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ADS Chapter 112

Standard Operating Procedures for Task Forces

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 ADS 112 – Task Force Standard Operating Procedures
 POC for ADS 112: Thomas Hand, (202) 921-5039, thand@usaid.gov

Table of Contents

<u>112.1</u>	<u>OVERVIEW.....</u>	<u>3</u>
<u>112.2</u>	<u>PRIMARY RESPONSIBILITIES.....</u>	<u>3</u>
<u>112.3</u>	<u>POLICY DIRECTIVES AND REQUIRED PROCEDURES.....</u>	<u>6</u>
<u>112.3.1</u>	<u>What Is a Task Force?</u>	<u>6</u>
<u>112.3.2</u>	<u>Composition and Staffing.....</u>	<u>7</u>
<u>112.3.3</u>	<u>Activation Criteria</u>	<u>8</u>
<u>112.3.4</u>	<u>Functions of a Task Force.....</u>	<u>9</u>
<u>112.3.4.1</u>	<u>Programmatic.....</u>	<u>9</u>
<u>112.3.4.2</u>	<u>Financial Management.....</u>	<u>10</u>
<u>112.3.4.3</u>	<u>Acquisition and Assistance (A&A).....</u>	<u>10</u>
<u>112.3.4.4</u>	<u>Budgetary Planning.....</u>	<u>11</u>
<u>112.3.4.5</u>	<u>Communications and Reporting</u>	<u>11</u>
<u>112.3.4.6</u>	<u>Coordination of Policy and Strategy</u>	<u>12</u>
<u>112.3.4.7</u>	<u>Knowledge-Management</u>	<u>12</u>
<u>112.3.4.8</u>	<u>Monitoring and Evaluation</u>	<u>13</u>
<u>112.3.5</u>	<u>Deactivation and Transition</u>	<u>13</u>
<u>112.4</u>	<u>MANDATORY REFERENCES.....</u>	<u>16</u>
<u>112.4.1</u>	<u>External Mandatory References.....</u>	<u>16</u>
<u>112.4.2</u>	<u>Internal Mandatory References.....</u>	<u>16</u>
<u>112.5</u>	<u>ADDITIONAL HELP.....</u>	<u>16</u>
<u>112.6</u>	<u>DEFINITIONS.....</u>	<u>16</u>

ADS 112 – Task Force Standard Operating Procedures

112.1 OVERVIEW

Effective Date: 06/16/2020

This chapter establishes the criteria for activating, transitioning, and deactivating a USAID Task Force; and the responsibilities and functions of a USAID Task Force.

During its operation, a Task Force serves as the Agency’s primary recipient and clearinghouse for all relevant information connected to the crisis or situation for which the Administrator established it. The Task Force also assists USAID’s leadership with effective coordination, consistent messaging, informed decision-making, and strategic alignment of the Agency and the U.S. Government’s priorities that pertain to the matter for which the Task Force exists. This chapter aligns with existing structures, such as procedures for Continuity of Operations (COOP) ([ADS Chapter 531](#)), the protocols for the [Administrator’s Crisis Action Team \(ACAT\)](#), and the Response Management System (RMS) within the Bureau for Humanitarian Assistance (BHA) (<https://sites.google.com/a/usaid.gov/rms-information/>), and is not intended to supersede the authorities, procedures, and protocols of these structures.

This ADS chapter applies to all Task Forces established by USAID.

112.2 PRIMARY RESPONSIBILITIES

Effective Date: 07/24/2020

- a. The **Administrator (A/AID)** authorizes the establishment of all Agency Task Forces and appoints an Executive Director to lead each one. The Administrator and/or the **Deputy Administrator, or his/her designee**, will engage on high-level U.S. Government (USG) policy issues, interagency deliberations and decisions, and/or interest from Congress, diaspora communities, local and state governmental authorities, media, and others.
- b. A **Task Force**, when activated by the Administrator, is an integrated platform that facilitates the Agency’s response to a crisis or emerging crisis. It is responsible for developing Agency-level crisis-response strategies, proposing action, and delegating and coordinating the Agency’s response. USAID uses Task Forces to improve collaboration in the Agency and with the USG interagency and external stakeholders to achieve crisis-response goals. A Task Force’s size and duration will vary at the Administrator’s discretion, depending on the scope, size, and duration of the crisis. The composition and structure of a Task Force should be scalable, flexible, and adaptable. The leadership of a Task Force should consider membership from affected Missions and field offices and representatives from other USG departments and agencies, in addition to representatives from stakeholder Bureaus and Independent Offices (B/IOs) in USAID.
- c. The Administrator names an **Executive Director** when activating a Task Force. The Executive Director acts as USAID’s primary interagency interlocutor for the crisis, and is responsible for leading the Task Force, including by setting operational speed,

