delegates.
- U.S. industry representatives will provide the names of potential delegates based on the representatives' familiarity with the industry and the objective of the particular RTM.

### **A.4 Screening of RTM Delegates**

USTDA, with the help of the local U.S. Embassy/Consulate, will review and approve the final delegation list.

USTDA will conduct a due diligence process for each individual delegate and the organization that they represent. Attendance in the event is subject to USTDA approval upon the conclusion of such due diligence process.

#### **Role of the U.S. Embassy/Consulate Staff**

In addition to recommending individual delegates, the Contractor may, only if directed by USTDA, ask an appropriate U.S. Embassy/Consulate official to comment on a proposed list of delegates.

#### **Survey Trip to Country of Delegation**

If provided for in the Task Order PWS, a Contractor will travel to the host country to: meet the prospective delegates for the RTM; review the delegation list; refine the objective of the RTM; and consult with the U.S. Embassy/Consulate about local issues.

NOTE: The Contractor is required to obtain DBA Insurance-Worker's Compensation and Medical Evacuation Insurance if travel to the host country is authorized. (Please refer to Insurance Part II, Section F.6.)

The Contractor shall brief the Task Order COR/ACOR within one week after the trip has concluded. The Task Order COR/ACOR shall be informed in writing of any changes in the make-up of the delegation at all times during the course of the RTM.

## **A.5 Composition of the Delegation**

A well-balanced delegation is composed of members of various ranks, disciplines and interests. The Contractor shall be aware of and respect the rank and protocol of the composition of the delegation.

### **Support Staff**

USTDA will consider funding the travel of support staff for only those delegates with the rank of Prime Minister, President or Minister, or their local equivalent. Any issue of such support shall be raised early by the Contractor with USTDA and the head of the delegation.

### **Spouses and Other Family Members**

USTDA will not authorize the use of USG funds for the travel of spouses or other family members of RTM delegates.

### **Foreign Service National (FSN) and Commercial Officer Delegates**

USTDA may include an FSN or Commercial Officer as an RTM delegate. If required, USTDA will specify in the individual Task Order if the travel of an FSN or Commercial Officer has been authorized. If travel for an FSN or Commercial Officer is not specified in the individual Task Order, the Contractor shall discuss the requirements/requests for such travel with USTDA prior to discussing it with an FSN or Commercial Officer. Adding the travel costs for a FSN or Commercial Officer to the Task Order requires the CO's approval.

The Contractor may not task U.S. Embassy/Consulate staff (i.e. they cannot be used to augment the Contractor's staff by taking on any roles that are the responsibility of the Contractor). The U.S. Embassy/Consulate staff do not serve as a substitute for the Contractor's responsibilities to manage the logistics and communication with the delegation. However, USTDA recognizes that the U.S. Embassy/Consulate staff often assist in a coordination role on events.

## **A.6 USTDA Overseas Offices and Representation**

For the purposes of IQC task order budgeting, please refer to the information below as it concerns USTDA overseas personnel and representatives. As this information is subject to change, please ensure you verify the currency of the information prior to proposing and budgeting.

Meals and incidental expenses (M&IE, minus any conference meals) and travel insurance costs for these individuals SHALL NOT BE included in the IQC Task



Order Rate Charts by the Contractor.

- **Bangkok, Thailand** – Asia Regional Manager and Deputy Regional Manager.
- **Johannesburg, South Africa** – Financing and Implementation Manager for Sub-Saharan Africa and Senior Business Development Specialist.
- **Accra, Ghana** – Regional Manager for West Africa
- **São Paulo, Brazil** – Senior Business Development Specialist.
- **New Delhi, India** –Senior Business Development Specialist and Program/Administrative Assistant.
- **Hanoi, Vietnam** –Senior Business Development Specialist.
- **Lagos, Nigeria** – Senior Business Development Specialist.
- **Nairobi, Kenya** – Business Development Specialist
- **Kuala Lumpur, Malaysia** –Business Development Specialist.
- **Jakarta, Indonesia** – Business Development Specialist

## **SECTION B: ITINERARY DEVELOPMENT**

### **B.1 Acknowledgement of USTDA's role in the RTM**

USTDA expects the Contractor to properly acknowledge the role of USTDA to U.S. participants and the RTM delegation alike. This may include the following:

- Documents as specified throughout the Manual will be approved by USTDA and will be prepared on USTDA letterhead.
- The Contractor will represent USTDA sponsorship in all written communication with U.S. participants.
- USTDA's mission and role in the RTM will be clearly presented to all parties. Invitations, gifts or symposia materials will properly bear USTDA's logo. All instances where the USTDA logo will be used must be cleared in advance by USTDA.
- The USTDA Country Manager and, if applicable, Event Manager will work in consultation with the Contractor to determine USTDA staff representation at all events.
- If specified in the PWS, USTDA will sponsor a reception in honor of the delegation. No USTDA reception shall be planned without the prior approval of USTDA.
- USTDA reserves the option for USTDA personnel to travel with the delegation at USTDA's separate expense. The Contractor will make every attempt to facilitate such participation.
- The Contractor will work with the USTDA's Office of Public Affairs to ensure all USTDA Congressional and public affairs interests are met.
- The Contractor shall be mindful of the fact that USTDA is an independent agency of the U.S. Government and shall take particular care in ensuring that this is understood by all participants in USTDA-sponsored events.

### **B.2 Centralized Planning**

The Contractor, as a representative of USTDA, will serve as the central planning authority for the itinerary and will diplomatically convey this message to RTM delegates, as well as any U.S. participants. When developing visits to cities outside of Washington, D.C., the Contractor shall contact, where appropriate, the nearest U.S. Export Assistance Center and/or contact the relevant USTDA Making Global Local partner(s) to inform them of the visit and to identify possible site visits and/or other appropriate meetings. Similarly, where appropriate, the Contractor shall promote the visit to the local Small Business Administration office and the Minority Business Development Agency, often co-located with the U.S. Export Assistance

Center. As noted in Section A.1 above, the Contractor must coordinate with such additional parties, but may not task any of them with any of the Contractor's responsibilities.

### **B.3 Delegation Input into the Itinerary**

Every effort must be made to include the interests of the delegates in the itinerary. The Contractor in coordination with USTDA shall ask the delegates to identify specific areas of interest. The delegates shall be made aware of any interest expressed by U.S. industry or organizations in the RTM.

### **B.4 RTM Itinerary Format**

The RTM delegation itinerary shall include, but not be limited to the following:

- Title of the RTM;
- Contact information for contractor staff traveling with the delegation and USTDA staff managing the RTM
- USTDA logo
- Exact meeting times, locations and meeting/organization points of contact, including their contact information;
- Meeting participants (full names with titles), in order according to protocol;
- Overview of discussion topics;
- Hotel name, address, phone and guest email;
- Airline names, flight numbers and times; and
- Complete dates and times for each event.

