



**SOLICITATION NUMBER:** 72C0T122R00043

**ISSUANCE DATE:** August 1, 2022

**CLOSING DATE AND TIME:** August 31, 2022, 1:00 PM Eastern Standard Time

**SUBJECT:** Solicitation for U.S. Personal Service Contractor (USPSC)

Dear Prospective Offerors:

The United States Government (USG), represented by the U.S. Agency for International Development (USAID), is seeking offers from qualified U.S. citizens to provide personal services as Financial Management Assistant/Specialist - Washington, DC (GS-9/11/12)(Tandem, Ladder)(Multiple) under a personal services contract, as described in the attached solicitation.

Submittals must be in accordance with the attached information at the place and time specified. Offerors interested in applying for this position **MUST** submit the following materials:

1. Complete resume. In order to fully evaluate your offer, your resume must include:
  - (a) Paid and non-paid experience, job title, location(s), dates held (month/year), and hours worked per week for each position. Dates (month/year) and locations for all overseas field experience must also be detailed. **Any experience that does not include dates (month/year), locations, and hours per week will not be counted towards meeting the solicitation requirements.**
  - (b) Specific duties performed that fully detail the level and complexity of the work.
  - (c) Names and contact information (phone and email) of your current and/or previous supervisor(s).
  - (d) Education and any other qualifications including job-related training courses, job-related skills, or job-related honors, awards or accomplishments.
  - (e) U.S. Citizenship.

**Note:** Your resume should contain explicit information to make a valid determination that you fully meet the experience requirements as stated in this solicitation for each grade level(s) for which you are applying. Offerors must specify in their offer materials whether they would like to be considered for the GS-9, GS-11, or GS-12. Offerors who would like to be considered for the GS-9, GS-11, and/or GS-12 positions should submit separate offers specifying which grade level in the submission. Offerors will only be considered for the grade level specified in the

submission. The offer will be considered for the lower grade level if the offeror does not specify the grade level in the submission. Offerors who are unsure of which grade level they meet the minimum qualifications for should submit separate offers for the GS-9, GS-11, and/or GS-12 positions. This information should be clearly identified in your resume. Failure to provide explicit information to determine your qualifications for the position will result in loss of full consideration.

- 2. USPSC Offeror Information for Personal Services Contracts form AID 309-2.** Offerors are required to complete and sign the form. **Due to COVID-19 and limited access to equipment, we are currently accepting electronic and typed signatures on the AID 309-2 form.**

NOTE ABOUT THE DATA UNIVERSAL NUMBERING SYSTEM AND SYSTEM FOR AWARD MANAGEMENT REQUIREMENTS All USPSCs with a place of performance in the United States are required to be registered in the System for Award Management (SAM) database prior to receiving an offer. You will be disqualified if you either fail to comply with this requirement or if your name appears on the excluded parties list. The selectee will be provided with guidance regarding this registration.

**Additional documents submitted will not be accepted.** Incomplete or late offers will not be considered. Your complete resume and the AID 309-2 form must be mailed or emailed to OTIjobs@usaid.gov

Offerors can expect to receive a confirmation email when offer materials have been received. Offerors should retain for their records copies of all enclosures which accompany their offers. This solicitation in no way obligates USAID to award a PSC contract, nor does it commit USAID to pay any cost incurred in the preparation and submission of the offer.

Offeror resources are available at [www.otijobs.net/guidance-for-applying](http://www.otijobs.net/guidance-for-applying). Any questions on this solicitation may be directed to:

OTI Recruitment Team  
E-Mail Address: OTIjobs@usaid.gov  
Website: www.OTIjobs.net

Sincerely,

Jaelyn Humphrey  
Acting Supervisory Contracting Officer  
M/OAA/CPS

**ATTACHMENT I****I. GENERAL INFORMATION****1. SOLICITATION NO.:** 72C0T122R00043**2. ISSUANCE DATE:** August 1, 2022**3. CLOSING DATE AND TIME FOR RECEIPT OF OFFERS:** August 31, 2022, 1:00 pm Eastern Time**4. POINT OF CONTACT:** OTI Recruitment Team, Email at [OTIjobs@usaid.gov](mailto:OTIjobs@usaid.gov).**5. POSITION TITLE:** Financial Management Assistant/Specialist

**6. MARKET VALUE:** This position has been designated as a “tandem-ladder” position that, depending on the qualifications of the offeror, can be filled at either the GS-9 (\$61,947 - \$80,532 per annum), the GS-11 (\$74,950 - \$97,430 per annum), or the GS-12 (\$89,834 - \$116,788 per annum) equivalent level, DC-locality pay. Final compensation will be negotiated within the GS-9/11/12 levels based upon the selectee’s history, qualifications, previous relevant experience and work history, and educational background as reported on AID-309-2. For selectees whose salary has been established on a Federal pay scale (i.e. General Schedule) or its equivalent, the base salary (not including locality pay) of their grade/step will be the basis of the salary negotiation. Salaries over and above the pay range will not be entertained or negotiated. Offerors who live outside the Washington, D.C. area will be considered for employment but no relocation expenses will be reimbursed.

Following at least one year at the GS-9 grade, the offeror may have the opportunity for advancement to the GS-11 equivalent grade. Following one year at the GS-11 grade, the offeror may have the opportunity for advancement to the GS-12 equivalent grade. In order to be advanced to the higher grade, the incumbent must meet the minimum qualifications of the higher grade and receive an excellent performance rating in their most recent annual performance evaluation. The evaluation must include a statement by the supervisor that the incumbent is performing successfully at the current grade and is considered ready to perform at the higher grade level. Neither advancement nor extension of the contract is guaranteed.