assigning responsibilities, and guiding Task Force members. Working closely with the Office of Human Capital and Talent-Management (HCTM) and the Administrator, the Executive Director appoints staff to the Task Force to ensure it can accomplish its purpose and functions. The Executive Director is responsible for the Task Force's execution and the documentation of key management, financial, programmatic, and policy decisions and actions. The Executive Director is also responsible for the Task Force's learning during its operation, for ensuring knowledge-transfer upon turnover or transition, and for conducting an After-Action Review (AAR) upon deactivation and transition.

d. The **Bureau for Management (M)** is responsible for the **Task-Force Readiness Unit (TFRU)** that **coordinates** the establishment of a Task Force and, as applicable, interagency logistics, staffing, and communications when the Administrator activates a Task Force; **works** with applicable B/IOs to activate/deactivate a Task Force; and **works** with the Executive Director and other members to formulate a Task Force's objectives and processes.

The TFRU **is** also responsible for the following:

- Recommending resource requirements for a Task Force;
- Providing budgetary and staffing models;
- Liaising with other B/IOs, as appropriate, on budgetary and other resource requirements, as well as with internal and external entities on logistics needs (space/location, equipment, information technology, templates, and staff roles, such as position descriptions and scopes of work);
- Developing and coordinating staff training on crisis response;
- Establishing a cadre of subject-matter experts on whom the Agency could call at short notice to assist Task Forces;
- Providing ongoing procedural guidance to a Task Force's Executive Director and members throughout the life cycle of the Task Force;
- Coordinating reporting and knowledge-management requirements, including developing and maintaining a knowledge-management platform for Task Forces to use;
- Synthesizing relevant learning from past AARs to share with a Task Force to inform its work; and
- Working with a Task Force's Executive Director to conduct AARs and manage audits and evaluations.

The **Bureau for Management, Office of Management Policy, Budget and Performance (M/MPBP)** oversees the responsible allocation and stewardship of Operating Expense (OE) funds in the course of the operations of Task Forces.

The **Bureau for Management, Office of Acquisition and Assistance (M/OAA)** informs a Task Force of assistance and/or acquisition (A&A) actions in progress, provides information on available A&A vehicles, puts in place any available waivers or authorizations that might be needed to expedite procurement or assistance, and disseminates solutions to help the Task Force prioritize A&A actions and reduce duplication of effort.

The **Bureau for Management, Office of the Chief Financial Officer (M/CFO)** supports a Task Force to provide proper audit documentation and identifies potential outstanding audit recommendation(s) that would affect the operations of the Task Force.

e. Bureaus/Independent Offices (B/IOs) provide early, substantive input to a Task Force related to programming and planning in response to a crisis. Regional and Pillar Bureaus and IOs address the impact on current programming and staffing and identify gaps and possible resources, in consultation with other B/IOs and the Office of Budget and Resource-Management. Regional and Pillar Bureau Assistant Administrators (AAs) and IO Directors coordinate with a Task Force on staffing and resources.

f. The Bureau for Humanitarian Assistance (BHA) is responsible for keeping the Task Force updated on current crisis-response activities of any relevant, activated Disaster Assistance Response Teams (DARTs) and/or Response Management Teams (RMTs), and for managing activities consistent with [ADS Chapter 251, International Disaster Assistance](#) and [ADS Chapter 530, Emergency Planning Overseas](#).

g. The Bureau for Legislative and Public Affairs (LPA) is responsible for keeping a Task Force updated on communications and legislative needs and requirements. LPA communication representatives and press officers will compile, compose, and disseminate information to the media, other U.S. Government press officers and Congressional staff, the entire Agency workforce, and the general public about USAID's and the overall U.S. Government's role and actions in the crisis. LPA's Congressional Liaison Officers should take similar actions to provide information to Members of Congress and their staff and answer Congressional inquiries, as well as communicate Congressional concerns and priorities back to the Task Force.

