ADS Chapter 527

Functions of the Mission Executive Officer

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Functional Series 500 – Management Services
ADS 527 – Functions of the Mission Executive Officer
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ADS 527 – Functions of the Mission Executive Officer

527.1   OVERVIEW
            Effective Date: 05/27/2015

This chapter describes the functions of USAID Mission Executive Officers (EXOs). This chapter specifies, in detail, the responsibilities generally carried out by the Mission EXO, in order to ensure efficient, cost-effective, safe, secure, and administratively sound Mission operations and management.

The roles and responsibilities discussed in this chapter will vary from Mission to Mission, based on the stage each Mission has reached in consolidating administrative support services under the Department of State International Cooperative Administrative Support Services (ICASS) (see **Joint Management Board** and **ADS 520, International Cooperative Administrative Support Services (ICASS)**). Each EXO, Agency manager, and administrative specialist should view these guidelines as a tool to judge their appropriate role in meeting the support requirements of Agency programs and Mission functions. Section **527.5** of this chapter provides additional guidance to assist EXOs, Agency managers, and administrative specialists who participate in Mission administrative management assessments or serve on Mission opening or closeout teams.

NOTE: The responsibilities and activities discussed in this chapter are defined expansively to deal with the myriad of functions carried out by a USAID EXO in a "stand-alone" Mission overseas. In an era of rapid administrative service consolidation, many services may now be provided to a USAID Mission by an Embassy through an ICASS service-provision agreement at post. In such cases, the EXO serves as the Mission administrative liaison officer, responsible for ensuring that the ICASS service provider is meeting USAID Mission-support requirements in an efficient and cost-effective manner.

527.2   PRIMARY RESPONSIBILITIES
            Effective Date: 05/27/2015

a.   The **Executive Officer (EXO)** is responsible for specific aspects of administrative management of the USAID Mission in the following functional areas:

●   Business Management - analysis, planning, and advice;

●   Program Support;

●   Operating Expense (OE) Budget - planning, implementation, and analysis;

●   Providing advice and support to Implementing Partners, as appropriate, and as may be authorized by cognizant Mission project personnel;

●   Human Capital Management;

- Interagency Liaison and Management of the ICASS Interagency Agreement;

- Administrative and General Services;

- Information and Records Management;

- Motor pool management;

- Security and Safety; and

- Emergency Preparedness and (as appropriate) Emergency Response/Disaster Relief Operations.

The above listed responsibilities are in coordination with the Resident Legal Officer (RLO), Resident Contracting Officer (RCO), Controller, and Program Officer.

527.3   POLICY DIRECTIVES AND REQUIRED PROCEDURES

527.3.1   Functions of the Mission Executive Officer
Effective Date: 05/27/2015

The Executive Officer is a key business advisor, skilled in applying strategic planning and policy formulation tools to develop and implement management solutions supporting the USAID Mission and its program objectives overseas.

The scope of an EXO's responsibilities may be determined by the

- Size and complexity of a Mission, and the scope of country and regional programs, where they exist in each Mission;

- Extent to which the Mission's administrative support services are consolidated under ICASS; and

- Availability of local or regional support services.

The areas below reflect the responsibilities of an EXO in a stand-alone USAID Mission:

a.   Business Management, Analysis, and Planning

(1)   Serve as Senior Mission administrative management officer; formulating, interpreting, and implementing a wide-range of U.S. Government administrative policies at the Mission and development activity levels.

(2)   Advise the Mission Director on internal Mission administrative

matters requiring their action or attention, as well as those related to the provision of ICASS support services.

(3) Develop appropriate organizational structures and staffing strategies necessary to meet the program and operational requirements of the Mission; regularly evaluate the Mission's organization, staffing, and services to ensure the efficient use of material and human resources, as well as comply with **ADS 596, Management's Responsibility for Internal Control**; and consult with the Office of Human Capital and Talent Management (HCTM) on any organization and staffing changes in accordance with **ADS 102, Agency Organization**.

(4) Interpret, coordinate, and implement Mission-level responses to Agency and Bureau management initiatives.

(5) Develop internal management systems and implementing procedures, including the establishment and maintenance of a Mission directives system. The directives system may include Mission Orders and Mission Notices which supplement ADS policies and procedures to address any unique post-specific requirements.