**Note:** Offerors who submit an offer for the GS-12 grade level, but do not meet the minimum qualifications as outlined in this solicitation and as reviewed by the Technical Evaluation Committee, will not be considered for the GS-9 or GS-11 positions if they have not submitted a separate offer for the GS-9 or GS-11 positions. Similarly, offerors who apply for the GS-9 position even though they might meet the minimum qualifications for the GS-11 or GS-12 position will not be considered for the higher graded position if they have not submitted a separate offer for the GS-11 or GS-12 positions. Offerors who are unsure of which grade level they meet the minimum qualifications for should submit separate offers for the GS-9, GS-11, and/or the GS-12 positions.

**7. PERIOD OF PERFORMANCE:** One (1) year, with four (4) one-year option periods.

**START DATE:** Within 45 days of receiving notification that required security clearance has been obtained.

**8. PLACE OF PERFORMANCE:** Washington, D.C.

**9. ELIGIBLE OFFERORS:** United States Citizens

**10. SECURITY LEVEL REQUIRED:** SECRET

## **11. STATEMENT OF DUTIES**

### **POSITION DESCRIPTION**

#### **BACKGROUND**

USAID's Office of Transition Initiatives (OTI) is seeking highly motivated, highly qualified individuals who want the opportunity to help support rapid international transition programs for priority conflict-prone countries. Created in 1994 as a distinct operating unit within USAID, OTI helps local partners advance peace and democracy in politically-transitioning countries. In support of U.S. foreign policy, OTI seizes emerging windows of opportunity in the political landscape to promote stability, peace, and democracy by catalyzing local initiatives through adaptive and agile programming.

Countries experiencing a significant political transition in the midst of a disaster or emerging from civil conflict have unique needs that cannot be fully addressed by traditional disaster relief. Timely and effective assistance to promote and consolidate peaceful, democratic advances can make the difference between a successful or a failed transition. OTI assists in securing peace by aiding indigenous, mostly non-governmental, civil society and media organizations. OTI uses such mechanisms as support for re-integration of ex-combatants into civilian society; development of initiatives to promote national reconciliation; identification of quick-impact community self-help projects to meet urgent economic needs; and aid to independent media outlets and community-based organizations to help promote informed debate and broaden public participation.

To respond quickly and effectively and meet its program objectives and mandate OTI retains a group of high level professionals and experts under U.S. Personal Services Contracts (USPSCs). These knowledgeable and skilled professionals make up the vast majority of the OTI work force and are at its forefront implementing and achieving the office's programmatic goals and objectives. There are several benefits that USPSCs may participate in, such as partial reimbursement for health and life insurance costs, as well as full coverage of workers' compensation, among other benefits. For more complete information on USPSC benefits, please see Section VI of this solicitation.

## **OTI's Core Values:**

### **Agility**

OTI addresses complex political problems through context analysis, experimentation, and strategic resource use. Applying an adaptive mindset in Washington and the field accelerates timely positive change.

### **Political**

OTI seeks to understand how power is created, traded, and facilitated, requiring that we acknowledge our privilege and the limits of our power. This understanding helps us act on power dynamics and harness them for transformation.

### **Accountability**

OTI exhibits a sense of ownership and integrity in the work we do, and holds a sense of responsibility to each other, the local partners we engage, the policies and programs we advance with our implementing partners, and the taxpayer.

### **Curiosity**

OTI's mission demands learning and adaptation. Our relentless curiosity drives us to wonder about people, problems, and possibilities. We question the status quo, seek to understand amid uncertainty, and treat mistakes as a compass pointing us toward more effective approaches.

### **Diversity & Inclusion**

OTI's ability to achieve its mission and live out its values is propelled by our collective responsibility to create a sense of belonging for all in our work environment. OTI values the diversity of each others' authentic selves, building a foundation of trust and respect.

### **Courage**

OTI embraces our engagements with one another, our stakeholders, and our programs with intentionality and optimism. Achieving our mission requires that we take risks and tackle difficult conversations and decisions. A courageous OTI is a force for positive change.

**OTI's DEIA Vision Statement:** OTI is a collaborative environment that represents the global community at all levels of our organization. Uniting diverse backgrounds and experiences, we value individual expertise to advance peace and democracy around the world.

Values and associated behaviors that will enable this vision are:

### **Trust**

- Model open communication, active listening and candor.

- Believe others when they share their experiences.

### **Respect**

- A respectful attitude should be shown to everyone.
- Allow for others to express complete opinion/thoughts without interruption, while recognizing that there are other perspectives and lived experiences.

### **Belonging (Accessibility)**

- Serve as an ally to those who feel excluded (professionally, socially, personally, etc.).
- Promote togetherness and acceptance through equitable behavior.

### **Empathy**

- Listen to understand, create space to be real/feel.
- Remind yourself to be conscious of how others may feel or receive your words

### **Self-awareness/accountability**

- Supervisors hold their peers to account on their expectations and behaviors.
- Seek regular, constructive feedback to understand how your words and actions affect and influence others, and how they are being perceived and interpreted.
- Acknowledge unconscious bias and be willing to learn and change behavior when confronted/corrected.

For more information about OTI and its country programs please see:

<https://www.usaid.gov/stabilization-and-transitions>

## **INTRODUCTION**

The Financial Management Assistant/Specialist reports directly to the OTI Finance Team Leader. The incumbent of the position is OTI's financial expert and must possess knowledge of financial systems, especially those employed by USAID, to support OTI's transition programs. As the OTI financial expert, the Financial Management Assistant/Specialist is the office's financial analyst and budget professional, and must have the presence and ability to identify and articulate financial issues that impact OTI programs to counterparts. The Financial Management Specialist will efficiently manage all OTI financial resources, ensuring that program funding for OTI activities is readily available. Approximately 95% or more of OTI's resources are program funds, and 5% or less are operational expenses. The Financial Management Assistant/Specialist must be able to quickly master OTI and USAID budget and finance systems, and be able to guide program and operations staff, including senior management, in their use when required. The Financial Management Specialist must be readily available to advise and train OTI/Washington, field staff, and implementing partner staff on financial issues.