## **SECTION C: COMPONENTS OF THE RTM ITINERARY**

### **C.1 Meetings**

USTDA expects the Contractor to monitor the itinerary so all activities are planned in the most effective format. Presentations should be tailored to the interests of the delegates and prompt discussions with the delegates. They should not be a direct sales pitch. Sample presentation formats include:

- Introductory briefing to delegates regarding the purpose of the event and logistics details;
- Company visits;
- Site visits for product demonstration;
- Industry technical symposia/conventions;
- U.S. participant/delegate meetings in other appropriate locations;
- Training;
- Finance briefings;
- USG presentations; and
- Meals and receptions.

### **C.2 Role of Relevant Washington Embassy(ies) and Consulates**

As standard courtesy, the office of the Washington Embassy and the embassy's Commercial Attaché or equivalent shall be notified by the Contractor or USTDA of the dates, itinerary and general mission of the RTM. Please consult with the USTDA Country Manager (and Event Planner) on who should contact the Washington Embassy.

The participation of the Washington Embassy will vary depending on the resources of the embassy, the stature/rank of the delegation and the schedule of embassy representatives.

### **C.3 General Scheduling Issues**

#### **Escorting the Delegation**

The delegation must be accompanied throughout the RTM by the Contractor, as described above in section in Part II, A.1. The delegation shall never be without a representative liaison of USTDA, or a qualified decision-maker of the Contractor.

The delegation shall be accompanied throughout the course of the entire RTM in the United States on all domestic planes, trains, buses and overnights in hotels. The Contractor escort shall be familiar with U.S. business travel procedures and accountable to the Contractor for all delegation activities.

The Contractor's plans for escorting the delegation through the course of a delegation visit or other event, including Contractor staff who are proposed to accompany the delegation and their titles and roles consistent with requirements listed in Part II, Section A.1, shall be clearly stated in the Contractor's initial proposal.

### **Allowing Time for the Delegation to Meet amongst Themselves**

The Contractor must allow time for the delegates to meet amongst themselves to discuss business strategy. The Contractor shall be available, but not present, during these meetings.

### **Meeting Site Visit Clearances**

The Contractor shall determine whether security clearance of delegates and the Contractor's staff (including subcontractors such as interpreters) is required for each meeting and site visit. The Contractor shall ensure that required information for site visit / meeting clearances be provided with sufficient time to allow for delegate attendance. Further, the Contractor shall support participation of USTDA's Office of Public Affairs engagement in site visits, including facilitating, where possible, press engagement and video recording of the event or site visit. If the Contractor experiences any difficulties with obtaining such clearance, particularly for locations that are of particular importance to the effectiveness of the visit or event, the Contractor shall communicate such issues to USTDA at the earliest possible opportunity and jointly develop a strategy to overcome such difficulties.

### **High-Level Delegation Visits**

USTDA may host an RTM, Conference, Workshop or other USTDA event that includes high-level foreign delegates, such as a head of state or head of government. If this is the case (and also on occasion for a minister), the Contractor may be required to provide appropriate advance work including: security coordination, advance site visit of meeting locations, communications plan, emergency contingency plan, and preparation of a minute-by-minute agenda with exact routing. The Contractor shall ensure that lodging, air travel, ground transportation, and meal arrangements take into account the additional security and protocol requirements involved in such an event. The Contractor shall develop and implement a plan in coordination with USTDA's Office of Public Affairs for potential media and Congressional engagement. The Contractor shall also take photographs of all major RTM events and meetings and select only the highest-quality images for submission to USTDA.

## **C.4 Business Briefings**

The Contractor may be called upon to organize a business briefing during the course

of the RTM. The purpose of the Business Briefing is to provide an opportunity for the delegates to convey information about potential projects in their country or countries to U.S. firms, particularly related to project scope, project cost, financing and procurement procedure and timing. The requirement to organize a business briefing will be stated in the individual Task Order. If required, the Contractor shall be responsible for identifying and recruiting appropriate U.S. firms to attend the business briefing, including major U.S. firms active in the sector, as well as small and medium- sized businesses that may also be interested. The organization of a successful business briefing and the recruitment of appropriate and interested U.S. firms require time and attention on the part of the Contractor. The plan for recruitment and organization of the business briefing, including marketing and promotion, shall be discussed in detail with USTDA and shall be factored into the Contractor's cost and time estimates for the RTM.

### **C.5 USTDA Staff Participation**

USTDA staff regularly accompany the delegation for part or all of the itinerary. During the program, USTDA staff may participate at a private sector sponsored event if such staff is assigned to participate as a speaker, panel participant, or otherwise to present information on behalf of USTDA. The staff's participation in the event on that day is viewed as a customary and necessary part of his or her performance of their assignment.

## **SECTION D – COMMUNICATIONS AND CORRESPONDENCE**

In cases where official U.S. correspondence is mandated (e.g. information or briefing cables, invitation letters, or any document to be produced on USTDA letterhead), the Contractor will be responsible for either supplying drafts of all such correspondence to the COR for official transmission by USTDA, or for obtaining USTDA letterhead and envelopes from the COR and printing out USTDA-approved text, obtaining appropriate signatures, and delivering the same.

All correspondence and other written materials from the Contractor, including but not limited to itineraries, fact sheets, briefs, registration materials, marketing and outreach documents, emails and reports, shall be grammatically correct, free of typographical errors, and culturally appropriate. It is essential that the Contractor pay particular attention to the correct spelling of names and titles for all delegates and other participants in all materials, and that the tone and content of all correspondence, including emails, be appropriate. If written materials submitted to USTDA do not conform to this standard, USTDA may reject the material and require that it be resubmitted in appropriate form at no additional cost to the Government.

### **D.1 Information Flow, Briefing and Communications**

The CO/COR/ACOR shall be regularly briefed by the Contractor about pending issues and potential problem areas. Throughout the duration of the Task Order, the Contractor will ensure that the CO/COR/ACOR receives the following:

- Regular, brief oral or written event status reports;
- Delegation list: full name, title (in order of protocol);
- Delegation biographies;
- Notice of any special circumstances (date changes, delegation size, name changes);
- Periodic draft itineraries;
- Complete itinerary (at least 3 days prior to arrival of the RTM delegation); and
- Final itinerary with the submission of the Final Report after Government acceptance.