NOTE: Mission directives must not repeat verbatim existing ADS policy and required procedures, but must refer to them. The minimum requirements for any Mission Order are: Authority, Responsibility, and Implementing Procedures. For guidance on how to prepare Mission Orders, see **ADS 527sab, Guidance on Preparing Mission Orders**.

(6) Subject to the limits established for their contracting warrant, the EXO must execute contracts, purchase orders, and operating-expense and program-funded acquisitions for Personal Service Contracts (PSC), including those for Cooperating Country Nationals (CCNs), Third Country Nationals (TCN), Off-shore PSCs, and Local PSCs in compliance with applicable Federal Acquisition Regulations (FAR) and Agency acquisition regulations and policies (see **ADS 302, USAID Direct Contracting** and **USAID Acquisition Regulation (AIDAR)**).

(7) For administrative and program contracts managed by the EXO; prepare requests and statements of work (SOW), and function or delegate the role of Contracting Officer's Representative (COR).

(8) For non-warranted actions (i.e., leases, travel, transportation, etc.), comply with procurement instructions in accordance with USAID

policies and procedures.

(9) Oversee the management of the Mission purchase and travel card program.

b. **Program Support**

(1) Actively participate as an ex-officio member of all Mission program activity teams, beginning with pre-planning stages, and through initiation, implementation, monitoring, evaluation stages, and ultimate project completion.

(2) While the EXO is expected to focus primarily on the human capital and material resource aspects of achieving the Mission's development objectives, s/he may also be expected to monitor project activities generally; concentrating on ensuring that project activities are managed in compliance with USAID regulations; that the sustainability goal remains a primary objective of project activities; and ensuring that supporting local partnerships and solutions is seen as vital to achieving both replicability and sustainability after USAID project completion.

(3) In addition, EXO activities may include the provision of general administrative advice regarding Mission support levels required to assure that project management teams and implementing partners can meet project goals with resources on hand.

(4) Participate in the formulation of Mission program development, implementation, and monitoring and evaluation policies.

c. **Operating Expense Budgetary Planning**

(1) In coordination with the Mission Controller, develop and administer the Mission's OE budget, other administrative support related budgets, and all operational costs covered by the Agency OE account via use of the Budget Formulation and Executive Manager (BFEM) tool.

(2) Collaborate with the Mission's Program and Technical Offices in formulating the annual budget resource requirements.

(3) In coordination with the Mission Controller, monitor the OE budget for compliance with the forward funding policy for non-program funds (see **ADS 602, Forward Funding, Program Funds**, **ADS 603, Forward Funding, Non-Program Funds**, and **ADS 621, Obligations**).

(4)   For Executive Office procurements, ensure on-going unliquidated obligation balance review and ensure timely deobligation of balances in excess of needs and/or no longer needed (see **ADS 621**; **ADS 302sat, Guidance on Closeout Procedures for A&A Awards**; **ADS 306, Interagency Agreements**; and **ADS 621maa, Deobligation Guidebook**).

(5)   Act as an Obligation Official (see **ADS 621**)

- Ensure operational cost/expense obligations are consistent with Agency forward funding policies;

- Regularly monitor unliquidated obligation balances (ULOs) and ensure the applicable Obligating Official/Obligations Manager timely deobligates excess or unneeded funds;

- Participate in the quarterly or annual Unliquidated Obligation Validation Exercise, conducted by the Bureau for Management, Management Policy, Budget and Performance, Budget Division (M/MPBP/BUD);

- Provide support for the Mission Director's annual certification of the validity of obligation and unexpended balances (see **ADS 621**); and

- Ensure that procurement using OE funds complies with source and nationality requirements (see **ADS 330, Source Rules for Administrative Procurement**).

d.   Administrative Support to Implementing Partners

(1)   As appropriate, supply implementing partners with advice and guidance to help them operate effectively in the host country, including advice on local salary scales and benefits established at post for locally employed staff.

(2)   Ensure implementing partners are updated on security notices issued by the Embassy's Regional Security Officer (RSO) and, as necessary, by the CO/AO. Also, support the Office of Security's (SEC) Partner Liaison Security Office (PSLO).

e.   Human Capital Management

The EXO works closely with HCTM in the areas of workforce planning; recruitment; performance management; benefits and retirement; Foreign

Service assignment process; classification; training; and all other HCTM programs. The EXO consults with HCTM on policy interpretation related to human capital management, as well as overseas benefits and allowances.