OTI is a fast-paced office with frequently changing priorities, and staff must be able to multitask and move quickly from one activity to another. Effective organizational skills, attention to detail, and understanding of financial management systems and processes are required. Ledgers, records and relevant financial documentation must be current and accurate. This is a key position in a very demanding office that responds rapidly to numerous complex activities and provides OTI staff with financial services and support, including training. The demands of this position require a Financial Management Specialist with superb customer service and work ethic, and with the ability to operate independently and anticipate the needs of a complex organizational unit.

## **CORE FUNCTIONAL AREAS OF RESPONSIBILITY**

### **DUTIES AND RESPONSIBILITIES**

The work of the Financial Management Specialist requires teamwork, the exercise of discretion, judgment, and personal responsibility. As a member of an operational office, you are willing and able to perform a wide range of administrative functions to help ensure programmatic success. You have a high level of integrity and attention to detail to ensure the use of OTI systems and procedures to maintain effective and efficient management of funds, programming, and monitoring and evaluation. You are flexible and willing to work under conditions of ongoing change, and remain professional and respectful of colleagues and authority in a diverse workforce. You place a premium on the building of positive relationships with their respective team both in the field and in Washington, and with key stakeholders both in and outside of USAID. You are able to prioritize and complete tasks without follow-up by the supervisor, while also filling in gaps as needed to ensure the responsiveness of the team. You are a strategic thinker, articulate innovative ideas, present solutions, and are a positive role model for colleagues both in and outside of OTI. You are also committed to upholding USAID/OTI's Diversity, Equity, Inclusion, and Accessibility's (DEIA) Vision and Values as outlined in the background.

Under the direct supervision of the OTI Finance Team Leader or designee, you will perform the following duties:

#### ***At the GS-9 "Financial Management Assistant" Level:***

- Support program budgets and assist with financial planning, management and reconciliation;
- Provide general administrative support such as scheduling and facilitating meetings, drafting meeting minutes, drafting and tracking memos, ensuring that action items are followed up, filing, correspondence control, and other administrative services;
- Maintain the CPS/OTI official accounts for OTI program funds, including commitments and obligations for the current year and carryover funds. Monitor prior year obligation balances. Perform regular account reconciliation and determine necessary adjustments to balance accounts accordingly;

- Provide support to the development and maintenance of CPS/OTI's budget and finance database;
- Maintain continuous liaison and effective working relationships with all OTI teams, particularly OTI's Program Office, Workforce Planning, and Contracts Teams;
- Maintain continuous liaison and effective working relationships with Agency counterparts such as the Conflict Prevention and Stabilization (CPS) Bureau Controller, Policy and Program Coordination, Office of Acquisition and Assistance, Office of Financial Management, and USAID Missions overseas on matters relating to procurement, financial issues, obligations and de-obligations of program-funded activities. [Note: 95% or more of OTI funding is from program funding sources, and 5% or less of OTI funding is from operational expense funding];
- Maintain accurate records of all CPS/OTI budget and finance activities supporting transition programs;
- Prepare Acquisition and Assistance Requests and support documentation for the management and administration of procurement in support of OTI country program activities. Process USPSC contract actions in the agency's Global Acquisition and Assistance System (GLAAS), monitor funding levels, and review contract budgets and modifications;
- After an initial learning period, provide orientation, training, and mentoring for new staff that have since on-boarded as delegated; communicate with supervisor to recognize good performance and communicate where performance needs to be improved; and,
- Serve on temporary details within OTI, other USAID bureaus/offices, or other USG agencies under this scope of work for a period not to exceed six (6) months. Duties performed while on detail must be directly related to the scope of work. Contracting Officer (CO) approval is required for the temporary detail. Any extension past the six (6) months requires CO approval.

***At the GS-11 "Financial Management Specialist" Level:***

- Prepare accurate financial and budget reports. Conduct regular and special financial analyses that cover reimbursements and special appropriations;
- Prepare and monitor financial reports for program-funded activities. Monitor OTI's resource availability, prepare reports on disbursements and use of funds and manage the obligation/de-obligation process to maximize use of available funds;
- Manage program funds for the Office. Control the allocation of approximately \$90 million of OTI funds as well as additional program funds from other sources per year (ranging



from \$15 million to \$200 million or more). Coordinate and work closely with the CPS Bureau controller's office, as well as with other Bureaus when additional funds are received or transferred to OTI for OTI managed programs;

- Conducts the day-to-day operation and maintenance of OTI program financial accounts. These statements are required under legislation to assure compliance with laws and regulations affecting the expenditure of funds, control of the budget, and reports on the status of obligations and expenditures;
- Review financial proposals to adhere to financial procedures, conformance to agency requirements and/or limitations to generally accepted accounting principles and standards. Assure approved documents are within established guidelines and are readily retrievable from country or project files;
- Utilize funding analysis to recommend program budget and staffing levels based on management decisions and/or changes in the program goals, objectives, and priorities and as back-up material for requests for budget increases/decreases;
- Prepare funding requirements for inclusion in a variety of budgetary and programmatic submissions, e.g., Annual Budget Submission, Congressional Budget Justification, Quarterly Accrual Reports, Monthly reports to OMB, Annual Report, etc.;
- Advise country team program managers on the preparation of budget requests; consolidate supporting budget data and justifications;
- Maintain continuous liaison and effective working relationships with all OTI teams, particularly OTI's Program Office, Workforce Planning, and Contracts Teams;
- Perform Section 1311 Review of Unliquidated Obligations for all years, e.g., contracts, grants, cooperative agreements, inter-agency agreements, International Cooperative Administrative Support Services (ICASS), CNs and MOUs. Ensure that required documentation supports the analysis and determination. Work with FM and CPS/PPM to help ensure that program funds deobligated are immediately reprogrammed and available for other program priorities;
- Prepare Acquisition and Assistance Requests and support documentation for the management and administration of procurement in support of OTI country program activities. Process USFSC contract actions in the agency's Global Acquisition and Assistance System (GLAAS), monitor funding levels, and review contract budgets and modifications;
- Provide orientation, training, and mentoring for new staff that have since on-boarded as delegated; communicate with supervisor to recognize good performance and communicate where performance needs to be improved; and,

- Serve on temporary details within OTI, other USAID bureaus/offices, or other USG agencies under this scope of work for a period not to exceed six (6) months. Duties performed while on detail must be directly related to the scope of work. Contracting Officer (CO) approval is required for the temporary detail. Any extension past the six (6) months requires CO approval.

