



USAID | PHILIPPINES

FROM THE AMERICAN PEOPLE

SOLICITATION NUMBER: 72049223R00006

ISSUANCE DATE: June 2, 2023

CLOSING DATE/TIME: July 15, 2023, 4:30 PM
Philippine time

**SUBJECT: Solicitation for U.S. Personal Service Contractor (USPSC Resident-Hire)
Financial Specialist**

Dear Prospective Offerors:

The United States Government, represented by the U.S. Agency for International Development (USAID), is seeking offers from qualified persons to provide personal services under contract as described in this solicitation.

Offers must be in accordance with **Attachment 1** of this solicitation. Incomplete or unsigned offers will not be considered. Offerors should retain copies of all offer materials for their records.

USAID will evaluate all offerors based on the stated evaluation criteria. USAID encourages all individuals, including those from disadvantaged and under-represented groups, to respond to the 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.

Any questions must be directed in writing to the Point of Contract specified in Attachment 1.

Sincerely,



6/2/23

Jeff Sharp

Supervisory Executive Officer/Contracting Officer

I. GENERAL INFORMATION

1. SOLICITATION NO.: 72049223R00006
2. ISSUANCE DATE: June 2, 2023
3. CLOSING DATE AND TIME for RECEIPT OF OFFERS: July 15, 2023, 4:30 PM Philippine time
4. POINT OF CONTACT: Weng Salud, e-mail at aidmnlhr@usaid.gov
5. POSITION TITLE: Financial Specialist
6. MARKET VALUE: \$71,099 to \$92,429 equivalent to **GS-12**.
Final compensation will be negotiated only **within** the listed market value and will depend on experience, qualifications, and salary history. *(This is a resident-hire position. It does not include offshore benefits such as housing, post differential and post allowance.)*
7. PLACE OF PERFORMANCE: USAID/Philippines.

Overseas USPSCs may be authorized to telework or remote work only from a location within the country of performance, in accordance with Mission policy. Telework or remote work from outside the country of performance may only be authorized in certain situations in accordance with the terms and conditions of the contract.

8. PERIOD OF PERFORMANCE: The base period will be two years, estimated to start on or about September 2023 or immediately upon receipt of security and medical clearances. Based on Agency need, availability of funds and satisfactory performance, the Contracting Officer may exercise additional option periods for up to three years for the dates estimated as follows:

Base Period	o/a September 2023 - September 2025
Option Period 1	o/a September 2025 - September 2026
Option Period 2	o/a September 2026 - September 2027
Option Period 3	o/a September 2027 - September 2028

9. ELIGIBLE OFFERORS:
 - Eligible Family Members (USEFMs and EFMs with U.S. permanent residence status (“Green Card” Holders);
 - U.S. citizen or permanent resident/registered alien (“green card holder”) who are currently residing in the Philippines with work permit;
 - U.S. – Philippine Dual Citizens;
 - Demonstrated ability to obtain a FACILITY ACCESS level security clearance;
 - Ability to obtain a Department of State medical clearance;

- Must not appear as an excluded party in the System for Award Management (SAM.gov).

10. SECURITY LEVEL REQUIRED: Facility Access Clearance

11. STATEMENT OF DUTIES:

Serves as a Financial Specialist in the Regional Financial Services Center (RFSC), in USAID/Philippines. The Specialist serves as an integral member of the team and works under the general supervision of the Deputy Controller. S/He is responsible for: (a) Providing financial management services to USAID/Philippines, Pacific Islands, Mongolia, and the Office of Bureau for Humanitarian Assistance (BHA}, and the Office of the Inspector General (OIG) Asia Region Manila Sub-office; (b) promoting sound financial management practices and providing assistance to Clients, their respective Contractors, Recipients, and to the Host Country Governments, so that an adequate level of accountability and control exists within those organizations in accordance with generally accepted financial management standards; (c) assisting with the execution of tasks necessary to achieve USAID's goals and objectives, and ensuring that the Mission resources are safeguarded from possible fraud, waste, misuse, and abuse; (d) engaging in the completion of pre-award assessments, audit management and financial reviews of USAID Contractors and Grantees; (e) participating in the annual Federal Managers' Financial Integrity Act (FMFIA) reviews and semi-annual Management Council on Risk and Internal Control (MCRIC) meetings; (f) providing technical guidance in the preparation of financial review reports, and using analytical skills to assess the financial performance of USAID Contractors and recipients; (g) identifying internal control weaknesses, opportunities and risks while sharing best practices with USAID colleagues and implementing partner organizations.

