



Bureau/Mission Order Template: Audio Visual Recordings

An Additional Help for ADS Chapter 502

New Edition Date: 03/17/2023
Responsible Office: M/MS/IRD
File Name: 502saf_031723

The purpose of this template is to assist Bureaus, Independent Offices, and Missions in creating a standard operating procedure for recording audio/visual meetings. Additional guidance and all mandatory policy can be found in [ADS 502mah, Policies and Procedures for Recording Audio and Video Meetings](#).

BUREAU/MISSION ORDER

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| Mission Order Number: [Control Number] | Series/Chapter: 500/ADS 502 |
| Subject: USAID Guidance for Recording Audio/Visual Meetings | |
| Effective: [Date] | Supersedes: None |

I. PURPOSE:

The purpose of this Mission Order is to establish policies and procedures relating to the audio and video recording of USAID meetings/events/training/etc.

II. AUTHORITY/REFERENCE:

[ADS 502mah, Policies and Procedures for Recording Audio and Video Meetings](#)
[ADS 502, The USAID Records Management Program](#)
[ADS 507, Freedom of Information Act](#)
[Agency Notice 06129 - Agency Policy for Recording Audio and Video Meetings](#)

NOTE: The guidance in the referenced regulations governs the [Insert Mission] operations and is not repeated in detail here. This Mission Order provides supplemental policy and procedural guidance that is specific to the [Insert Mission].

III. POLICY:

A. General

When considering establishing an audio or video recording of Mission meetings/events/training/etc. (hereafter collectively defined as “meetings”) involving USAID business, Mission employees must consider the privacy and security risks associated with such recordings, as well as the records management and Freedom of Information Act (FOIA) implications and responsibilities. Recording is prohibited for meetings that discuss (1) sensitive but unclassified (SBU) information, (2) classified information, or (3) internal deliberations. Recording is also prohibited for meetings of a purely personal nature.

Recording is allowed for meetings involving USAID business where the content is publicly releasable, such as training for members of the public (and international community), outreach meetings open to the public or industry, and large town halls where the information discussed can be widely disseminated beyond USAID, and when approved in accordance with the policies and procedures noted below. [Insert Mission] staff must not record meetings absent an articulated business need that requires recording of the meeting.

For other types of meetings, the approving official must consult with the [Office of the General Counsel (GC) or the Resident Legal Officer (RLO)] to determine specific content and any necessary notification requirements (including under local law). Once those consent and notice issues have been addressed, the approving official may authorize the recording.

Recordings are subject to the records management requirements as outlined in [ADS 502](#), the provisions set forth in [ADS 507](#), and Privacy Act rules and procedures in connection with their storage and retrieval. While the discussion and conversation at a public meeting are exempt from the Paperwork Reduction Act, any surveys conducted as part of the meeting are not exempt. Note that recordings undertaken as a measure of reasonable accommodation are handled separately from this guidance and in accordance with [ADS 111, Procedures for Providing Reasonable Accommodation for Individuals with Disabilities](#).

B. Policies

Prior approval for the recording of meetings or events must be obtained from the **[Bureau/Independent Office/Mission (B/IO/M) Assistant Administrator or Director (or their designee)]** in writing. This responsibility for **[Insert B/IO/M]** is hereby delegated to the **[B/IO Office Director or Mission Executive Officer]** in connection with internal **[B/IO/M]** meetings (e.g., town halls and similar large Mission gatherings or ceremonies, or training for the workforce). Recording of all other meetings must be cleared by **[GC or the RLO]** and approved by the **[B/IO/M Assistant Administrator or Director (or their designee)]**.