h. The Office of the General Counsel (GC) provides legal advice on a broad range of matters related to the establishment and operations of any Agency Task Force. GC should participate early in the planning phase for a Task Force and will advise on law and policy relevant to the Task Force's staffing and operations and on statutory restrictions and requirements applicable to the Task Force's work, among other things.

i. The Office of Security (SEC) provides information and guidance regarding security incidents that affect personnel at USAID Missions and/or staff of implementing

partners. As appropriate, a SEC representative liaises with the State Department's Bureau of Diplomatic Security (DS) and provides intelligence briefings and analysis to a Task Force. SEC will provide immediate access-control decisions and verify clearances for visitors and/or interagency staff who are supporting the Task Force.

j. The **Office of Human Capital and Talent Management (HCTM)** provides support for detailed or directed reassignment positions for Task Forces, for Agency Operating Units affected by Task Force staffing, for "authorized" (voluntary) and ordered departures, and for Staff Care services.

k. The **Office of Civilian-Military Cooperation (CMC) in the Bureau for Conflict Prevention and Stabilization (CPS)** supports Task Forces that require coordination with the Department of Defense not related to humanitarian assistance. CMC support could include Civil-Military Coordinator(s) with the aligned region(s) and affected Combatant Command(s) (COCOMs), the Military Representative(s) from the Combatant Command(s) aligned with the region(s) affected, and other technical staff. Additionally, Senior and Deputy Development Advisors with the aligned region(s) and affected COCOM(s) may provide support virtually. The Senior and Deputy Development Advisors in the Pentagon may provide support where high-level engagement with the Office of the Secretary of Defense and/or the Joint Staff is required.

l. The **Office of Budget and Resource Management (BRM)** is responsible for USAID's program resource and budget planning, oversight, and coordination and provides support for all program resource-related matters regarding Agency Task Forces. BRM works with B/IOs to identify resource gaps and possible resources to address such gaps. In circumstances in which the Agency requires program funding beyond normal appropriations for a disaster response, for example immediate funding shifts, a supplemental funding request, and/or an emergency appropriation, BRM works with relevant B/IOs, GC, LPA, and the Executive Director of a Task Force to identify program funding trade-offs and prepare USAID's supplemental request.

m. **USAID Mission(s)** are responsible for providing situational updates to a Task Force, including Mission operational status; staffing needs; resource requirements; updates on Mission activities; and impact to programs. Each relevant Mission Director will identify technical and subject-matter experts who can serve as virtual members of the Task Force. Missions should continue to follow procedures outlined in [ADS Chapter 530, Emergency Planning Overseas](#), to address emergency situations at Post.

112.3 POLICY DIRECTIVES AND REQUIRED PROCEDURES

112.3.1 What Is a Task Force?

Effective Date: 02/10/2020

A Task Force is a cross-Agency team established in response to a crisis or emerging crisis. It is a limited-term unit for developing crisis-response strategies, proposing action,

and delegating and coordinating the Agency's response. A Task Force is intended to be an integrated platform to facilitate a coordinated Agency response to a crisis. USAID uses Task Forces to improve collaboration inside the Agency and with the USG interagency and external stakeholders to achieve the goals of a crisis response.

Task Forces are not implementing entities. While a Task Force coordinates USAID's response to a given crisis, affected B/IOs retain their authorities and implementation responsibilities to achieve measurable objectives. A Task Force is not intended to supersede the authorities, procedures, or protocols of other Agency crisis-response structures.

The Administrator establishes a Task Force through approving an Action Memorandum and an Executive Message, in which he or she designates an Executive Director to lead the Task Force. The term "Task Force" should not be used throughout the Agency for anything other than an official, Administrator-declared Task Force. Other terms should be used instead for time-limited Agency work groups, such as "working group," "community of experts," etc.

A Task Force may remain active for up to one year, or until the situation no longer warrants such a unit. If a longer response coordination effort is necessary, the Agency might need to transition a Task Force to a more permanent structure. After one year, in coordination with the Task Force Executive Director, affected B/IOs, and GC, the TFRU will assess the continued need for the Task Force and recommend its continuation for an additional period of time or other options for transition.