(1) Responsible for workforce planning for the Mission, including BEFM, MRR submissions, any proposed Mission level reorganizations in consultation with HCTM, and appropriate regional bureaus, and USAID/Washington backstop offices.

(2) Manage the NSDD-38 process on behalf of the Mission Director. Ensure a request via memo is sent to the Ambassador requesting concurrence for the NSDD-38. Next, develop and submit the draft NSDD-38 application to the appropriate Regional Bureau Officer for clearance within the regional bureau and subsequent forwarding to the State Department for processing. Advise HCTM Workforce Planning and HCTM Foreign Service Center Assignments Team on approvals and changes to requirements.

(3) Manage the Mission's workforce requirements by:

- Advising Mission senior managers on staffing and workforce planning issues – recommending actions and strategies to ensure maximum effective use of personnel.

- Maintaining Mission staffing pattern for CCNs as well as consolidated staffing lists to include CCNs, PSCs, U.S. Direct-Hires (USDH), and other categories of personnel.

(4) Manage the performance review process for all staffing categories.

(5) Maintain constant awareness of host-country legal and statutory rulings/updates to ensure compliance with its statutory and/or regulatory requirements affecting hiring practices and personnel entitlements, consult with the RLO as necessary; collaborate with Embassy management and the RLO to ensure that the Mission abides by host country labor laws, usually through the use of a local labor attorney; provide input on local compensation plans during annual review; and represent USAID during Retirement Fund reviews.

(6) Manage the Mission's personnel recruitment program, working closely with major stakeholders (HCTM's Foreign Service Center (FSC) and Office of Overseas Human Capital Initiatives (OHCI), post Personnel Employment Committee (PEC), Cooperating Country Nationals, etc.).

(7)   Exercise classification authority for USAID CCN positions as designated by HCTM/OHCI.

(8)   Administer the Mission's training program (including annual training plans and budgets) to ensure Mission and staff development activities support Agency goals and priorities. As appropriate, evaluate training and staff development activities for impact and, where practical, coordinate with USAID/W for the provision of local and regional course offerings for maximum participation.

(9)   Serve as representative for USAID in post Mission Awards programs.

(10)   Counsel employees and their families on a wide range of subjects, including allowances, education, housing, medical support, career development, performance planning, substance abuse, onward assignments, and professional relations.

(11)   Coordinate with Legal Officers and Controllers regarding implementation of the USAID ethics program, related training, and OGE 450 and OGE 278 submissions.

(12)   Work with Post and advise appropriate USAID-W bureaus and backstop offices on any drawdown, right-sizing, post closures, and evacuations, in order to ensure full compliance with local labor laws and all USG personnel regulations.

(13)   Oversee the timely issuance and ensure proper dissemination of arrival cables for reporting employees.

(14)   Manage the Checkout and Clearance Process at Post and ensure proper dissemination of departure cables for employees leaving post in accordance with **ADS 451, Separations**.

(15)   Coordinate the Mission's local Telework, Work Schedule, and procedures in compliance with Agency and Post guidance.

f.   Management Activities in Missions with Regional Responsibilities

(1)   Regional EXOs serve in a wide variety of Operating Units ranging from assignments to Regional Missions serving other full Missions; and Missions that cover non-presence countries under the same Mission Director.

(2)   In collaboration with the assigned office or post, the EXO must develop a Memorandum of Understanding (MOU) or Agreement

for each customer entity (Mission, country office, non-Presence country). At a minimum the MOU/Agreement must:

- In conjunction with relevant Mission officers, establish the parameters for support services and general operating procedures for financial management, acquisition and assistance, legal, administrative program, etc. provided to the partner entities by each support office; and

- Be signed by the Mission Director (or principal USAID Officer) for each supported location; and coordinated with and cleared by the heads of any support units included in the MOU (i.e. EXO, Controller, Contracting Officer, RLA, and Program Officer).

Customer entities and cognizant support offices must jointly develop service standards for all functional areas being supported; develop annual schedules for visits provided under the Agreement; specify which entities bear costs associated with specific services; develop reporting requirements after temporary duty travel (TDYs); and establish a service-management request mechanism.

g.   **Interagency Cooperative Administrative Support Services (ICASS)**

(1)   Represent Mission oversight of administration of the ICASS program, in close coordination with the Mission Controller, on ICASS management aspects that impact budgets.