Requests for approval must articulate the business need that requires recording of the meeting. The request should include the following:

- The stated purpose of the meeting that explains the scope of the potential discussions;
- An outline of potential meeting participants (e.g. Agency employees, Implementing Partners (IPs), representatives from Host Country Governments or non-government organizations (NGOs), or the general public);
- Whether the presenter only will be speaking or both presenter and participants will be speaking;
- How consent, notice, and privacy considerations are being addressed in advance of the recording;
- If the content of the recording would be releasable in full if requested under FOIA;
- Whether Personally Identifiable Information (PII) or SBU will be discussed;
- Whether there will be a question and answer (Q&A) portion of the meeting; and
- A sample of any poll questions when polling is used.

Note: The term “workforce” refers to individuals working for or on behalf of the **B/IO/M**, regardless of hiring or contracting mechanism, who have physical and/or logical access to USAID facilities and information systems, including institutional support contractor personnel.

C. Procedures

- 1. Consent:** Requests for approval of meeting recordings must state, for meetings and training for members of the public, outreach meetings open to the public or industry, or large town halls where the information discussed can be widely

disseminated, that consent has been obtained from any presenters. For other types of meetings, the approving official must consult with [GC or the RLO] on whether there are additional consent requirements to be addressed.

- 2. Notice of Recording:** For recording events described in 1. above, the event organizer must provide advance notice of the recording to presenters and participants. The notice will include notification of the intended use of the **recording, the possible public release, and a discretion of how any participant's** PII will be handled. It will remind participants that any PII released in the meeting will be handled in accordance with Federal law and Agency privacy and security policies.

The meeting invite must include the following note:

*Per [ADS 502mah, Policies and Procedures for Recording Audio and Video Meetings](#), participants are advised that the meeting will be recorded and may be released publicly (e.g. if subject to FOIA request). Approval to record this meeting has been obtained by the **[B/IO/M Administrator or Director]** (or their designee) in line with the mandatory reference above. A reminder to all participants that absent prior approval no (1) SBU information, (2) classified information, or (3) internal deliberations should be discussed in this meeting.*

In addition, the meeting host must announce at the beginning of the meeting that the meeting will be recorded and must indicate when the recording is being initiated. If the meeting is being conducted electronically, a visible notification of the recording in progress must be displayed at all times during the meeting.

All requests for approval of meeting recordings must confirm that these notice procedures will be respected.

- 3. Recording Content:** If the information being recorded will be publicly available, the recording must not include any information that is SBU or classified, nor any internal deliberations of the **[Bureau, Independent Office, or Mission]**. Conversations involving PII should not be recorded absent a significant overarching business need. If recording a meeting that includes a question-and-answer portion, the approving official must consider whether that portion of the meeting should be recorded.
- 4. Cost Implications:** Recordings are subject to release under FOIA and to discovery in litigation. Any such release will require transcription and, potentially, editing to redact information not publicly available. All requests for meeting recordings must address how funds will be made available to cover these costs.
- 5. Storage and Accessibility:** Recorded meetings are sent to the event organizer's email shortly after the meeting ends and is automatically saved in a default location in their Google Drive under a folder called 'Meeting Recordings'. Within **[timeline (e.g., two business days)]**, the event organizer must move the automatically stored recordings from the default location to **[specify the location of the Google Drive folder at the B/IO/M level]** and use the following naming convention: **[Recording Title (Recording Date)]**. The file must be shared with 'USAID' so that recordings can be accessed.
- 6. List of Approved Meetings:** **[B/IO/M leadership and/or the designated AO]** must maintain and provide a list of meetings or events that have been approved to be

recorded to the Bureau for Management, Office of Management Services, Information and Records Division (M/MS/IRD), the Office of the Chief Information Officer (M/CIO), the Office of Civil Rights (OCR), and/or the Office of Security (SEC) upon request for auditing, compliance, records management, or in support of an investigation, information request, or FOIA request. At a minimum, the list should include the originating office, subject, and date/time of the recording.

- IV.** This **Bureau, Independent Office or Mission Order** must remain in effect until rescinded or superseded.

//B/IO/MISSION DIRECTOR'S SIGNATURE//