112.3.2 **Composition and Staffing** Effective Date: 07/24/2020

An Executive Director will lead each Task Force. The Executive Director, with the assistance of deputies as needed, will act as primary interagency interlocutor, provide overall leadership for the Task Force, set the meeting schedule and operational speed, and assign responsibilities by guiding the Task Force's members through the necessary checklists and duties. The TFRU will support the Executive Director, who, working closely with the Administrator and HCTM, has the authority to assign staff to a Task Force to ensure that the purpose of the Task Force can be accomplished, as well as address the Task Force functions outlined in **Section 112.3.4**. The Agency must staff each Task Force sufficiently to facilitate or ensure sufficient reporting and documentation of key management, financial, programmatic, and policy decisions and actions.

Depending on the impact and scope of the challenge, the size and duration of a Task Force will vary at the discretion of the Administrator, but its duration generally should not exceed one year. A Task Force's composition and structure should be scalable, flexible, and adaptable and may evolve based on the scope, size, and duration of the crisis.

Generally, stakeholders with equities in Task Forces will include the following:

- Agency Front Office;

- Affected Regional and Pillar Bureaus;
- Bureau for Management (M);
- LPA;
- BRM;
- HCTM;
- GC; and
- SEC.

A Task Force will consist of core staff and non-core staff, depending on circumstances and needs as determined by the Executive Director. Core staff will normally serve the Task Force on a full-time basis, while non-core staff is advisory or intermittent. A Task Force may activate non-core staff for specific periods as core members.

The TFRU, in conjunction with HCTM, facilitates efficient and timely detailing and hiring processes. The TFRU will provide a Task Force with sample Memoranda of Understanding, functional position descriptions, and statements of work. The TFRU will develop Agency-wide training to build a cadre of trained staff who could be activated immediately to support the response to a crisis. The TFRU also will develop a roster of individuals, pre-screened for key skills, who are under contract and could be activated immediately for intermittent service, such as a ready reserve, to shorten the time to recruit support for a Task Force.

112.3.3 Activation Criteria

Effective Date: 02/10/2020

Most or all of the following descriptors characterize a crisis that requires broad Agency support or coordination across multiple B/IOs and the interagency:

- a. An unusually complex or large-scale crisis that requires an Agency response that exceeds the abilities of any responsible Bureau or combination of Bureaus to operate and coordinate normally;
- b. A crisis that has significant interest from, and engagement with, the White House, the National Security Council (NSC), Congress, and/or the interagency;
- c. A crisis in which the Agency plays a significant or leadership role within the interagency response; and/or
- d. A crisis that requires prolonged intervention and monitoring.

In the case of an ongoing crisis response that meets some or most of the above criteria, affected B/IOs initiate, or are asked to initiate, the establishment of a Task Force by submitting an Action Memorandum to the Administrator to recommend the activation of a Task Force. The Action Memorandum must include clearly stated objectives and rationale for the Task Force (e.g., how the demands exceed the capacity of the Agency to respond through existing structures). Upon the Administrator's declaration, the Office of the Executive Secretariat (ES) will issue an Executive Message to announce the activation of the Task Force officially.

112.3.4 Functions of a Task Force

112.3.4.1 Programmatic

Effective Date: 02/10/2020

A Task Force is not an implementing unit. A Task Force is responsible for Agency-level strategic oversight and the coordination of program-related decisions and actions that are directly related to the Task Force's crisis of focus. This responsibility requires substantial internal coordination with relevant Regional and Pillar Bureaus, IOs and Missions, all of which retain significant programmatic and operational management responsibilities. In its programmatic function, a Task Force should tackle questions such as:

- How best to prioritize and/or de-conflict ongoing programs and new ones?
- What are the near-term and long-term requirements for the Agency and the USG, associated resource implications, and how will impact be evaluated?
- How can USAID and the USG build and structure crisis-response to account for the eventual need to transition to a different type of recovery programming or to a more sustainable mode of operating?
- Has the Agency developed a strategy to address the crisis and, if so, do the activities proposed align with the strategy?

A Task Force will serve as the central focal point for all requests related to the crisis, including from Missions, the interagency, and external stakeholders. The Task Force will coordinate, devise, maintain, and/or delegate a system to manage all requests for field assistance and will communicate that process to Agency employees, the interagency and the public. If the Agency stands up a DART or RMT alongside a Task Force, close coordination between the two will be paramount.