***At the GS-12 “Financial Management Specialist” Level:***

- Prepare accurate financial and budget reports. Conduct regular and special financial analyses that cover reimbursements and special appropriations;
- Prepare and monitor financial reports for program-funded activities. Monitor OTI's resource availability, prepare reports on disbursements and use of funds and manage the obligation/de-obligation process to maximize use of available funds;
- Manage program funds for the Office. Control the allocation of approximately \$50 million of OTI funds as well as additional program funds from other sources per year (ranging from \$15 million to \$200 million or more). Coordinate and work closely with the CPS Bureau controller's office, as well as with other Bureaus when additional funds are received or transferred to OTI for OTI managed programs;
- Conducts the day-to-day operation and maintenance of OTI program financial accounts. These statements are required under legislation to assure compliance with laws and regulations affecting the expenditure of funds, control of the budget, and reports on the status of obligations and expenditures;
- Review financial proposals to adhere to financial procedures, conformance to agency requirements and/or limitations to generally accepted accounting principles and standards. Assure approved documents are within established guidelines and are readily retrievable from country or project files;
- Utilize funding analysis to recommend program budget and staffing levels based on management decisions and/or changes in the program goals, objectives, and priorities and as back-up material for requests for budget increases/decreases;
- Prepare funding requirements for inclusion in a variety of budgetary and programmatic submissions, e.g., Annual Budget Submission, Congressional Budget Justification, Quarterly Accrual Reports, Monthly reports to OMB, Annual Report, etc.;
- Advise country team program managers on the preparation of budget requests; consolidate supporting budget data and justifications;

- Maintain continuous liaison and effective working relationships with all OTI teams, particularly OTI's Program Office, Workforce Planning, and Contracts Teams;
- Perform Section 1311 Review of Unliquidated Obligations for all years, e.g., contracts, grants, cooperative agreements, inter-agency agreements, International Cooperative Administrative Support Services (ICASS), CNs and MOUs. Work with FM and CPS/PPM to help ensure that program funds deobligated are immediately reprogrammed and available for other program priorities;
- Act as the OTI expert on OTI and USAID financial operating systems in support of OTI program funding. Provide reports, advice, guidance, instructions and training to OTI staff, including funded procurement actions;
- Serve as Acting Team Leader for the OTI Finance Team in their absence;
- Prepare Acquisition and Assistance Requests and support documentation for the Prepare Acquisition and Assistance Requests and support documentation for the management and administration of procurement in support of OTI country program activities. Process USPSC contract actions in the agency's Global Acquisition and Assistance System (GLAAS), monitor funding levels, and review contract budgets and modifications;
- Provide orientation, training, and mentoring for new staff that have since on-boarded as delegated; communicate with supervisor to recognize good performance and communicate where performance needs to be improved;
- Mentor and train at least one financial backstop ensuring that the backstop will be able to provide OTI with full finance services in the absence of any Finance Team Member; and,
- Serve on temporary details within OTI, other USAID bureaus/offices, or other USG agencies under this scope of work for a period not to exceed six (6) months. Duties performed while on detail must be directly related to the scope of work. Contracting Officer (CO) approval is required for the temporary detail. Any extension past the six (6) months requires CO approval.

#### SUPERVISORY RELATIONSHIP:

The Financial Management Assistant/Specialist will be supervised by the OTI Finance Team Leader, as a member of the Program, Learning and Innovations Division (PLI).

#### SUPERVISORY CONTROLS:

At the GS-9 level, the supervisor typically assigns projects and sets deadlines for completing the work. Findings and recommendations developed by the USPSC are reviewed for appropriateness prior to release or discussion with management officials.

At the GS-11 level, the supervisor sets overall objectives and resources available, and works with the incumbent to develop deadlines, work to be done and methodology. The incumbent is responsible for carrying out assignments, consulting with the supervisor on policy interpretations, and work is evaluated for technical soundness and effectiveness in meeting work objectives.

At the GS-12 level, the supervisor sets overall objectives and resources available and works with the incumbent to develop deadlines and work to be done. The incumbent is responsible for planning and carrying out assignments, coordinating with others and interpreting policy in terms of established objectives. The incumbent may also determine the approach to be taken and the methodology to be used, keeping the supervisor informed of progress.

## **12. PHYSICAL DEMANDS**

The work is generally sedentary and does not pose undue physical demands.

## **13. WORK ENVIRONMENT:**

Work is performed in an office setting. Overseas deployments are not required for this position.

## **II. MINIMUM QUALIFICATIONS REQUIRED FOR THIS POSITION**

(Determines basic eligibility for the position. Offerors who do not meet all of the education and experience factors are considered NOT qualified for the position. See detailed instructions for demonstrating Education/Experience under “Submitting an Offer”)

### ***At the GS-9 level:***

(1) A Master’s Degree with **two (2) years** of work experience;

**OR**

A Bachelor’s Degree with **three (3) years** of work experience;

**OR**

An Associate’s Degree with **four (4) years** of work experience;

**OR**

A High School Diploma/Equivalent with **five (5) years** of work experience;

**AND**

(2) Demonstrated experience developing and maintaining financial management and/or information systems;

- (3) Demonstrated experience with U.S. Government rules and regulations pertaining to budget and/or financial resources.