The Specialist also serves as a Certifying Officer (CO) and is responsible for the final review and authorization of vouchers for payment. To avoid personal liability, s/he must be knowledgeable of financial and internal controls and comply with established payment procedures. S/He is responsible for ensuring that funds are legally available for payment, services for which bills have been presented and have been delivered, advancement of funds prior to the delivery of services is legal and appropriate, voucher computations are accurate, and that any illegal, improper, unsupported, or incorrect payment requests are not certified for payment. S/He exercises sound judgement in examining and reviewing vouchers for payment. Refers to complex government guidelines when determining whether to allow or disallow all or a portion of payment requests funded with US dollar and local currency Trust-funded appropriations. S/He has no public funds in their physical possession but may be potentially liable for and required to make good to the U.S. Government the amount of any illegal or improper payment.

As a member of the RFSC Senior Management Team, along with the Controller and the Deputy Controller, the Specialist will be responsible for providing subject matter expertise and advice on financial management practices, internal control procedures, risk management, and interpretation of and compliance with Agency policy, regulations, and reporting requirements.

The Specialist will report to the Mission Controller and will be assisted by the supervisors of RFSC sections. Coaching and mentoring of section staff, including supervisors and team leads together with providing implementing partners and mission-wide training on financial management topics will be an essential part of the Specialist responsibilities.

MAJOR DUTIES AND RESPONSIBILITIES:

The specific duties of the Financial Specialist include the following:

I. Financial and Accounting Operations (60%)

A. Payments/Accounts Payable Certification (35%)

Reviews for correctness and certifies for payment complex invoices and/or claims for payment involving program-funded contracts and grants, including cash advance, fixed fee, and cost reimbursement payment requests. Reviews and certifies a full range of complex operating expense administrative claims, including international travel vouchers, domestic (temporary duty) assignment vouchers, and other entitlement payments. The Specialist's review and analysis include:

1. Ensures that the payment request is in accordance with the provisions, terms, and conditions of the obligating document.
2. Confirms that the obligation contains appropriate authorizations and administrative approvals and is supported by proper evidence showing that a valid, binding agreement has been executed and properly recorded.
3. Verifies that funds are available and that established controls to prevent improper or duplicate payments are in place and effectively working.
4. Approves or rejects vouchers within required timelines under the Prompt Payment Act.
5. Prepares and communicates the rationale concerning any portions of a claim where payment is suspended or disallowed.
6. Disburses payments in accordance with United States Government (USG) and host country laws and regulations.
7. Communicates with payees and other Mission staff to provide guidance, interprets the agency's voucher auditing requirements, and/or requests clarifying information regarding proposed payments requested.
8. Supervises the Mission cashier function, verifies petty cash disbursement transactions and conducts random cash counts to ensure that amounts are correct, and a sufficient level of cash exists to meet the Mission's petty cash needs. Approves cash replenishment requests in accordance with Department of State cashier operations policies and regulations.

B. Accounting Operations (15%)

1. Reviews quarterly accrual computations for reasonableness and completeness prior to recording in the Agency's financial reporting application.
2. Reviews and approves International Cooperative Administrative Support Services (ICASS) interim and final invoices, and details of proposed charges to be billed by the Department of State for shared services rendered to USAID/Philippines and clients. Reviews and verifies subscription of services and workload counts. Analyzes ICASS costs and trend reports and bring any significant variances to management's attention, Represents USAID in the ICASS budget meetings in the absence of the Controller and Deputy Controller.
3. Reviews and approves Global Acquisition and Assistance System (GLAAS) procurement requests, including incremental funding and de-obligation of funds in existing procurements.
4. Reviews and approves official travel authorization requests in accordance with USAID's policy directives and required procedures governing domestic and international travel.
5. Monitors, reviews, and approves excess operating expense and program funds for de-obligation.

C. Other Financial Management Responsibilities (10%)

1. Prepares, edits, reviews, and/or updates Mission Orders that are financial in nature, for issuance to the entire Mission.
2. Analyzes proposed revisions to USAID's Automated Directives System (ADS) and prepares feedback to be communicated to the Office of the Chief Financial Officer on behalf of the Mission.
3. Reviews and updates internal financial management procedures.
4. Conducts external training for implementing partners on USAID financial management practices and facilitates internal staff training on new financial management policies and sound internal control practices, as required.
5. Assists the Controller/Deputy Controller with implementation of measures to ensure appropriate procedures and internal controls are in place and integrates changes into standard practice.