A Task Force oversees the coordination of programmatic and resource-related discussions with the Office of Management and Budget (OMB), the NSC, other USG Departments and Agencies, Congress, and external stakeholders. The Task Force must anticipate and prepare for the expected level of interaction with all such interagency, governmental, and non-governmental stakeholders. When USAID is the lead USG agency for a given crisis or set of crisis-response tasks, the Task Force must clarify the

roles and the support services that different USG departments and agencies should provide.

112.3.4.2 Financial Management

Effective Date: 02/10/2020

The urgency associated with crisis response can generate financial-management challenges. For example, emergency funding appropriations often come with constraints on how the Agency may use them, and the practice of shifting funds among activities can trigger accounting or fiscal-law challenges or require additional Congressional Notifications. The B/IOs accountable for the financial-management functions related to the work of a Task Force maintain fiduciary responsibility for managing them.

The Task Force's role is to ensure a coordinated response so that the Agency completes the actions necessary for responding to a crisis, including sufficient financial documentation. To expedite USAID's response while adhering to Federal requirements, the Task Force will disseminate guidance to affected stakeholders. The Executive Director of a Task Force must also ensure the sufficient documentation of response activities to provide a sound audit trail. External scrutiny of a Task Force's decision-making by the Office of the USAID Inspector General (OIG), the Government Accountability Office (GAO), the media, and others is a given. Audits of Task Forces by the OIG and the GAO are common. A Task Force should plan for an audit from the beginning, including by maintaining proper documentation and identifying staff to liaise with the OIG (and/or the GAO) to strengthen the coordination of, and responsiveness to, audits. The Executive Director must document all decisions clearly for messaging, management, and audit purposes.

112.3.4.3 Acquisition and Assistance (A&A)

Effective Date: 02/10/2020

As the Agency responds to complex crises, ongoing development programs will need to harmonize with new crisis-response activities to the greatest extent possible. In some instances, the Agency's primary emphasis will be on executing new acquisition (contracts) and assistance awards to deliver response activities. At other times, the Agency will need to modify existing implementing mechanisms to re-orient ongoing programs to crisis response. The Agency will put in place any available waivers or authorizations that might be needed to expedite procurement or assistance.

To coordinate USAID's response to a crisis, a Task Force will provide a strategic overview of the portfolio of response efforts planned and underway, which will require an understanding of intended A&A actions. A Task Force's coordination role does not change or diminish the roles or authorities of staff on specific A&A awards. Contracting/Agreement Officers (CO/AOs) and Contracting/Agreement Officers' Representatives (COR/AORs) remain cognizant and responsible for their respective awards. However, by maintaining awareness of actions in progress, sharing information on available A&A vehicles, and disseminating solutions identified by other stakeholders, a Task Force will help prioritize A&A actions and reduce duplication of effort.

Where appropriate, the Task Force will assist affected B/IOs with the development and approval process for justifications and waivers. As needed, the Task Force should provide a system to manage the distribution of crisis-related unsolicited proposals to the affected B/IO(s) for disposition. When, in the context of a crisis response, the Agency uses Interagency Agreements to formalize coordination with other Federal Departments and Agencies, the Task Force will ensure that these agreements specify response operational details; clearly define the roles, responsibilities, and reporting requirements; and ensure a common understanding of standardized language consistent with [ADS Chapter 306, Interagency Agreements](#). The Agency's standing preference is to execute Interagency Agreements in a crisis under Section 632(b) of the Foreign Assistance Act (FAA), as amended, rather than Section 632(a) of the FAA.

112.3.4.4 Budgetary Planning

Effective Date: 02/10/2020

The Executive Director may be required to identify short- and long-term budget needs based on information collected from the Executive Director, Task Force, external stakeholders, and the USG interagency. If the Agency requires funding beyond normal appropriations for a response to a crisis, the Task Force might require immediate funding shifts, a supplemental funding request, and/or an emergency appropriation. In this scenario, the Executive Director and BRM (for program funds) and/or M Bureau (for Operating Expense funds), in consultation with GC, LPA, and others, as appropriate, are responsible for identifying short-term funding trade-offs and preparing the supplemental funding request for USAID, with relevant B/IOs working closely with BRM and/or M Bureau to define requirements and draft a justification.

LPA will take the lead on communicating with Congress on resource issues. The Executive Director of a Task Force must ensure sufficient documentation of key decisions to provide a sound audit trail. A Task Force must be mindful of external scrutiny by the OIG, the GAO, the media, and others of resource allocations, as well as other decisions taken by a Task Force.