***At the GS-11 level:***

- (1) A Master's Degree with **three (3) years** of work experience;

**OR**

A Bachelor's Degree with **four (4) years** of work experience;

**OR**

An Associate's Degree with **five (5) years** of work experience;

**OR**

A High School Diploma/Equivalent with **six (6) years** of work experience;

**AND**

- (2) **One (1) year** of experience developing and maintaining financial management and/or information systems;
- (3) Demonstrated experience with rules and regulations pertaining to budget and/or financial resources.

***At the GS-12 level:***

- (1) A Master's Degree with **four (4) years** of work experience;

**OR**

A Bachelor's Degree with **five (5) years** of work experience;

**OR**

An Associate's Degree with **six (6) years** of work experience;

**OR**

A High School Diploma/Equivalent with **five (7) years** of work experience;

**AND**

- (2) **Two (2) years** of experience developing and maintaining financial management and/or information systems;
- (3) Demonstrated experience with rules and regulations pertaining to budget and/or financial resources.

### **III. EVALUATION AND SELECTION FACTORS**

(Determines basic eligibility for the position. Offerors who do not meet all of the education and experience factors are considered NOT qualified for the position.)

The Government may award a contract without discussions with offerors in accordance with FAR 52.215-1. The CO reserves the right at any point in the evaluation process to establish a competitive range of offerors with whom negotiations will be conducted pursuant to FAR 15.306(c). In accordance with FAR 52.215-1, if the CO determines that the number of offers that would otherwise be in the competitive range exceeds the number at which an efficient competition can be conducted, the CO may limit the number of offerors in the competitive range to the greatest number that will permit an efficient competition among the most highly rated offers. FAR provisions of this solicitation are available at <https://www.acquisition.gov/browse/index/far>.

#### **SELECTION FACTORS:**

(Determines basic eligibility for the position. Offerors who do not meet all of the selection factors are considered NOT qualified for the position.)

- Offeror is a U.S. Citizen;
- Complete resume submitted. See cover page for resume requirements. Experience that cannot be quantified will not be counted towards meeting the solicitation requirements;
- Ability to obtain a SECRET level security clearance (**NOTE: Dual citizens may be asked to renounce second-country citizenship**);
- Satisfactory verification of academic credentials.

A USAID Secret level security clearance is required prior to issuance of the contract for this position.

**NOTE:** If a full security investigation package is not submitted by the selected within 30 days after it is requested, the offer may be rescinded. If a security clearance is not able to be obtained within four months after the selected submits the initial security clearance documentation, the offer may be rescinded.

#### **OFFEROR RATING SYSTEM**

The offeror rating system factors are used to determine the competitive ranking of qualified offerors in comparison to the technical evaluation criteria. Offerors must demonstrate the rating factors outlined below within their resume, as they are evaluated strictly by the information provided.

**Note:** Supplemental documentation with written responses is not required and will not be reviewed for this solicitation.

**Note:** Offerors are required to address each factor of the Offeror Rating System in their resume, describing specifically and accurately what experience, training, education, and/or awards they have received as it pertains to each factor. Failure to address the selection factors and/or Offeror Rating System evaluation factors may result in not receiving credit for all pertinent experience, education, training and/or awards.

The evaluation factors are as follows:

**Financial (30 Points)**

- Demonstrated experience supporting budgets and ability to maintain a financial database.
- Demonstrated experience with financial planning, management, and reconciliation.
- Demonstrated experience gathering, analyzing, and evaluating budgets.

**Organization (25 Points)**

- Demonstrated experience collaborating within and across teams.
- Demonstrated experience with attention to detail, time management, and organizational skills.

**Administrative (15 Points)**

- Demonstrated experience providing administrative support such as scheduling and facilitating meetings, drafting meeting minutes, and/or drafting and tracking memos.

**BASIS OF RATING:** Offerors who clearly meet the Education/Experience Requirements and Selection Factors will be further evaluated in accordance with the Offeror Rating System. Those offerors determined to be competitively ranked may also be evaluated on interview performance and satisfactory professional reference checks. In the event that an offeror has fully demonstrated their qualifications and there are no other competitive offerors, OTI reserves the right to forgo the interview process.

The Offeror Rating System is as follows:

Evaluation Factors – 70 Points

Interview Performance - 30 Points

Satisfactory Professional Reference Checks - Pass/Fail (no points assigned)

**Total Possible Points: 100**

The most qualified offerors may be interviewed, required to provide a writing sample, and demonstrate an ability to operate commonly used office applications. OTI will not pay for any expenses associated with the interviews. In addition, offers (written materials and interviews) will be evaluated based on content as well as on the offerors writing, presentation, and communication skills. In the event that an offeror has fully demonstrated their qualifications and there are no other competitive offerors, OTI reserves the right to forgo the interview process. Professional references and academic credentials will be evaluated for offerors being considered for selection. Offerors

must submit at least three (3) professional references, one (1) of which must be a current or former supervisor. OTI reserves the right to contact previous employers to verify employment history. If the offeror had a previous position with USAID, the TEC and/or CO are encouraged to obtain reference checks from the previous supervisor(s) or CO(s). See ADS 309.3.1.11.a.4

#### **IV. SUBMITTING AN OFFER**

Offers must be **received** by the closing date and time at the address specified in **Section I, item 3**, and submitted to the Point of Contact in **Section I, item 4**.

Qualified offerors are **required** to submit:

1. **Complete resume.** In order to fully evaluate your offer, your resume must include:
  - (a) Paid and non-paid experience, job title, location(s), dates held (month/year), and hours worked per week for each position. Dates (month/year) and locations for all overseas field experience must also be detailed. **Any experience that does not include dates (month/year), locations, and hours per week will not be counted towards meeting the solicitation requirements.**
  - (b) Specific duties performed that fully detail the level and complexity of the work.
  - (c) Names and contact information (phone and email) of your current and/or previous supervisor(s).
  - (d) Education and any other qualifications including job-related training courses, job-related skills, or job-related honors, awards or accomplishments.
  - (e) U.S. Citizenship.