(2)   Monitor, analyze, and evaluate general services functions (including leasing, facilities maintenance, real and personal property management, customs/shipping, and motor pool) provided to the Mission through ICASS; ensuring that the type, level, and charges for services conform to support agreements and USAID regulations (see **ADS 520**).

(3)   Collaborate closely with the Department of State (DOS), and other Agency management personnel to ensure efficient shared services implementation.

h.   **Administrative Management and General Services**

Where USAID is a provider of administrative services, either as a self-supporting unit or as an Alternate Service Provider (ASP) under ICASS (see **ADS 635, Working Capital Fund**), the EXO is responsible for planning and directing:

- The Mission's Residential and Office General Services

maintenance operations;

- The Mission's personal property acquisition, management, and disposal programs. Ensuring compliance with Agency standards for issuing, using, and controlling the personal property of the Mission (see **ADS 534, Personal Property Management Overseas**, and **ADS 536, Use and Control of Official Vehicles**);

- Mission motor pool operations, including the vehicle life cycle replacement program, spare parts, driver training/safety programs, and routine maintenance to ensure efficient and effective use of resources;

- Real property acquisition and management including leasing, procurement, and disposal programs. Also, serve as the leasing officer for USAID leased properties (see **ADS 535, Real Property Management Overseas**);

- In conjunction with appropriate contract and technical (architect and engineer) support personnel, manage construction of needed facilities, including review and approval of plans, specifications, designs, cost estimates, and justifications to meet all U.S. Government and host country requirements;

- Oversee the shipment and receipt of official commodities, supplies, and household effects; import and export customs clearances; oversee local and international travel reservations and ticketing; ensure that all legal and regulatory requirements are met; and manage the USAID Travel Management contract (see **14 FAM 500, Travel, Transportation and Storage** and **ADS 522, Performance of Temporary Duty Travel in the U.S. and Abroad**); and

- Oversee the administration of and compliance with the allowances and differentials benefits

  NOTE: See **ADS 533, Purchasing for USAID's Overseas Activities** for policies and procedures and a comprehensive listing of guidelines related to administrative procurements.

i.   **Information Management, Communications, and Reporting**

As the primary representative of the Management Bureau (M) in a field post, the EXO serves as the officer responsible for oversight of Mission information management systems. Working in close collaboration, and in

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compliance with policies, guidance, and direction provided by M/CIO, the EXO provides general oversight of Mission information management operations as follows:

(1) In conjunction with Mission information management (IT) technicians, manage Information Technology requirements, the mission's IT budget, and enterprise architecture. The EXO is also responsible for electronic and/or paper record management systems; including the management of system upgrades , system operations, and maintenance; all in compliance with federal and Agency laws and policies (see ADS 509, 545, 547, 549, and 550).

(2) As the Mission's Information System Security Officer (ISSO), prevent unauthorized and unnecessary access; review logs for appropriate use; oversee system operations; identify threats; take appropriate action to mitigate system damage; and implement countermeasures for manual and automated systems to ensure that all Mission systems are in compliance with Federal and Agency regulations and policies, and report all security incidents to M/CIO (see **ADS 545, Information Systems Security**).

(3) In consultation with M/CIO, identify IT requirements, including: hardware, software, data, and telecommunications. In addition, to the degree that circumstances may require, serve as Mission and M/CIO representative at post, in any IT-related discussions/negotiations with the Embassy and/or cooperating country officials.

(4) Ensure that mechanisms are in place to protect, and prevent inappropriate disclosure of, personal information; to mitigate identity theft; adjudicate complaints; address violations; specify remedies in accordance with federal and Agency laws and policies; ensure the confidentiality of Personal Identification Information (PII), system security, data integrity and availability of IT Mission knowledge and information; and immediately report any such occurrences to M/CIO, as required.

(5) Manage the Mission's communications and records program in accordance with (see **ADS 502, USAID Records Management Program)**, to include the Agency's Disposition Schedule.

(6) In coordination with cognizant USAID/W offices, implement USAID and Freedom of Information Act (FOIA) initiatives (e.g., open government and transparency initiatives).

(7) Ensure that data in WebPASS Post Personnel is accurate and up-

to-date. Respond to data calls, submit annual attestations, and coordinate with Embassy on annual Overseas Building Occupancy/Capital Security Cost Sharing requirements.

j. Security and Safety

(1) Oversee and implement security, health, and safety programs and procedures applicable to USAID personnel and facilities, collaborating closely with the appropriate DoS and USAID/W security, health and safety officials to ensure compliance with all security and safety requirements.