112.3.4.5 Communications and Reporting

Effective Date: 02/10/2020

A Task Force must respond to substantial reporting requirements to Congress and other external stakeholders. Typical reporting requirements are fact sheets, financial reporting, quantification of beneficiaries, staffing reports, and performance measures. The Task Force will not undertake all of such reporting itself but is responsible to ensure that the Agency completes all necessary reporting. For example, the Task Force needs to ensure the Agency tracks all emergency funding the Agency obligates into existing mechanisms separately, by country, and collects all work plans and other data to meet reporting requirements.

Audits of Task Forces by the OIG and the GAO are common. A Task Force should plan for an audit from the beginning, including by maintaining proper documentation and

identifying staff to liaise with the OIG (and/or the GAO) to strengthen the coordination of and responsiveness to audits. The Executive Director must ensure the clear documentation of key decisions for messaging, management, and audit purposes.

As noted in **Section 112.3.2**, upon the Administrator's declaration of a Task Force, ES, in conjunction with LPA, will issue an announcement as an Executive Notice. The Task Force must regularly communicate to Agency leadership on its work through appropriate fora, including routine meetings with the Administrator and senior leadership of stakeholder B/IO and relevant Missions. The Task Force should also provide regular updates to Agency employees as the subject matter warrants and resources permit.

All stakeholders must understand a Task Force's chain of command for clearing information and reports for internal and external sharing. Standard reporting templates are useful to quickly deliver daily updates both internally and externally.

112.3.4.6 Coordination of Policy and Strategy

Effective Date: 02/10/2020

A Task Force is responsible for Agency-level strategic oversight and coordination of decisions related to policy and strategy directly related to the crisis for which the Administrator activated it. This responsibility requires substantial internal coordination with relevant B/IOs (especially the Bureau for Policy, Planning and Learning (PPL)) and Missions. Given the likely interagency nature of a crisis response that warrants an Agency Task Force, a Task Force must oversee the coordination of policy and strategy discussions with OMB, the NSC, other USG departments and agencies, Congress, and other external stakeholders. The Task Force must anticipate and prepare for the expected level of interaction with all interagency, governmental, and non-governmental stakeholders. In situations in which USAID is the lead U.S. Government Agency for a given crisis or set of crisis-response tasks, the Task Force must clarify the roles and the support services that different USG Departments and Agencies should provide toward the development of policy and strategy.

112.3.4.7 Knowledge-Management

Effective Date: 02/10/2020

Knowledge is a valued asset that a Task Force must store, manage, retain, and transfer properly so the Agency is continuously learning and building best practices to improve its performance, and sharing its learning with other relevant actors.

The TFRU will determine the knowledge-management system of record that all Task Forces will use. This common system will ensure that knowledge is accessible and transferred from successive Task Forces. The TFRU will lead proper training for those responsible for the implementation of such system. Each Executive Director is responsible for creating and preserving records that adequately and properly document the decisions, procedures, and policies of the Task Force, as laid out in [ADS Chapter 502, The USAID Records Management Program](#). Each Task Force must appoint a Records Liaison Officer to manage records and documents of key decisions. Upon

deactivation of the Task Force, the Executive Director must ensure these records and documents migrate to the TFRU. However, if a Task Force transitions responsibilities to a B/IO, the Task Force, in coordination with the TFRU, will pass a complete set of official records to the Records Liaison Officer in the receiving B/IO and to ES.

USAID intentionally embeds a strong emphasis on continuous learning and adaptive management in all of its programming and operations. An Executive Director should begin the learning process as soon as practicable following the initiation of a Task Force and continue on a rolling basis (through interviews, peer learning exchanges among Task Force members and subject matter experts, analytic exercises, etc.) throughout the life of a Task Force to enable synthesis of technical and experiential learning, application of learning, and course-correction for improved outcomes. Given the usually temporary and fluid nature of staffing Task Forces, the Executive Director must ensure that knowledge transfers between people and is captured for future use to ensure continuity and success.