Your resume should contain **explicit information to make a valid determination that you fully meet the minimum qualification requirements** as stated in this solicitation for each grade level(s) for which you are applying. If you do not specify which grade level(s), your offer will be considered at the lower grade level. This information should be clearly identified in your resume. Failure to provide explicit information to determine your qualifications for the position will result in loss of full consideration.

**NOTE:** The Offeror Rating System Evaluation Factors are worth 70 out of 100 points. Offerors are required to address each factor of the Offeror Rating System in their resume, describing specifically and accurately what experience, training, education, and/or awards they have received as it pertains to each factor. Failure to address the selection factors and/or Offeror Rating System factors may result in not receiving credit for all pertinent experience, education, training and/or awards.

2. **Offeror Information for Personal Services Contracts form AID 309-2.** Offerors are required to complete and sign the form. **Due to COVID-19 and limited access to equipment, we are currently accepting electronic and typed signatures on the AID 309-2 form.**



- 3. Ensuring Adequate COVID-19 Safety Protocols for Federal Contractors** - The Offeror will be required to show proof that the Offeror is fully vaccinated against COVID-19 on or before the first date of onboarding, or submit an approved reasonable accommodation to the CO. If the contractor does not meet this requirement the contract may be terminated.\*

*\*See Notice Regarding Any Court Order Affecting the Implementation of E.O. 14042 in Section VIII below.*

Additional documents submitted will not be accepted.

To ensure consideration of offers for the intended position, offers must prominently reference the solicitation number in the offer submission.

Offeror resources are available at [www.otijobs.net/guidance-for-applying](http://www.otijobs.net/guidance-for-applying).

## **DOCUMENT SUBMITTALS**

**Via email:** [OTIjobs@usaid.gov](mailto:OTIjobs@usaid.gov)

*Please note in your document submittal where you heard about this position.*

## **NOTE REGARDING GOVERNMENT OBLIGATIONS FOR THIS SOLICITATION**

This solicitation in no way obligates USAID to award a PSC contract, nor does it commit USAID to pay any cost incurred in the preparation and submission of the offer.

## **NOTE REGARDING THE SYSTEM FOR AWARD MANAGEMENT (SAM)**

All individuals contracted as USPSCs with a place of performance in the United States are required to be registered in the SAM database. The selected offeror will be provided with guidance regarding this registration.

For general information about SAM, please refer to Federal Acquisition Regulation (FAR) Clause 52.204-6, Unique Entity Identifier and FAR 52.204-7, System for Award Management. [https://www.acquisition.gov/far/part-52#FAR\\_52\\_204\\_7](https://www.acquisition.gov/far/part-52#FAR_52_204_7) or [www.sam.gov](http://www.sam.gov).

**ALL QUALIFIED OFFERORS WILL BE CONSIDERED REGARDLESS OF AGE, RACE, COLOR, SEX, CREED, NATIONAL ORIGIN, LAWFUL POLITICAL AFFILIATION, NON-DISQUALIFYING DISABILITY, MARITAL STATUS, SEXUAL ORIENTATION, AFFILIATION WITH AN EMPLOYEE ORGANIZATION, OR OTHER NON-MERIT FACTOR.**

## **V. LIST OF REQUIRED FORMS PRIOR TO AWARD**

Once the Contracting Officer (CO) informs the successful offeror about being selected for a contract award, the CO will provide the successful offeror instructions about how to complete and submit the following forms. Forms outlined below can found at <http://www.usaid.gov/forms/>

1. Declaration for Federal Employment (OF-306).
2. Questionnaire for Sensitive Positions (for National Security) (SF-86), or Questionnaire for Non-Sensitive Positions (SF-85).
3. Fingerprint Card (FD-258).

The contractor will be required to show proof that the contractor is fully vaccinated against COVID-19 on or before the first date of onboarding, or submit an approved reasonable accommodation to the CO. If the contractor does not meet this requirement the contract may be terminated.

## **VI. BENEFITS AND ALLOWANCES**

As a matter of policy, and as appropriate, a USPSC is normally authorized the following benefits and allowances:

### 1. BENEFITS:

- a) Employer's FICA Contribution
- b) Contribution toward Health & Life Insurance
- c) Pay Comparability Adjustment
- d) Annual Increase (pending a satisfactory performance evaluation)
- e) Eligibility for Worker's Compensation
- f) Annual and Sick Leave
- g) Paid Parental Leave

### 2. ALLOWANCES:

Section numbers refer to rules from the Department of State Standardized Regulations (Government Civilians Foreign Areas), available at [https://aoprals.state.gov/content.asp?content\\_id=282&menu\\_id=101](https://aoprals.state.gov/content.asp?content_id=282&menu_id=101)

- |                                    |  |
|------------------------------------|--|
| (a) Post Differential              | Chapter 500 and Tables in Chapter 900. |
| (b) Living Quarters Allowance      | Section 130.                           |
| (c) Temporary Lodging Allowance    | Section 120.                           |
| (d) Post Allowance                 | Section 220.                           |
| (e) Supplemental Post Allowance    | Section 230.                           |
| (f) Payments During Evacuation     | Section 600.                           |
| (g) Education Allowance            | Section 270.                           |
| (h) Separate Maintenance Allowance | Section 260.                           |
| (i) Danger Pay Allowance           | Section 650.                           |
| (j) Education Travel               | Section 280.                           |

**VII. TAXES**

USPSCs are required to pay Federal income taxes, FICA, Medicare and applicable State income taxes.

**VIII. USAID REGULATIONS, POLICIES AND CONTRACT CLAUSES PERTAINING TO PSCs**

USAID regulations and policies governing USPSC awards are available at these sources:

**1. USAID Acquisition Regulation (AIDAR), Appendix D**, “Direct USAID Contracts with a U.S. Citizen or a U.S. Resident Alien for Personal Services Abroad,” including contract clause “General Provisions,” available at <https://www.acquisition.gov/aidar/aidar-appendix-d-direct-usaid-contracts-us-citizen-or-us-resident-alien-personal-services-abroad>.