### **D.2 Maximizing Delegation and USTDA Exposure**

The Contractor, after consultation with the COR, may be required to contact the following (please note that this list is not exhaustive):

- The U.S. Embassy/Consulate;
- USTDA's Offices of Public Affairs and M&E Office;
- The U.S. Department of Commerce country or sector desk officer;
- The U.S. Department of State country or economic desk officer;

- Local U.S. Export Assistance Center (USEAC) offices;
- Other interested USG agencies such as the Federal Aviation Administration (FAA), the U.S. Department of Energy (DOE), the U.S. Department of Health and Human Services (HHS), Minority Business Development Agency (MBDA), and the Small Business Administration (SBA);
- State and local trade promotion offices, including USTDA Making Global Local partners;
- Industry associations, newsletters and notices; and
- Local and state Chambers of Commerce.

### **D.3 Marketing Strategy and Handling**

The Contractor, in consultation with USTDA, shall develop a media strategy for publicizing the event. This strategy shall outline the following:

- Notifications of and engagement with social, industry, trade and other relevant media.
- Coordination with Making Global Local partners and, as appropriate, municipal, state, and foreign governments regarding publicizing the RTM/Conference/Workshop/Training.

The Contractor shall notify the USTDA's Office of Public Affairs of all media requests made of the delegation. In addition, the Contractor will always notify individual delegates of requests for interviews and schedule them appropriately, if agreeable to USTDA and the delegate.

**Announcements that have any connection to USTDA shall be fully coordinated with the COR/ACOR and, unless otherwise directed by USTDA, approved and distributed by USTDA. The Contractor shall convey this message appropriately to the delegation as well.**

### **D.4 Social Media**

During the kick-off meeting with the COR, ACOR and Public Affairs, the Contractor and USTDA will assess whether or not social media will be used as a component of the event.

For example, if USTDA finds the event to be of high public interest, the Contractor will be requested to provide regular updates in the form of e-mailed photos, captions and other information for sharing on social media platforms such as Twitter, Facebook or LinkedIn. It is expected that such updates may be on a daily basis, but for certain events may be more frequent.

USTDA will be responsible for posting shared content to its social media platforms. The Contractor also may be responsible for developing and sharing content with



USTDA's Office of Public Affairs during USTDA-sponsored events for posting on the Agency's digital media platforms.

## **D.5 Itinerary for Public Affairs**

One month in advance of the event, the Contractor shall provide USTDA a draft itinerary, including proposed and confirmed site visits, to the COR/ACOR. Two weeks in advance of the event, the Contractor shall also provide the COR/ACOR a delegation list and list of U.S. participants.

## **D.6 Correspondence with the U.S. Embassy/Consulate**

The Contractor shall send to the appropriate U.S. Embassy/Consulate staff pertinent information as listed below and any other information as directed by the COR.

### **Briefing Materials for U.S. Embassy/Consulate**

- Delegation List
- RTM Statement of mission
- Description of RTM program
- Overview of itinerary

## **D.7 Correspondence with the Washington Embassy/Consulate of the Host Country(ies)**

The Contractor shall send to the appropriate Washington embassy and the embassy's Commercial Attaché (or equivalent) the information listed below and any other information as directed by the COR. Please consult with the USTDA Country Manager (and Event Planner) on who should contact the Washington Embassy.

### **Briefing Materials for Washington Embassy of the Host Country(ies)**

- Delegation List
- RTM Statement of mission
- Description of RTM program
- Overview of itinerary
- Security clearance information required for embassy/consulate staff to join site visits or U.S. government meetings

## **D.8 Correspondence with the RTM Delegation**

The Contractor shall keep the RTM delegation abreast of itinerary developments and outstanding issues. An illustrative list of correspondence includes:

- USTDA invitation letter
- Preliminary briefing letter
- Background Information Request
- Letter of welcome from the USTDA Director
- Draft detailed RTM itinerary
- Activity follow-up survey

### **Invitation Letter**

The Contractor shall prepare a draft invitation letter to each member of the delegation. The draft shall be forwarded to the USTDA COR for approval, preparation on USTDA letterhead, and signature.

The Contractor shall be responsible for delivering the invitations to the delegates. This letter will serve as official confirmation of the RTM.

The invitation letter will often be used by the delegation as evidence of the purpose of travel to the United States, which is presented to the Consular Affairs Office of the U.S. Embassy/Consulate when applying for a visa to visit the United States. Therefore, the following issues to be included in the body of the letter have specific official purposes. The letter shall, at a minimum, cover the following:

- Clearly identify the invitee (for visa purposes);
- Identify USTDA as the host of the event (state of USTDA's role and mission);
- Describe the nature of the visit;
- State the departure date and the return date;
- Introduce the Contractor (with a contact number and email address) (state that the Contractor will be in contact);
- State the purpose of the RTM;
- Describe the preliminary itinerary; and
- State that USTDA is financially supporting the visit.

The invitation letter, especially nomination letters sent to heads of government agencies or companies asking them to nominate delegates, shall include the following language:

*USTDA is committed to hosting diverse delegations. In particular, given that women are typically underrepresented in events in sectors in which USTDA is active, it is USTDA's policy to encourage the inclusion of women when nominating individuals to attend USTDA events.*

### **Introduction of Contractor to RTM Delegation**

The Contractor shall contact the delegation and provide the following information:

- Introduction, role and overview of the Contractor;
- General itinerary;
- Planning issues; and
- RTM delegation background information request.

### **RTM Delegate “Background Information Request”**

As soon as the RTM Delegation List is finalized, the Contractor shall request the following information from the delegation:

- Delegation List in order of protocol;
- Full proper name with phonetic pronunciation (as the name appears on the delegate’s passport as well as the name by which the delegate would like to be addressed in meetings);
- Proper title and salutation;
- Narrative biography;
- English language level;
- Native and other languages spoken;
- Gender;
- Smoker/non-smoker;
- Special food requests/restrictions;
- Disabilities that require special accommodation for the event;
- Emergency contact numbers;
- Dates of holidays which may affect the planning;
- Specific objectives for the event, including companies, technologies, site visits, and other pertinent information; and
- If relevant to the training or areas of planning, information to assess baseline knowledge of specific topics and areas of training.

### **Pre-RTM Delegation Briefing Letter**

No later than one month prior to the start of the RTM, the delegation shall be briefed by letter, email, and/or phone on the following information:

- How meals will be provided for during the delegation’s stay in the United States;
- Notice of travel insurance coverage, copy of insurance policy;
- Mode of travel;
- The requirement to use U.S. flag air carriers;
- Fare class and how delegates can obtain upgrades;
- When/how tickets will be received;
- Interpretation (if applicable);
- Emergency points of contact for Contractor (while delegation is *en route*);
- Receptions or other social events the delegates will be attending; and
- Contractor’s role during the RTM.