(2) Serve as the Mission (Unit) Security Officer and, in collaboration with the Embassy RSO and the USAID Office of Security, ensure compliance with and implementation of the security programs contained in ADS Chapters 561 through 568. Coordinate with the RSO to ensure that all personnel are familiar with required drills, including Duck and Cover and Fire Drills, and routine tests of speaker systems, and are prepared to take appropriate actions in each case.

(3) Serve as a member of the Post Occupation Safety and Health Committee; and coordinate with the Regional or Post Medical Officer, DoS Safety, Health, and Environmental Management/ Post Occupational Safety and Health Officer, (SHEM/POSHO) and General Services Officer (GSO) to implement best practices in health and sanitation.

(4) Coordinate with SEC for background investigations of USPSC contractors and coordinate with the RSO for security clearance investigations of CCN and TCN PSCs.

(5) Coordinate and cooperate with the USAID Office of Inspector General (OIG) on all investigations.

(6) Ensure that Mission staff train and practice using the security communication equipment used for the Emergency and Evacuation (E&E) net. Ensure that the Mission performs preventive maintenance on communications system equipment.

(7) Responsible for the enforcement of established Personnel Recovery (PR) procedures to ensure the safety and traceability of assigned personnel. This includes the responsibility for the maintenance, security, assignment, and recovery of signal devices and all other related equipment on a day-to-day basis.

(8) Coordinate with the RSO and oversee all staff training in support of required security policies and procedures.

(9) Coordinate with one or all of the following; Emergency Action Committee (EAC), RSO, and SEC on the selection, purchase, use, maintenance, repairs, life cycle, drivers training, accountability, and destruction of Level C and D armored vehicles. The primary point of contact for an EXO is the SEC on all armored vehicle issues.

(10) Coordinate with SEC to install and maintain access control equipment, forced entry/ballistic resistant (FE/BR) doors and windows, close circuit television (CCTV) systems, public address system, imminent danger notification system (IDNS), alarm systems, key watcher system, medico locks & keying, walk through metal detectors (WTMD), active and passive anti-ram barriers, X-ray machines, and explosive trace detection units, security communication systems, and personnel recovery equipment systems.

k. Emergency Preparedness and (where applicable) Emergency Response Operations/Disaster Relief Operations

(1) Serve as USAID officer responsible for ensuring that USAID-specific emergency response plans and procedures are fully compatible with Post plans and procedures; promote first responder training for all USAID personnel at post; and, as may be appropriate, in coordination with Embassy personnel, establish an alternate communications and support center for use in case of emergency.

(2) Coordinating closely with Post Management, administer logistics for emergency evacuations, lock down, and temporary Mission shut down.

(3) In the absence of any other USAID officer so designated, serve as Mission Disaster Relief Officer; preparing, updating and implementing the Mission Disaster Recovery plan.

(4) Serve as a member of the Post Emergency Action Committee; participate in preparation and updating of post emergency action plans; and serve as USAID action officer, implementing emergency action and/or drawdown plans as may be determined necessary.

527.3.2 EXO and Mission Controller Functions
Effective Date: 05/27/2015

Mission Executive Officer and Controller functions represent separate and distinct

professional skills and management controls and must not be combined, except as noted in paragraph **c.** below.

a. The EXO and the Controller must maintain close coordination for OE and program-funded administrative budget formulation and execution as well as ensure availability of funds to meet budget requirements.

b. The EXO and the Controller must maintain close coordination for spending transactions in the Agency accounting system, to include obligation, disbursement, accruals, de-obligation, and annual certifications.

c. Under special circumstances of a temporary nature (for example, where USAID is starting-up or phasing-out a Mission), the possibility of a combined Controller/EXO function may be considered, along with alternative possibilities for providing EXO services regionally or through TDY assistance. If a Mission Director believes these functions can be combined, s/he sends their recommendation to the appropriate USAID/W Geographic Bureau, including reference to the means by which the Mission expects to maintain the separation of the "obligating" and "certifying" functions of those two positions. The Bureau must then determine approval with the concurrence M/MS/OMD Office Chief, and the M/CFO Chief Financial Officer.