**2. Contract Cover Page form AID 309-1** available at <https://www.usaid.gov/forms>.

**One Base Year Table – Financial Management Assistant/Specialist**

Item No (A)	Services (Description) (B)	Qty (C)	Unit (D)	Unit Price (E)	Amount (F)
0001	<b>Base Year 1 - Compensation</b> Award Type: Cost Product Service Code: R497 Accounting Info: <i>[insert from Phoenix]</i>	1	LOT	\$_____	\$_____
	<b>Fringe Benefits/Other Direct Costs (ODCs)</b> Award Type: Cost Product Service Code: R497 Accounting Info: <i>[insert from Phoenix]</i>				
Total Estimated Cost					\$_____

**Four Option Years Table- Financial Management Assistant/Specialist**

Item No	Services (Description)	Qty	Unit	Unit Price	Amount
(A)	(B)	(C)	(D)	(E)	(F)
1001	Option Period (OP) 1 - Compensation Award Type: Cost Product Service Code: R497 Accounting Info: <i>[insert from Phoenix]</i>	1	LOT	\$ ____	\$ ____
	OP 1 - ODCs Award Type: Cost Product Service Code: R497 Accounting Info: <i>[insert from Phoenix]</i>				
2001	OP 2 - Compensation Award Type: Cost Product Service Code: R497 Accounting Info: <i>[insert from Phoenix]</i>	1	LOT	\$ ____	\$ ____
	OP 2 - ODCs Award Type: Cost Product Service Code: R497 Accounting Info: <i>[insert from Phoenix]</i>				
3001	Option Period (OP) 3 - Compensation Award Type: Cost Product Service Code: R497 Accounting Info: <i>[insert from Phoenix]</i>	1	LOT	\$ ____	\$ ____
	OP 3 - ODCs Award Type: Cost Product Service Code: R497 Accounting Info: <i>[insert from Phoenix]</i>				
4001	Option Period (OP) 4 - Compensation Award Type: Cost Product Service Code: R497 Accounting Info: <i>[insert from Phoenix]</i>	1	LOT	\$ ____	\$ ____
	OP 4 - ODCs Award Type: Cost				

	Product Service Code: R497 Accounting Info: <i>[insert from Phoenix]</i>				
Total Estimated Cost <i>[base + options]</i>					\$ _____

3. Acquisition and Assistance Policy Directives/Contract Information Bulletins (AAPDs/CIBs) for Personal Services Contracts with Individuals available at <http://www.usaid.gov/work-usaid/aapds-cibs>.

**4. Ethical Conduct.** By the acceptance of a USAID personal services contract as an individual, the contractor will be acknowledging receipt of the “Standards of Ethical Conduct for Employees of the Executive Branch,” available from the U.S. Office of Government Ethics, in accordance with General Provision 2 and 5 CFR 2635. See <https://www.oge.gov/web/oge.nsf/OGE%20Regulations>

AAPDs and CIBs contain changes to USAID policy and General Provisions in USAID regulations and contracts. Please refer to <http://www.usaid.gov/work-usaid/aapds-cibs#psc> to determine which AAPDs and CIBs apply to this contract.

**5. PSC Ombudsman** The PSC Ombudsman serves as a resource for any Personal Services Contractor who has entered into a contract with the United States Agency for International Development and is available to provide clarity on their specific contract with the agency. Please visit our page for additional information: <https://www.usaid.gov/workusaid/personal-service-contracts-ombudsman7> The PSC Ombudsman may be contacted via: [PSCOmbudsman@usaid.gov](mailto:PSCOmbudsman@usaid.gov).

**AAPD 06-10 – PSC MEDICAL EXPENSE PAYMENT RESPONSIBILITY**

General Provision 28, MEDICAL EXPENSE PAYMENT RESPONSIBILITY (OCTOBER 2006)

(a) Definitions. Terms used in this General Provision are defined in 16 FAM 116 available at <http://www.state.gov/m/a/dir/regs/fam/16fam/index.htm>. Note: Personal services contractors are not eligible to participate in the Federal Employees Health Programs.

(b) MEDICAL EVACUATION (MEDEVAC) SERVICES – Please see Attachment 2 to this solicitation for information on AAPD No. 18-02.

(c) When the contractor or eligible family member is covered by health insurance, that insurance is the primary payer for medical services provided to that contractor or eligible family member(s) both in the United States and abroad. The primary insurer’s liability is determined by the terms, conditions, limitations, and exclusions of the insurance policy. When the contractor or eligible family member is not covered by health insurance, the contractor is the primary payer for the total

amount of medical costs incurred and the U.S. Government has no payment obligation (see paragraph (f) of this provision).

(d) USAID serves as a secondary payer for medical expenses of the contractor and eligible family members who are covered by health insurance, where the following conditions are met:

(1) The illness, injury, or medical condition giving rise to the expense is incurred, caused, or materially aggravated while the eligible individual is stationed or assigned abroad;

(2) The illness, injury, or medical condition giving rise to the expense required or requires hospitalization and the expense is directly related to the treatment of such illness, injury, or medical condition, including obstetrical care; and

(3) The Office of Medical Services (M/MED) or a Foreign Service medical provider (FSMP) determines that the treatment is appropriate for, and directly related to, the illness, injury, or medical condition.

(e) The Mission Director may, on the advice of M/MED or an FSMP at post, authorize medical travel for the contractor or an eligible family member in accordance with the General Provision 10, Travel and Transportation Expenses (July 1993), section (i) entitled “Emergency and Irregular Travel and Transportation.” In the event of a medical emergency, when time does not permit consultation, the Mission Director may issue a Travel Authorization Form or Medical Services Authorization Form DS-3067, provided that the FSMP or Post Medical Advisor (PMA) is notified as soon as possible following such an issuance. The contractor must promptly file a claim with his or her medevac insurance provider and repay to USAID any amount the medevac insurer pays for medical travel, up to the amount USAID paid under this section. The contractor must repay USAID for medical costs paid by the medevac insurer in accordance with sections (f) and (g) below. In order for medical travel to be an allowable cost under General Provision 10, the contractor must provide USAID written evidence that medevac insurance does not cover these medical travel costs.