## **D.9 Correspondence with U.S. Participants**

Prior to the RTM, the Contractor shall provide the U.S. participants with the following information:

- Introduction to USTDA and the RTM;
- Delegation List (including delegate roles) and Contractor's participation;
- Outstanding scheduling issues/questions;
- RTM mission statement;
- Project financing status;
- Role of the U.S. participants; and
- Draft outline itinerary.
- USTDA brief outlining USTDA as the official sponsor of the delegation visit

The Contractor shall provide this information early enough (at least two weeks in advance) to help companies to effectively plan their involvement in the RTM, Conference, Workshop or Training. Please note, all correspondence with U.S. companies related to the event shall include the USTDA signature banner, per Part II, Section A.1 of this Manual.

In addition, the Contractor shall request the following from the U.S. participants:

- Briefing materials on U.S. participants' companies and products, and
- Background information on the U.S. participants (e.g. biographies).

## **D.10 Briefing Materials**

The Contractor shall prepare and distribute briefing materials to U.S. participants (including site visit and meeting hosts), as well as to the RTM delegation.

### **U.S. Participants' Briefing Materials**

The following information shall be included in the briefing materials provided to any U.S. participant well in advance of meeting with the delegation:

- USTDA brief (available from USTDA's Office of Public Affairs);
- Delegation List in order of protocol, the full names with phonetic pronunciation, as appropriate, and titles of the delegates and those traveling with them. This information will be used repeatedly throughout the visit, such as in the preparation of presentations, seating instructions, security clearances, and name badges;
- Delegate biographies;
- Background information on country, sector and project(s);
- RTM mission statement;

- If applicable, a summary of USTDA Definitional Mission (DM), and Feasibility Study (FS) or Terms of Reference for the FS, if the FS has not yet been done;
- Foreign economic trends of the country or region of the delegates;
- Any publicly available and relevant delegate plans for infrastructure development (e.g., national plans or goals) ;
- “Doing Business in (country)” (available from the U.S. Department of Commerce published on [www.export.gov](http://www.export.gov) or contact the Country Desk Officer) and “Business Courtesy/Protocol in country)” (available from the U.S. Department of State found at [www.state.gov](http://www.state.gov) or contact the Country Desk Officer);
- Finalized RTM itinerary; and
- Resources for U.S. participants.

In addition to the above, the following information should be provided to companies hosting meetings and site visits:

- How delegates’ stated interests relate to the site visit and/or U.S. company, and
- Relevant information on the delegates’ projects for the site visit and/or U.S. company.

This material shall be provided to the U.S. participants so that they can effectively understand and address the delegation’s interest and objectives while recognizing the context in the delegate’s host country.

### **RTM Delegation Briefing Materials**

Contractor shall prepare, produce and distribute a briefing package to the delegates upon their arrival in the United States, which shall include at a minimum the following materials:

- Letter of welcome from the Director of USTDA, prepared by the Contractor and approved and routed for signature by USTDA;
- Draft itinerary;
- U.S. participant background summaries;
- Briefing on sector in the United States;
- “Doing Business in the U.S.” and “U.S. Business Courtesy and Protocol”; and
- Information regarding the sites and U.S. companies to be visited.

### **D.11 Follow up Surveys for Delegates and U.S. Participants**

The Contractor shall develop two distinct post activity follow-up surveys for delegates and U.S. participants. Draft surveys shall be reviewed approved by the CO/COR in consultation with the Program Evaluation Manager before distributing or soliciting feedback. The questions shall be structured to obtain information that demonstrates the impact/outcomes of the USTDA-funded event and the degree to which the intended goal, as stated in the Task Order, was realized.

For a virtual or hybrid event, the Contractor shall work with the COR and in consultation with USTDA's M&E Office, to develop surveys and data collection methods to obtain feedback on the virtual or hybrid event. **The Contractor is responsible for organizing a meeting at least one month in advance of the events and trainings to discuss M&E's concerns and suggestions for obtaining feedback on a virtual or hybrid event.**

Contractors may use the following language in all surveys:

*Survey responses will only be provided to USTDA. USTDA and CONTRACTOR COMPANY will maintain the confidentiality of such information, subject to and in accordance with applicable U.S. law. Please note any information that is particularly sensitive.*

## **D.12 Thank You Letters**

The Contractor shall work with the USTDA COR/ACOR and shall be responsible for preparing and delivering all thank you letters for the RTM. The thank you letters shall be on USTDA letterhead, and the COR/ACOR shall inform the Contractor as to whether the letters should be sent electronically or in hard copy, and who will sign them. Draft letters shall be provided to USTDA within five calendar days of the conclusion of the RTM, addressed to each RTM delegate and all U.S. participants. Alternatively, the COR/ACOR may request that the Contractor prepare thank you correspondence in a format suitable for email transmission.

## **D.13 Recap: Documents that will bear the USTDA Logo**

The Contractor shall work with the USTDA COR regarding the issuance of the documents listed below:

- Invitation letter(s) to the RTM delegation;
- Letter of welcome from the USTDA Director;
- Reception invitations as applicable;
- All marketing materials associated with the event (save-the-dates, flyers, signage, etc.);
- Letter to U.S. participants; and
- Thank-you letters.

The Contractor shall include USTDA's logo on all marketing materials associated with the event.

## **SECTION E: INTERPRETATION/TRANSLATION**

### **E.1 USTDA Policy on Interpretation/Translation**

Please see Annex III – Guide to Interpretation/Translation.

Through early discussions with the COR/ACOR, the Contractor shall ascertain the interpretation needs of the RTM delegates. The Contractor shall organize interpretation services, as needed, in the delegates' primary language. Interpreters shall be certified at a level equivalent to the U.S. State Department's Level 5 fluency certification. Unless otherwise specified interpretation shall require two interpreters per language due to the need for simultaneous translation at Meet and Greets with USTDA leadership, Business Briefings, other large meetings and the need for interpreters to have breaks to preserve the quality of interpretation.

If known in advance, the individual Task Order will state the need for interpretation. If not, the selection of an interpretation option should be discussed early in the planning process. A resource for questions is the U.S. Department of State (DOS). Contact DOS by telephone at (202) 647- 6575, or visit the website at [www.state.gov](http://www.state.gov).

## SECTION F: TRAVEL ARRANGEMENTS

Unless otherwise specified by USTDA, the Contractor assumes the responsibility for all logistical arrangements for the delegation and will make any direct payments for such arrangements as the Contractor for USTDA. The Contractor shall be responsible for arrangements for every member of the delegation from the time the delegate departs his/her country, until he/she returns to his/her home country. The Contractor shall accompany the delegation with at least one qualified professional staff member (and as specified in II A.1 above, two qualified professional staff members for all substantive days) from the time the delegation arrives in the United States until the time the official completion of the RTM (generally when the delegation leaves the United States).