527.3.3 EXO and Program Officer Functions
Effective Date: 05/27/2015

There may be rare occasions at some of the Agency's smaller-staffed Missions where a qualified EXO performs both administrative and program support functions in a combined EXO-Program position. This scenario requires a multi-functional Foreign Service Officer who possesses many of the basic skill-sets required of EXOs and Program Officers. For example, in a combined EXO-Program environment, many administrative support services would be provided by an ICASS service provider or otherwise outsourced, while the USAID Executive Office would retain service coordination and oversight responsibilities, and possibly some procurement/contracting and personnel functions for the Mission.

If the Mission believes these functions can be combined, the Mission Director will send a recommendation to the appropriate USAID/W Geographic Bureau, which must determine approval with the concurrence of the AA/M and the M/MS/OMD Office Chief.

527.3.4 EXO Relationships with Embassy Administrative Offices and Other U.S. Government Agencies
Effective Date: 05/27/2015

As a general rule, the EXO routinely collaborates with the Embassy Management Officer/Counselor, General Services Officers, Budget and Finance Officer, and Human Resources Officer on matters pertaining to U.S. Mission management, interagency collaboration, and services procured through ICASS.

As an active participant, and in collaboration with the Mission senior staff in the interagency decision-making processes, the EXO represents and advocates on behalf of USAID on interagency committees and on other US Mission working groups, contributing to US Mission-wide policy, reports, documents, and activities, such as "rightsizing" exercises, US Mission requests for resources, and high-level/VIP visits.

The EXO participates in Post-level reviews (coordinated by the DoS Office of Allowances) related to authorization of post allowances, danger pay, cost-of-living allowances (COLA), per diem, and other changes in post specific entitlements. The EXO also liaises with the Embassy Administrative Offices and monitors the quality and quantity of services agreed upon and provided under the ICASS system.

The EXO serves on interagency committees and panels, such as:

- Interagency Housing Board (IAHB),

- Eligible Family Member (EFM) employment committee,

- Local ICASS council working groups and committees,

- Emergency preparedness and response committee,

- Mission resource planning and performance review committees,

- Mission and interagency awards committees,

- Property Survey Board, and

- CCN compensation surveys.

527.3.5   EXO Relationships with M/MS/OMD and Other USAID/W Offices
Effective Date: 05/27/2015

The EXO liaises with M/MS/OMD regarding the interpretation and clarification of approved policies and procedures at posts abroad and, when necessary, requests M/MS/OMD to arbitrate policy implementation issues.

The EXO works closely with M/MS/OMD technical specialists in the areas of nonexpendable property, real property, procurement, and policy management. When practical, the EXO may request M/MS/OMD to act as a liaison between the Mission, USAID/W, and DoS, or other public and private sector entities regarding security and procurement issues.

The EXO will also rely on M/MS/OMD, to the extent that management-related issues and projects require, to liaise and coordinate with Regional Bureaus, HCTM, SEC, and other M Bureau offices, such as:

- M/CIO;

- M/CFO;

- M/MPBP;

- (M/OAA); and

- M/MS, including its three divisions:
  - Travel and Transportation Division (TTD),
  - Information and Records Division (IRD), and
  - Headquarters Management Division (HMD)

as may be necessary to ensure full compliance with USAID regulations and requirements.

527.4 MANDATORY REFERENCES

527.4.1 External Mandatory References
Effective Date: 05/27/2015

a. **14 FAM 500 Employee Logistics**

b. **Federal Acquisition Regulation (FAR) Parts 1-52**

c. **Foreign Assistance Act (FAA) of 1961, as amended**

d. **Foreign Service Act (FSA)**

527.4.2 Internal Mandatory References
Effective Date: 02/20/2024

a. **ADS 101, Agency Programs and Functions**

b. **ADS 102, Agency Organization**

c. **ADS 103, Agency Programs and Functions**

d. **ADS 109, Ethics and Standards of Conduct**

e. **ADS 302, USAID Direct Contracting**

f. **ADS 330, Source and Nationality Rules for Administrative Procurement**

g. **ADS 331, USAID Worldwide Purchase Card Program**

h. **ADS 451, Separations and Exit Clearance**

i. **ADS 502, the USAID Records Management Program**

j. **ADS 509, Management and Oversight of Agency Information Technology Resources**

k. **ADS 520, International Cooperative Administrative Support Services (ICASS)**

l. **ADS 522, Performance of Temporary Duty Travel in the U.S. and Abroad**

m. **ADS 527maa, Administrative Guidance on How to Open an Overseas Operating Unit**