(f) If the contractor or eligible family member is not covered by primary health insurance, the contractor is the primary payer for the total amount of medical costs incurred. In the event of a medical emergency, the Medical and Health Program may authorize issuance of Form DS-3067, Authorization for Medical Services for Employees and/or Dependents, to secure admission to a hospital located abroad for the uninsured contractor or eligible family member. In that case, the contractor will be required to reimburse USAID in full for funds advanced by USAID pursuant to the issuance of the authorization. The contractor may reimburse USAID directly or USAID may offset the cost from the contractor’s invoice payments under this contract, any other contract the individual has with the U.S. Government, or through any other available debt collection mechanism.

(g) When USAID pays medical expenses (e.g., pursuant to Form DS-3067, Authorization for Medical Services for Employees and/or Dependents), repayment must be made to USAID either by insurance payment or directly by the contractor, except for the amount of such expenses USAID is obligated to pay under this provision. The Contracting Officer will determine the repayment amount in accordance with the terms of this provision and the policies and procedures for employees contained in 16 FAM 521. When USAID pays the medical expenses, including medical travel costs (see section (e) above), of an individual (either the contractor or an eligible family member) who is

covered by insurance, that individual promptly must claim his or her benefits under any applicable insurance policy or policies. As soon as the individual receives the insurance payment, the contractor must reimburse USAID for the full amount that USAID paid on the individual's behalf or the repayment amount determined by the Contracting Officer in accordance with this paragraph, whichever is less. If an individual is not covered by insurance, the contractor must reimburse USAID for the entire amount of all medical expenses and any travel costs the contractor receives from his/her medevac provider.

(h) In the event that the contractor or eligible family member fails to recover insurance payments or transfer the amount of such payments to USAID within 90 days, USAID will take appropriate action to collect the payments due, unless such failure is for reasons beyond the control of the USPSC/dependent.

(i) Before departing post or terminating the contract, the contractor must settle all medical expenses and medical travel costs. If the contractor is insured, he or she must provide proof to the Contracting Officer that those insurance claims have been submitted to the insurance carrier(s) and sign a repayment agreement to repay to USAID any amounts paid by the insurance carrier(s).

## ATTACHMENT II

### Title 48 of the Code of Federal Regulations (CFR) Chapter 7. USAID Acquisition Regulation (AIDAR)

#### APPENDIX D – DIRECT USAID CONTRACTS WITH A U.S. CITIZEN OR A U.S. RESIDENT ALIEN FOR PERSONAL SERVICES ABROAD

##### GP 25. MEDICAL EVACUATION (MEDEVAC) SERVICES (DEC 2019)

A contractor who is required to relocate abroad and accompanying eligible family members; or a contractor on official travel status abroad on temporary duty or training, will be provided Medevac services through the Department of State, Bureau of Medical Services, similar to that provided to U.S. Government employees in 16 FAM 300 Medical Travel. Medevac costs that will be covered by USAID include travel and per diem, but do not include medical care costs.

To be eligible for Medevac services covered by the Department of State Medevac program, the contractor and accompanying eligible family members must obtain and maintain international health insurance coverage in accordance with the clause of the contract entitled, “Insurance.”

##### GP 29. INCENTIVE AWARDS (DEC 2019)

The contractor is eligible to receive certain monetary and non-monetary USAID incentive awards in accordance with the AIDAR and USAID internal policy.

## ATTACHMENT III

### PERSONAL SERVICES CONTRACTS WITH INDIVIDUALS

#### PART 52—SOLICITATION PROVISIONS AND CONTRACT CLAUSES

##### Subpart 52.2—Text of Provisions and Clauses

##### 52.223-99 Ensuring Adequate COVID-19 Safety Protocols for Federal Contractors, Alternate 70.

#### ENSURING ADEQUATE COVID-19 SAFETY PROTOCOLS FOR FEDERAL CONTRACTORS (OCT 2021)-Alternate 70 (OCT 2021) (M/OAA-DEV-FAR22-01c)

(a) *Definition.* As used in this clause -

*United States or its outlying areas means—*

- (1) The fifty States;
- (2) The District of Columbia;



- (3) The commonwealths of Puerto Rico and the Northern Mariana Islands;
- (4) The territories of American Samoa, Guam, and the United States Virgin Islands; and
- (5) The minor outlying islands of Baker Island, Howland Island, Jarvis Island, Johnston Atoll, Kingman Reef, Midway Islands, Navassa Island, Palmyra Atoll, and Wake Atoll.

**(b) Authority.** This clause implements Executive Order 14042, Ensuring Adequate COVID Safety Protocols for Federal Contractors, dated September 9, 2021 (published in the Federal Register on September 14, 2021, 86 FR 50985).

**(c) Personal Services Contracts with individuals.** As a matter of policy, the contractor must comply with the USAID’s guidance applicable to direct-hire federal employees.

**(End of clause)**

Notice Regarding Any Court Order Affecting the Implementation of E.O. 14042 USAID will take no action to enforce the clause (FAR 52.223-99) implementing the requirements of Executive Order 14042, absent further written notice from USAID, where the place of performance identified in the contract is in a U.S. state or outlying area subject to a court order prohibiting the application of requirements pursuant to the Executive Order (hereinafter, “Excluded State or Outlying Area”). In all other circumstances, USAID will enforce the clause, except for contractor employees who perform substantial work on or in connection with a covered contract in an Excluded State or Outlying Area, or in a covered contractor workplace located in an Excluded State or Outlying Area. A current list of such Excluded States and Outlying Areas is maintained at <https://www.saferfederalworkforce.gov/contractors/>.

**[END OF PROVISION]**