AARs are an Agency best practice to document lessons-learned and identify weaknesses as well as practices on which to build. An Executive Director must ensure the Task Force considers relevant learning from AARs conducted by past Task Forces to inform its work from the outset and must complete an AAR at the close of a Task Force, with support from the TFRU. The AAR process should begin before the termination of a Task Force and staff transition. A Task Force must submit to ES a comprehensive record, including an AAR, no later than 30 days after the conclusion of the Task Force, which will become part of the Agency's official records. The Executive Director should consider including external stakeholders in the learning and AAR processes. USAID's AAR technical guidance on, and help for, AARs is available here: http://pdf.usaid.gov/pdf_docs/PNADF360.pdf.

112.3.4.8 Monitoring and Evaluation

Effective Date: 02/10/2020

USAID is committed to rigorous and high-quality evaluation of programs to improve their effectiveness and inform decisions about current and future programming. Operating Units and implementing partners will continue to be responsible for the monitoring and evaluation (M&E) of their programs, according to the requirements of [ADS Chapter 201, Program Cycle Operational Policy](#). However, a Task Force should consider allocating resources for conducting overarching M&E of its activities to determine whether USAID is meeting its objectives.

112.3.5 Deactivation and Transition

Effective Date: 07/24/2020

A Task Force should only exist while a crisis situation warrants it. Because Task Forces are intended to be relatively short-term units, the need for an integrated, cross-Agency crisis-response platform will generally end before USAID has implemented, closed out, and audited all crisis-related activities. Therefore, affected B/IOs will likely have continuing responsibilities related to response to the crisis, even after deactivation or

transition of a Task Force.

In the event the crisis situation has ended, the Task Force is no longer needed, and the Administrator will deactivate it. More often, however, the need for some of the functions associated with a Task Force will endure beyond the existence of the Task Force itself, which will necessitate transition in addition to deactivation. In such cases, the most likely transition option is for one or more existing B/IOs to absorb the Task Force's functions, depending on the specific function in question. (If the functions a B/IO is absorbing are not reflected in its current Functional Statement in [ADS Chapter 101, Agency Programs and Functions](#), the B/IO should coordinate with HCTM and follow [ADS Chapter 101](#) guidelines to update the language.) This transition approach is viable when the complexity of the crisis response has diminished, or an existing B/IO's capacity to manage the crisis has increased, or both have occurred. Another transition option occurs only in rare instances: USAID may establish a new B/IO with a mandate that includes the crisis that was the subject of the Task Force (e.g., the Office of Afghanistan and Pakistan Affairs). In such cases, [ADS Chapter 102, Agency Organization](#) will continue to guide the organizational-change process.

The TFRU, together with a Task Force's Executive Director, **conducts** quarterly reviews of a Task Force's utility, in consultation with the affected B/IOs and informed by monitoring efforts related to the performance of the Task Force. The Executive Director will be responsible for sending a quarterly Action Memorandum to the Administrator, through ES, to cover the relevance of the Task Force; establish new or updated milestones to determine the deactivation or transition of the Task Force; and a recommendation on continuation, deactivation, or transition.

Within six months of the activation of a Task Force, the Executive Director and the TFRU must develop a stand-down plan and identify a target deactivation date based on input from team members and key stakeholders. If there is no overriding reason to extend the Task Force, the presumption should be to deactivate the Task Force within one year, or by the targeted stand-down date, whichever comes first.

When responsibilities of a Task Force transition to existing B/IO(s), each B/IO that will absorb the Task Force's responsibilities must begin preparing to accept them as soon as possible. The Task Force will work closely with the receiving B/IOs to assist with a smooth transition, including the completion of any outstanding tasks.

The following are illustrative factors for consideration on deactivation:

- In the event the Administrator activated the Task Force as part of a USG interagency directive, is there an established expiration date or set of interagency criteria for deactivating the Task Force?
- Has the focus of both interagency and intra-agency work shifted away from regional issues and approaches to bilateral, country-level efforts?
- Do the B/IOs most affected by the crisis now have the resources, staff, and funding

in place to take full ownership of the Task Force's responsibilities?