### F.1 Visa Requirements

RTM delegates may need a non-immigrant visa to travel into the United States. The Contractor shall contact the U.S. Department of State Visa Information Office or [www.state.gov](http://www.state.gov) to check visa requirements. It is the responsibility of the Contractor to:

- Ascertain the lead-time required for the submission of visa applications to the U.S. Embassy/Consulate.
- Ensure the delegates are informed of the required documentation and apply for their visas in a timely manner.
- Draft a letter to the U.S. Embassy/Consulate consular section, for USTDA signature and delivery, requesting issuance of visas for the RTM delegation, if needed, and attaching the Delegation List.
- Follow through to ensure the visas were actually issued.

### Non-Immigrant Visa Requirements

Each delegate must obtain a Non-Immigrant Visa Application Form from the U.S. Embassy/ Consulate Consular Affairs Office in his or her home country. Each delegate will submit the following information to the Consular Affairs Officer at the U.S. Embassy/Consulate in their country:

- Completed non-immigrant visa application;
- Current passport;
- One current 1.5-inch square photograph (black and white or color);
- USTDA Letter of Invitation; and
- Evidence of “binding ties to residence abroad” in other words, real estate, family or other compelling reasons to return to their home country.



## **F.2 Air Travel**

Air transportation of persons or property shall be on U.S. flag carriers in accordance with the Fly America Act, 49 U.S.C. § 40118, to the extent service by such carriers is available, as provided under applicable U.S. government regulations.

A U.S. flag air carrier is defined as an airline which has a certificate of public convenience and necessity issued by the U.S. Secretary of Transportation, authorizing the airline to provide air transportation, as provided by 49 U.S.C. §§ 40118 and 41102.

Detailed information regarding USG policy on travel and use of U.S. flag air carriers may be found in 49 USC § 40118 (The Fly America Act) and Federal Travel Regulation Part 301-10. Any request for an exception to the use of a U.S. flag carrier must be reviewed and approved by the CO in writing prior to expenditure.

### **Class of Airline Tickets**

Unless otherwise specified by the CO or the PWS, the following guidelines apply:

- Business class tickets, international and domestic, may be issued only to delegates of ministerial rank or higher, and
- Economy class tickets shall be issued to all non-ministerial delegates.

The Contractor shall also research how the delegates could, at their own expense, upgrade their tickets, and shall provide this information to the delegates.

### **Type of Tickets**

Unless otherwise specified by the CO or the PWS, the Contractor shall use for purposes of cost estimation fully refundable tickets (no penalty). However, refundable penalty fare tickets may be purchased if the CO so directs in writing.

## **F.3 Ground Transportation**

The Contractor shall provide for adequate ground transportation. This may include rental car, van or bus as appropriate. In consultation with the USTDA COR/ACOR, ministerial ranking delegates may be transported by an executive car service. This is often an item for which the Contractor attempts to obtain sponsorship.

## **F.4 Lodging**

The Contractor shall select hotels that provide services consistent with the objectives of the event and that are reasonably priced. Unless otherwise directed, hotels shall be appropriate high-quality lodging for the delegations, which often

include senior foreign officials. The hotels shall be at a minimum 4-star hotels. If no 4-star hotels are available in a city to be visited on a RTM, the Contractor shall notify the COR/ACOR and CO, and must obtain CO approval for a less than 4-star hotel. Wherever possible, rates shall fall within USG's maximum lodging allowance for USG employees. Ministerial level delegates are entitled to suite accommodations. If necessary, an additional room for meetings may be included in the lodging cost. All proposed lodging is subject to approval by the COR and CO.

## **F.5 In-Country Expenditures**

The Contractor shall provide meals for each delegate during their time in the United States. The Contractor shall arrange for sponsorship of delegate meals to the greatest extent practicable. In the absence of sponsorship, the Contractor shall arrange and pay for delegate meals, the cost of which shall be determined by using as a guide, the amounts designated for meals in the U.S. Government Meals and Incidental Expenses subsistence allowance schedule. If delegates elect not to partake of the meal provided, they are free to eat elsewhere at their own expense. Proposals shall identify proposed meal arrangements in both the narrative and the Task Order Rate Chart.

Direct payments for hotel room and tax shall be the responsibility of the Contractor. Delegates (not the Contractor as these items will not be reimbursed by the Government) are responsible for the cost of all incidental charges such as:

- Hotel local and long-distance phone charges
- Hotel laundry and pressing services
- Personal sundry items
- In-room refreshment centers
- In-room movies
- Room service charges
- Health Club/Spa Services

The Contractor shall notify the delegation of how meals will be provided during their visit and shall forewarn delegates as to the potential costs of some hotel services. The Contractor shall ensure that meal options and arrangements (e.g., voucher versus fully arranged) reflect sensitivity to the culture of the delegation members. The Contractor should discuss plans for providing meals with the COR during the course of developing the details of the event.

## **F.6 Insurance Coverage**

The Contractor is required to arrange for two types of insurance coverage:

- Travel medical insurance for all delegates coming to the United States; and
- Defense Base Act (DBA) Insurance and Medical Evacuation Insurance (when

applicable for Contractors).

## 1. Delegation's Travel Medical Insurance

Insurance shall be provided for **all** non-U.S citizen delegates, including those delegates that are self-funded. **The premium is paid directly by USTDA to the insurance contractor** and is **NOT** part of the Contractor's budget. The Contractor **is** responsible for supplying a completed **Insurance Registration Form** and **Roster** to the insurance contractor at least three (3) full business days before travel is to commence to allow time for processing. See Part III, Section B.1 of this Manual for the forms.

USTDA will provide traveler's sickness and accident insurance for delegates while they are on official USTDA business. Any extension of the insurance by or on behalf of the delegation or any delegate before or after the official event requires the approval of the USTDA CO prior to the issuance of insurance. Any such extension of insurance shall be at the delegate's expense.

**Coverage is in effect as of the date issued/approved the insurance service provider. The Contractor must ensure that all travel insurance is in place prior to the departure date from the delegate's home country.**

## 2. Defense Base Act (DBA) and Medical Evacuation Insurance (for Contractors when they perform work overseas)

- Defense Base Act (DBA) Insurance
  - Pursuant to the contract clause entitled, "Worker's Compensation Insurance (Defense Base Act)" (FAR 52.228-3), the Contractor is required to have DBA coverage for its employees performing work overseas. The Contractor shall procure this insurance through sources that provide such coverage (e.g. contracted sources to United States Agency for International Development (USAID)).
  - The cost for such insurance shall be set forth as a separate line item in the Contractor's offer for each individual Task Order as an Other Direct Cost. USTDA will reimburse the Contractor for its DBA insurance costs. USTDA does not make direct payment to the insurer for this insurance; the Contractor shall pay the insurer. The premium formula is based on employee remuneration while conducting business outside the United States.
  - If USAID or the Contractor has secured a waiver of DBA coverage for Contractor's employees who are not citizens of, residents of, or hired in the United States, the Contractor agrees to provide such employees with worker's compensation benefits as required by the laws of the country in which the employer is working or by the laws of the employee's native

country, whichever offers greater benefits.