II. Financial Analysis, Audit Management, and Compliance (40%)**A. Financial Reviews and Pre-Award Assessments (25%)**

As appropriate or required, leads, and coordinates comprehensive financial reviews in the form of control environment and risk assessments, cost effectiveness assessments, disbursement reviews, indirect cost rate reviews, pre-award surveys, pre-closeout and closeout reviews of USAID-funded organizations to determine the levels of accountability and adequacy of control environments within those organizations. Identifies and coordinates the capacity building needs identified from pre-award

assessments, develops an Action Plan or a Scope of Work (SOW), and oversees implementation to address these needs. Monitors the Contractor and Recipient's corrective action plans and serves as an advisor to the Regional Acquisition and Assistance Office for the inclusion of pre-award conditions prior to issuance of an award. In conjunction with assessments conducted, participates in the facilitation of relevant FM training and technical assistance to the Mission/Client Missions, Recipients and Contractors to strengthen internal controls, management systems, and build the capacity of local Non-Governmental Organizations (NGOs) and Host Country Government Implementing Agencies. Provides technical guidance and direction to the Financial Analysts in the drafting and preparation of financial review reports and pre-award assessment recommendations.

B. Audit Management and FMFIA Review (15%)

Acts as the Audit Management Officer's designee and assists the Technical Offices in meeting their audit management responsibilities. Assists in the interpretation of audit findings and recommendations, gathering of data, drafting of responses, and implementation of corrective actions geared towards timely resolution and closure of audit recommendations. Coordinates with USAID Contractors, recipients, audit firms, the USAID Office of the Inspector General (OIG), and Financial Analysts in addressing audit recommendations and bringing audit findings to a resolution.

Assists the Supervisory Financial Analyst in coordinating the Mission's annual Enterprise Risk Management assessment and Federal Manager's Financial Integrity Act (FMFIA) Review of management controls. Works closely with the cognizant support and technical offices to address required corrective actions and obtain **full** resolution and closure of any identified internal control weaknesses and deficiencies. Assists with the performance of strategic risk assessment, and the scope and objectives of the FMFIA exercise. Provides guidance and recommendations to the Financial Analysts, and reviews testing plans, sample selections, and test results. Participates in the preparation of the agenda and Discussion Paper for the Mission's Management Council on Risk and Internal Control (MCRIC).

SUPERVISORY RELATIONSHIP AND SUPERVISORY CONTROLS

The Specialist works under the general supervision of the Deputy Controller, however, carries out assignments independently, referring only complex issues as needed to the supervisor. S/He independently plans, organizes, and carries out their work. In the absence of the Deputy Controller, the Specialist will work under the general supervision of the Controller.

12. PHYSICAL DEMANDS:

The work requested does not involve undue physical demands.

II. MINIMUM QUALIFICATIONS REQUIRED FOR THIS POSITION

- a. **EDUCATION:** A Bachelor's Degree in Accounting, Finance, Business Administration or related field with a minimum of 24 credit hours in Accounting required.
- b. **WORK EXPERIENCE:** A minimum of five (5) years of work experience in the U.S. government, private sector, or non-government organization financial management is required. Strong background and work experience in accounting and financial operations, performing financial compliance activities and managing audits.
- c. **JOB KNOWLEDGE:** Knowledge of accounting standards, financial management statutes, regulations, policies, and procedures. Ability to quickly gain knowledge of USAID's programs and financial operations, including the ability to provide guidance and advice on transactions and compliance activities.
- d. **SKILLS AND ABILITIES:**
 - Strong time-management skills, and the ability to manage multiple, competing priorities. Attention to detail required.
 - Ability to research, interpret, and apply federal regulations and Agency policies to complex scenarios.
 - Strong analytical and critical thinking skills required to conduct financial reviews. Excellent problem-solving and decision-making skills in the absence of complete or perfect information.
 - Proficiency in Google applications (Gmail and Google Docs) and Microsoft Office (Word, Excel, Access, and PowerPoint). Intermediate to advanced MS Excel skills, with the ability to use formulas, pivot tables, and financial models to identify variances, analyze trends and make a determination on the effective management of USG funds.
 - Ability to evaluate financial aspects of activities and programs, institutional capabilities, and the adequacy of accounting, financial management and internal controls. Skill in presenting recommendations to a broad audience, both orally and in writing.
 - Exceptional report-writing skills required to document financial review results and propose recommendations to strengthen USAID partners' internal controls and management of USG funds. Ability to share best practices and serve as a mentor to Financial Analyst team members.
 - Must possess good communication and interpersonal skills and be able to maintain effective working relationships with both internal and external stakeholders.
 - Ability to work well in teams.