At the close of every Task Force, the Task Force must complete a number of required tasks before its deactivation and transition. These tasks include, but are not limited to, the following:

- a. Programmatic - The Executive Director, or his/her delegate, must ensure the Task Force transitions successfully to designated B/IOs any relevant continuing responsibilities related to strategic oversight and coordination of program-related decisions and actions.
- b. Financial Management - The Task Force must ensure a clear handoff of its fiduciary responsibilities, if any, to the appropriate B/IOs.
- c. A&A - The Task Force will assist COs/AOs and CORs/AORs, as needed, to assign to the appropriate B/IO cognizance for implementing mechanisms related to crisis response. To smooth the transition, the Task Force will update stakeholder B/IOs on current and planned awards prior to deactivation.
- d. Budget and Planning - The Executive Director, or his/her delegate, must ensure the successful transition to designated B/IOs of budget planning responsibility encumbered by the Task Force. A Task Force must ensure there is sufficient documentation and communication of key decisions to participating Bureaus, BRM, and/or M Bureau to provide a sound audit trail.
- e. Communications and Reporting - The Task Force will pass to LPA and designated B/IOs all distribution lists and information products. As part of a Task Force's transition, the Task Force, LPA, and the relevant B/IOs will determine what reporting and information needs the Agency should maintain, eliminate, or adjust going forward.
- f. Policy and Strategy Coordination - The Executive Director, or his/her delegate, must ensure the successful transition to designated B/IOs of any relevant continuing responsibilities related to strategic oversight and the coordination of policy and strategy decisions.
- g. Knowledge-Management - The TFRU has overall responsibility for the management of records when a Task Force deactivates. However, when a Task Force transitions responsibilities to a B/IO, the Executive Director, in coordination with the TFRU, must pass a complete set of official records to the Records Liaison Officer in the receiving B/IO, and to ES. The B/IO Records Liaison Officer will use appropriate hard copy and electronic means to file these records and provide records-management training regarding these files to relevant B/IO staff.
- h. M&E - The Executive Director, or his/her delegate, and the TFRU will use M&E documentation directly related to the work and performance of the Task Force to inform an AAR and future efforts by the TFRU to improve the operation of future

Task Forces. The relevant Operating Units and implementing partners, as guided by [ADS Chapter 201, Program Cycle Operational Policy](#), will maintain responsibility for any ongoing project- or activity-related M&E.

At the close of a Task Force, the Executive Director, with the support of the TFRU, must conduct an AAR and submit the AAR to ES within 30 days of deactivation. The AAR provides a forum for Task Force members to review and critique activities related to activation, deployment, integration, transition, and deactivation. Through the AAR, members of the Task Force can voice opinions and discuss strengths, lessons-learned, and areas for improvement. The TFRU should use the AAR to inform improvements to this ADS chapter, Help Documents, and future deployments of Task Forces.

ES will issue an Executive Notice on behalf of the Administrator regarding the deactivation of a Task Force, transition plans, and relevant contact information.

112.4 MANDATORY REFERENCES

112.4.1 External Mandatory References

Effective Date: 02/10/2020

- a. [2 FAM 060: International Disaster and Humanitarian Assistance](#)

112.4.2 Internal Mandatory References

Effective Date: 02/10/2020

- a. [ADS 102, Agency Organization](#)
- b. [ADS 201, Program Cycle Operational Policy](#)
- c. [ADS 251, International Disaster Assistance](#)
- d. [ADS 306, Interagency Agreements](#)
- e. [ADS 502, The USAID Records Management Program](#)

112.5 ADDITIONAL HELP

Effective Date: 02/10/2020

There are no additional help documents for this chapter.

112.6 DEFINITIONS

Effective Date: 02/10/2020

See the [ADS Glossary](#) for all ADS terms and definitions.

After-Action Review

A leadership and knowledge-sharing tool that helps USAID learn from experience and better understand important events, activities, or programs. An AAR is a professional

discussion of an event and focuses on performance standards that enable development professionals to discover what happened, why, and how, to sustain strengths and improve weaknesses. An AAR can be formal or informal, although those conducted for a Task Force should always be formal. **(Chapter 112)**

Task Force

An integrated platform to facilitate a coordinated Agency response to a crisis or emerging crisis, led by an Executive Director designated by the Administrator. It is a limited-term unit for developing crisis-response strategies that proposes action, and delegates and coordinates the Agency's response. USAID uses Task Forces to improve intra-Agency, interagency, and stakeholder collaboration to achieve the goals of a response to a crisis. **(Chapter 112)**

Task-Force Readiness Unit

The entity in the Bureau for Management that is responsible for coordinating the establishment of a Task Force and, as applicable, interagency logistics, staffing, and communications when the Administrator activates a Task Force; working with applicable B/IOs to activate/deactivate a Task Force; and working with the Executive Director of the Task Force and other members to formulate its objectives and processes. **(Chapter 112)**

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