- The Contractor agrees to insert all subcontracts hereunder to which the DBA is applicable, a clause similar to this clause, including this sentence, imposing on all subcontractors a like requirement to provide overseas worker's compensation insurance coverage and obtain DBA coverage under the USAID contract.

- Medical Evacuation Insurance

USTDA requires all Contractor personnel working outside the United States to have medical evacuation insurance. The Contractor shall procure this insurance through sources that provide such coverage (e.g. MEDEX at [www.medexassist.com](http://www.medexassist.com)).

## SECTION G: GENERAL INFORMATION

### G.1 Introductions

Introductions should be made as a matter of courtesy and acknowledgement of rank. An individual with a lower title is introduced/presented to someone of higher rank. Generally, in the case of RTMs, the U.S. participant should be presented to the delegate: "Mr. Minister, may I present Dr./Mr./Mrs./Miss(U.S. Participant)." Generally,

- A fellow executive is presented to a customer
- A junior executive is presented to a senior executive
- A younger person is presented to an older person
- A Non-Governmental Official is presented to a Government Official

### G.2 Photographs

**Within two weeks of the conclusion of the RTM**, the Contractor shall provide USTDA photographs and video footage of the event that are suitable for publication. Please remember to disengage the date and time stamps before taking the photographs. Flash drives shall be clearly labeled with the name and date(s) of the event and the activity number. They shall also include the Contractor's name and contact information for any questions about the photographs.

The Contractor shall identify key photographs and video (no more than 25) in a separate folder on the flash drive and provide descriptive/identifying information associated with them. In selecting which photographs and video are important, the Contractor shall consider those that best represent the event. The descriptive/identifying information shall be provided in a separate Word file that contains the photograph file name, followed by the descriptive/identifying information. In identifying persons in photographs, the Contractor shall include the names, affiliations and titles. All other photos not present in the key photos folder should be placed in a separate folder, however descriptions or identifying information is not needed.

Photographs and video taken during RTMs should be high resolution shots, whenever possible, and shall include both posed and interactive pictures. If site visits or plant tours are included as part of the delegates' itinerary, the Contractor shall seek photographs and video of delegates interacting with each other, with U.S. experts, and participating in equipment and/or technology demonstrations, as well as photographs with or without people that show typical technology or equipment seen during the visit. USTDA is also interested in photographs without people that show typical technology or equipment in the covered sector.

As a standard, USTDA requires that all digital images be taken with resolution, no less than 300 pixels per inch (dpi), so that they can be used in USTDA's printed materials. Preferred sizes are 3x5 (900 x 1500 pixels) or 4x6 (1200 x 1800 pixels) or larger. For optimal results, please adjust digital camera settings to the best quality resolution. USTDA requires that all videos be taken with a resolution of 1920x1080 pixels and a maximum file size of 128 MB. These photographs and videos shall be sent to the attention of USTDA's Office of Public Affairs.

The Contractor will provide one or more photographs to the delegation as a souvenir record of the RTM. Public and confidential versions of the Final Report shall include relevant photographs taken during the RTM.

Please note that there may be additional requirements for submission of photographs and video for use on USTDA's social media platforms and/or inclusion in USTDA press releases, as described in Section D.

### **G.3 Official Airport Greetings and Farewells**

The USTDA COR/ACOR, Country Manager, Event Manager or Regional Director may wish to greet or bid farewell to the delegation. The Contractor shall keep the COR/ACOR and/or Country Manager and/or Event Manager informed of arrival and departure information into the United States and/or Washington, D.C.

Likewise, the Washington embassy(ies) may also wish to greet or bid farewell to the delegation. The Contractor will contact the embassy staff to ascertain their plans.

### **G.4 Official USTDA Delegation Protocol Gifts**

The Contractor shall provide protocol gifts for each delegate. Each protocol gift should not exceed \$30 in value and, unless provided directly by USTDA, this cost should be included in the Task Order Rate Chart. The Contractor shall research the cultural and customary aspects of the issues of gift-giving in the country of the delegation.

USTDA has recommendations for protocol gifts for the delegation; please contact the COR/ACOR for more information on USTDA's recommendations. If the Contractor has an alternate gift idea that would be more suitable given the sectoral or regional focus of the delegation, the Contractor should discuss with the COR/ACOR. Official approval from the COR/ACOR must be obtained before purchasing the protocol gifts.

## **SECTION H: REPORTING**

### **H.1 Presentation and Style**

All reports for RTMs, Conferences and other USTDA-sponsored events with similar reporting requirements, shall be delivered to USTDA and shall be grammatically correct and free of typographical errors. The reports shall include on the cover: USTDA's logo; attribution of USTDA as the funding source; USTDA's mailing address; and USTDA's mission statement as provided by the Agency.

### **H.2 Final Report**

The Contractor shall provide a written Final Report no later than three (3) months following the conclusion of the RTM, Conference, Workshop or other USTDA event. This report will be referred to as the "Final Report." The Final Report will be divided into two separately bound volumes. The main report shall be deemed confidential and shall not be deemed suitable for public distribution. It is the responsibility of the Contractor to clearly mark the Final Report with the word "Confidential" on the cover and the header on all pages of the Final Report. The second volume will be the "Public Version" which is further described below. The Final Report shall give a full report of the RTM, Conference or other USTDA-sponsored event, including an executive summary, Contractor feedback, list of delegates, agenda, meeting summaries, delegate feedback, U.S. industry feedback, and a list of foreign participants as well as participants from U.S. companies and other entities (including U.S. Government, universities, not for profit organizations, etc.). A template for the report is provided by USTDA and must be followed.

The Contractor shall contact all foreign and U.S. participants in the RTM, Conference, Workshop or other USTDA event to determine what commercial, policy, and/or developmental outcomes resulted (or are underway) from the RTM, Conference, or other USTDA event. The Final Report will display information received from U.S. and foreign participants that is relevant for understanding whether and to what degree the activity assisted the achievement of USTDA objectives. These objectives may include: U.S. commercial benefits, host country development benefits, and policy or economic reform objectives as set forth in the individual Task Order. This information shall be based on discussions observed during the USTDA sponsored activity and surveys administered via email, telephone, or digital survey platform to the foreign and U.S. participants following the activity.