n. **ADS 527mab, Administrative Guidance on How to Close a USAID Operating Unit – Checklists**

o. **ADS 527mac, Organizational Effectiveness Reviews**

p. **ADS 533, Purchasing for USAID's Overseas Activities**

q. **ADS 534, Personal Property Management Overseas**

r. **ADS 535, Real Property Management Overseas**

s. **ADS 536, Use and Control of Official Vehicles**

t. **ADS 545, Information Systems Security**

u. **ADS 547, Property Management of Information Technology (IT)**

v. **ADS 561-568, Security**

w. **ADS 601, Funding Source Policy**

x. **ADS 602, Forward Funding, Program Funds**

y. **ADS 603, Forward Funding, Non-Program Funds**

z. **ADS 621, Obligations**

aa.   **ADS 634, Administrative Control of Funds**

ab.   **Agency for International Development Acquisition Regulations (AIDAR)**

ac.   **CIB 90-12, Guidance for AID Missions – Closing Out Contracts, Grants and Cooperative Agreements, and other relevant AAPDs and CBs, as included in http://www.usaid.gov/work-usaid/aapds-cibs.**

527.5   ADDITIONAL HELP
Effective Date: 08/02/2023

a.   **ADS 527sab, Guidance on Preparing Mission Orders**

b.   **ADS 527sac, Management Services Review Guidelines (MSRG) and Executive Officer Transition Guidance**

c.   **ADS 527sad, Sample Administrative Operational Close-Out Plan**

d.   **ADS 527saf, Staffing Organizational Effectiveness Review (OER) Teams**

e.   **ADS 527sag, Organizational Effectiveness Reviews Data Sources**

f.   **ADS 527sah, Interview Methods and Tips**

g.   **ADS 527sai, Extracting Content from Organizational Effectiveness Reviews**

h.   **ADS 527saj, Recommendation Implementation Project Plan**

527.6   DEFINITIONS
Effective Date: 05/27/2015

The terms and definitions listed below have been included into the ADS Glossary. See the **ADS Glossary** for all ADS terms and definitions.

communications and records (C&R)
Planning, controlling, directing, organizing, training, promoting, and other managerial activities related to the creation, maintenance and use, and disposition of records. The purpose of communications and records is to achieve adequate and proper documentation of Federal policies and transactions and effective and economical management of Mission operations. (**Chapter 527**)

contract management
The management and direction of USAID's procurements, including implementation of USAID's unique procurement policies, regulations, and standards in both USAID/W and overseas. (**Chapter 527**)

Executive Officer (EXO)

A term used by some agencies to identify the officer responsible for administrative and program support activities. (6 FAM 700) (**Chapters 527 and 535**)

general services
Services provided in the areas of travel, transportation, supply, property management, procurement, security, and housing/office management. (**Chapter 527**)

International Cooperative Administrative Support Service (ICASS)
The International Cooperative Administrative Support Services (ICASS) system is the principal means by which the U.S. Government provides and shares the cost of common administrative support at its more than 250 diplomatic and consular posts overseas. The Department of State is the primary service provider and it offers these administrative support services to other agencies under its non-Economy Act authorities contained in 22 USC 2695 and 2684. ICASS is, for the most part, a voluntary system. Agencies select from a list of cost centers (which are "bundles" of services) which services they would like to receive via the ICASS system. Agencies may obtain services from non-ICASS sources or self-provide services as long as there is no duplication of the ICASS platform. (Chapters **520, 527, 635**)

leasing
Entering into a contract to convey real estate, equipment, or facilities for a specified term and for a specified rent, from one entity or person to another. (**Chapter 527**)

Operating Expense (OE) budget
The Agency's Congressional appropriated funds for administrative support expenditures for a specified fiscal year. (**Chapter 527**)

personal property management (PPM)
Management of the Agency's non-real estate property. It involves ordering, receiving, storage, utilization, accountability, warehousing, and disposing of such property. (**Chapters 518 and 527**)

real property acquisition
The act of acquiring real property by either lease or purchase. (**Chapters 518 and 527**)

security and safety
Protection of the well-being of USAID employees, facilities, and classified or sensitive information. (**Chapters 527 and 529**)

travel
Travel means the official travel and transportation of employees and their dependents and effects. It also includes the administration of allowances and benefits to employees assigned to overseas posts. (**Chapter 527**)

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