For example, the U.S. participants should be asked to project their firm's business potential in the Country of Delegation over the next 1-3 years. In the case of policy objectives, foreign participants (and some U.S. participants) should be asked whether and to what degree progress towards the desired objective was facilitated

by the USTDA-funded event. USTDA believes that this information is necessary to establish a “baseline” that will be helpful in guiding future follow-up program evaluation work. The Contractor shall endeavor to obtain the maximum amount of information possible from the U.S. firms and Delegates. The information shall be firm or entity specific (as in the case of a government entity, NGO, etc.) and presented individually for each entity. Contact information for the individuals providing the information shall be included. Participants who failed to respond should be identified to assist future program evaluation efforts. The Contractor shall provide the survey instruments containing the list of questions asked of delegates and participants in the Final Report as well as the completed survey response data, provided in a data file (i.e. Excel Spreadsheet) if applicable. USTDA will maintain the confidentiality of commercially sensitive information, subject to and in accordance with applicable U.S. law. Contractors shall take special care to highlight any information that is particularly sensitive.

For the Final Report, USTDA requires the following work effort. At least two e-mails should be sent to all participants (foreign and U.S.). For U.S. participants that had significant interaction with the foreign visitors (in the form of site meetings, private meetings or social events, one on one meetings at Workshops/Conferences/business briefings), USTDA requires the Contractor to make at least two telephone calls to participants who fail to respond to email.

USTDA also welcomes any recommendations that the Contractor may have for follow-up actions that meet USTDA criteria and goals. USTDA will maintain the confidentiality of such information, subject to and in accordance with applicable U.S. law.

The Final Report shall be submitted in draft to USTDA via email within three months following the conclusion of the RTM, Conference, Workshop, Training or other USTDA sponsored event. The Contractor shall incorporate USTDA’s comments as appropriate and shall resubmit the Final Report via email within 15 days of receiving USTDA’s comments.

### **H.3 Participants’ Lists**

The Contractor shall compile separate participants’ lists of U.S. and foreign participants. For the lists of participants, whether foreign or U.S., the Contractor shall include the full name, title, gender (subject to further guidance from USTDA), city, state and country of residence, telephone number, e-mail address and the date and site where the individual participated in the RTM in the format set forth below. The participant lists should provide an opportunity for participants to indicate their interest in receiving information about USTDA news and events. The Contractor shall deliver this via email to [participantlist@ustda.gov](mailto:participantlist@ustda.gov) in Microsoft Excel format.



The format provided below shall be used for the participants' lists in the Final Report for each contact, both U.S. and foreign. A template for the participants' lists should be requested from the COR/ACOR. Each listed category must have its own distinct field, separated into columns:

- Firm/Organization Name
- Are you a Small Business?
- Organization Type
- Employment Designation
- Are you a Delegate?
- Receive USTDA's news & events e-mail?
- Contact Person (First Name)
- Contact Person (Last Name)
- Contact Person (Title)
- Gender (subject to further guidance from USTDA)
- City
- State
- Zip/Postal Code
- Country
- Office Phone Number
- Mobile Phone Number
- Work E-mail Address
- How Did You Learn of this Event?
- If "Other" in the previous column, explain
- Business Briefing Date
- Venue Name (Business Briefing Location)
- City (Business Briefing Location)
- State/Province or Country (Business Briefing Location)

**For all foreign participants**, the Contractor shall also collect employment designations for inclusion in the Final Report. (Example: 5 government representatives, 1 medical professional and 10 private business professionals for a total of 16 participants) Select the employment designations from the following list.

- Agricultural Professionals
- Government Representatives
- Important Political Figures Not Properly Classified Elsewhere
- International Organization Representatives
- Labor Professionals
- Media/Communications Professionals
- Medical Professionals
- Non-Governmental Organization Professionals
- Other

- Private Business Professionals
- Researchers/Faculty (affiliated with academic institutions)
- Researchers (non-academic)
- Scientists/Technologists
- University Administrators/Instructors
- University Graduate Students
- University Undergraduate
- Students Unknown

Contractors are reminded to inform participants that by registering for each event, their contact information will be provided to USTDA and USTDA, to the extent permitted by law, may make such information available to other interested persons upon request. In addition, participants should be informed that they will likely receive requests for information via telephone, mail, or email from USTDA program evaluators, and other USTDA representatives. Contractors should also refer participants to USTDA's privacy policy at [www.ustda.gov](http://www.ustda.gov).

#### **H.4 Content of the Final Report**

The purpose of the Final Report is to document how USTDA's funding was used, what participants gained as a result of participating in the USTDA-sponsored event, and how their participation in the event helped to achieve their goals. Simply stated, reports help document the commercial goals, policy objectives, or developmental impacts of USTDA-funded events.

The purpose and goal of an event will be stated in the Task Order or described by the COR and/or ACOR during the kick-off meeting. The Contractor shall discuss the event's goals in detail with the COR/ACOR and USTDA's M&E Office to ensure the success of the event and meet subsequent reporting requirements.

All reports are reviewed and approved by the COR/ACOR in consultation with the USTDA M&E Office. Once approved, the Public Annex is publicly available in the USTDA library while the Confidential Final Report is limited to USTDA internal use. The Final Report is used by USTDA to track - often five years after the activity occurred - the outcomes and results of an event.

The information contained in the Report is invaluable to USTDA's M&E Office. The Report helps define the evaluation strategy and enable evaluators to ask targeted questions to obtain information from participants, long after the event occurred. The Report is the only frame of reference for USTDA's M&E Office; therefore, the Report shall describe what happened during the USTDA-funded event, what was expected to occur as a result of the event, and what actually occurred as a result of the event. Expected and realized results may include U.S. commercial relationships formed during the event, U.S. exports, policy outcomes, developmental results, or other

positive impacts. The Contractor should distinguish between expected outcomes and actual outcomes and delineate whether the USTDA-funded event had an impact on the expected or realized results.

The Contractor should avoid highlighting the good intentions of an event or providing opinion statements by USTDA or Contractors, except in the designated Contractor Feedback section of the Report. Although it is useful to know whether the event was enjoyed by participants, it does not indicate whether the event helped to accomplish the participants' goals (i.e., what did the event influence or impact?). Documenting whether and to what degree the event was a success and what information was provided to participants provides context for the reader; however, when gathering and reporting information to USTDA, the Contractor shall focus on well-defined results and specific outcomes. Reported outcomes can include opinions and/or statements provided by event participants but should be specific in terms of the cause-and-effect relationship between the USTDA-funded event and the subsequent outcome. **Questions should be tailored to the specific objectives and intended outcomes of that activity.** Examples of customizable questions that may elicit responses about outcomes include:

- What did you gain out of participating and how do you anticipate using the information provided?
- What role did the event play in introducing companies/participants to each other? Were you familiar with this company/these companies and able to take a step forward in your working relationship or was this the first time you met?
- Did the information acquired during the event change the way your organization works, and if so, how?
- Do you anticipate potential commercial contracts in the near future, and if so, with which organizations and for what type of products?
- Do you anticipate the potential for future progress as a result of this activity, and if so, how?
- How did participating in the event change your business development, daily work, knowledge?
- Has your company realized any sales or had ongoing negotiations significantly enhanced, by participating in this event? If so, with which entities, what was sold, and what is the total value (in \$USD) and level of U.S. content (as a %) of the exports?

Outcomes and results can be gathered through a variety of mechanisms including standard inquiries, digital communications (including texts or virtual communications apps), digital survey platforms, personal phone communications, in-person interviews, or a combination of these, provided that in the process of gathering such outcomes and results, the Contractor shall comply in all respects with all applicable laws, including without limitation federal laws pertaining to records, information security, and privacy. The Contractor is encouraged to use a consistent

method to obtain information about the impact of a USTDA-funded event. The method chosen should strive to establish a baseline or starting point of information so that progress and impacts can be measured over a period of time. For example, if the Contractor collects written responses from the Delegates about their interests and objectives as part of the background information development prior to the event, the Contractor should include this information in the Final Report as a comparison to what is reported after the activity is completed. The method chosen should be tailored to the specific goals of the event and should be discussed with the COR/ACOR and USTDA's M&E Office.

### **Explaining Outcomes Realized or Expected in the Future**

The Contractor shall endeavor to obtain the maximum amount of information from all participants. The information obtained shall be summarized and demonstrate whether and/or how the event has continued to impact the participant, even though the event is complete.

For example, it is useful to know that a participant enjoyed the event and obtained information they were seeking; however, for evaluation purposes it is important to know how the participant benefitted from the event and how the information they obtained was used. For example, did the event help create new relationships with U.S. companies, impact the delegates' decision making, or change the way a delegate's organization works? Did the U.S. company decide to open an office in the country of delegation, due to the opportunities that were identified during the USTDA-sponsored event? The benefits could be U.S. commercial benefits, host country development benefits, or policy and/or economic reforms. The benefits could also be any combination of the aforementioned or something else as identified during discussions with the COR/ACOR and USTDA's M&E Office.

### **Collecting Information**

The Contractor shall collect information from all participants by holding discussions, debriefings, interviews, distributing surveys/inquiries or any combination of these. The Contractor may use any method they choose to collect comprehensive information from the participants; however, the Contractor must be able to document the methodology chosen and the level of effort undertaken (as described above under the Final Report requirements). The Contractor shall contact the COR/ACOR to discuss any change or new methodological approach.

The questions posed to participants shall be structured to obtain information that demonstrates the impact/outcomes of the USTDA-funded event and whether and to what degree the intended goal, as stated in the Task Order, was realized. The questions/information should not be limited to whether the event was useful but should identify whether the event resulted in or impacted a participant's goals.

The Contractor shall provide USTDA with the survey instrument containing the list of question for approval by the COR/ACOR in consultation with the M&E Office before distributing and soliciting information from delegates and participants.

In the case where commercial goals have been realized (U.S. exports/sales) or are likely to occur, the Contractor shall obtain and provide detailed information including the names and contact information of all parties involved, the contract value, specifics of what was/will be sold, the duration of the contractual relationship and approximate U.S. content value (as a % or total \$ value).

If there are no outcomes yet realized, the Contractor shall make best attempts to establish the “baseline” that will be useful in guiding future USTDA evaluation efforts. For example, U.S. companies could be asked to project their firm’s business potential in the country of delegation over the next 1-3 years. In the case of policy objectives, foreign participants (and some U.S. participants) could be asked whether progress towards the desired objective was facilitated by the USTDA-funded event.

## **H.5 Template**

USTDA will make available the necessary templates for the final report.

## **H.6 Electronic Transmittal of the Final Report**

One central email account has been established to receive all IQC report submissions. The email address is: [iqcfinalreports@ustda.gov](mailto:iqcfinalreports@ustda.gov)

The CO/COR/ACOR will advise the Contractor regarding the status of the report—whether it is approved or requires revisions. Once the CO/COR/ACOR approves the report, the Contractor may submit the final version of the report for acceptance by the Government.

The Contractor shall submit the public volume and the confidential volume as separate electronic files to the email address noted above. Contractors shall identify the Confidential Volume and any other confidential documents as such in the file name. The Contractor shall clearly mark the Public Volume as such.

Once the approved version of the final report is received, reviewed, and accepted by the Government, the CO/COR will inform the Contractor of acceptance and instruct the Contractor to submit final invoice.

**PART III – GENERAL REFERENCE SECTION**

## **SECTION - A – THE USTDA VOUCHER PAYMENT PROCESS**

### **A.1 Auditing of USTDA Contracts**

Any contract for USTDA events using USG funds is subject to audit. Actual copies of receipts, time sheets, and other documentation must be retained and made available for inspection by an auditor. Audits may be conducted up to three years after the final payment of a contract.

Therefore, all relevant documents shall be maintained for at least three years after the final payment of the contract.

### **A.2 Payments by USTDA to Contractors**

Payments to USTDA Contractors shall be paid according to the payment schedule in each Task Order.

Receipts must accompany all invoices for reimbursable costs.

All “proper” invoices (as defined in FAR 52.212-4(g) and (i)) will be paid no more than 30 days after receipt by USTDA. Upon submitting the final invoice for any Task Order, the word FINAL shall be clearly marked on all documentation.

### **A.3 ACH Wire Transfer of USTDA Funds**

Pursuant to requirements by the U.S. Department of Treasury, USTDA’s Office of Financial Management requires the completion of an ACH Vendor Payment Information form and a W-9 form to process payments. Required forms must be completed and returned to USTDA as directed by the Contracting Officer.

## **SECTION B: USTDA FORMS FOR CONTRACTOR USE**

The Contractor shall request from the COR/ACOR the following forms and templates:

- Delegate Invitation Letter Template
- Delegate Welcome Letter Template
- Form to Report Actual or Near-Term Exports Generated by USTDA
- General Letter from the Director of USTDA Template
- US Embassy Delegate Invitation Letter Template
- USTDA IQC Roster of Delegates
- USTDA IQC Event Travel Insurance Registration Form
- Final Reimbursement Invoice Template and Guidance
- Template for Final Report (Confidential Version)
- Template for Final Report (Public Version)
- Participants' List
- Checklist