III. EVALUATION AND SELECTION PROCESS

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>.

The technical evaluation committee may conduct reference checks, including references from individuals who have not been specifically identified by the offeror, and may do so before or after a candidate is interviewed.

After the closing date for receipt of offers, a Technical Evaluation Committee will be convened to review offers and evaluate them in accordance with the evaluation criteria. Offerors who clearly meet the aforementioned minimum qualification requirements may be further evaluated through review of the offeror's submitted required documents and ranked based on the below evaluation and selection factors.

EVALUATION FACTORS

1. EDUCATION (15 points)
2. WORK EXPERIENCE (35 points)
3. JOB KNOWLEDGE (25 points)
4. SKILLS AND ABILITIES (25 points)

A competitive range may be established of the highest-ranked offerors, who may be further evaluated through written tests, interviews, and reference checks to determine the most qualified/highest-ranked offeror.

Only finalists will be contacted by USAID with respect to their offers. No response will be sent to unsuccessful offerors. As part of the selection process, finalist offerors may be interviewed either in person or by telephone at USAID's discretion.

The selected offeror must obtain required security clearance level, within a reasonable period of time, from USAID's Office of Security in Washington, D.C. USAID will provide further guidance to the successful offeror.

USAID expects to award a personal services contract for the period of performance commencing as early as practically possible subject to security and medical clearances and funds availability.

III. SUBMITTING AN OFFER

1. Eligible offerors are required to complete and submit form **AID 309-2**, "Offeror Information for Personal Services Contracts with Individuals," available at <https://www.usaid.gov/forms>.
2. Offers must be received by the closing date and time specified in **Section I item #3** and submitted to the Point of Contact in **Section I item #4**.
3. Offeror submissions must clearly reference the Solicitation Number on all offeror-submitted documents.
4. A type-written and signed cover letter of no more than two (2) pages specifically applying for this position and addressing the minimum requirements and evaluation factors of the position.
5. A current Curriculum Vitae (CV) or Resume (without photo), which, at a minimum, describes education, latest experience, and career achievements.
6. Offers must provide a minimum of three (3) and a maximum of five (5) references within the last five years from the offeror's professional life, namely individuals who are not family members or relatives. Three (3) references must be from direct supervisors who can provide information regarding the applicant's work knowledge and professional experience. Applicants must provide e-mail addresses and/or working telephone numbers for all references.
7. Copies of diploma, certificates and relevant degrees should be included in the application package to corroborate the CV/Resume.
8. Limit all electronic (e-mail) submissions to one entry/email not larger than 5MB. Please submit attachments in PDF. Application packages must be submitted electronically to aidmnlhr@usaid.gov.
9. **Ensuring Adequate COVID-19 Safety Protocols for Federal Contractors** – Please be advised that upon award, the contractor may 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. *

USPSCs performing overseas must follow the Mission policies and/or directives from the U.S. department of State regarding COVID-19 requirements.

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

By submitting your offer materials, you certify that all of the information on and attached to the offer is true, correct, complete and made in good faith. You agree to allow all information on and attached to the offer to be investigated.

V. LIST OF REQUIRED FORMS PRIOR TO AWARD

The CO will provide instructions about how to complete and submit the following forms after an offeror is selected for the contract award:

For Medical clearance:

- DS-1843 Medical History and Examination - for individuals age 12 and older.
- DS-1622 Medical History and Examination - for children age 11 and younger.
- DS-3057 Medical Clearance Update (MCU).

Forms found at <https://www.state.gov/forms-medical-clearances/> (USN)

For Security Clearance:

Forms outlined below can be found at: <http://www.usaid.gov/forms/>

- (1) Offeror Information for Personal Services Contracts with Individuals (AID 309-2)
- (2) Contractor Physical Examination Form (AID Form 1420-62) *
- (3) Questionnaire for Sensitive Positions (for National Security) (SF-86) * or
- (4) Questionnaire for Non-Sensitive Positions (SF-85) *
- (5) Fingerprint Cards (FD-258) *

***The above listed forms for Medical and Security Clearances shall only be completed upon the advice of the Contracting Officer that an applicant is the successful candidate for the job.**

VI. BENEFITS AND ALLOWANCES

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

BENEFITS

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

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.usaid.gov/sites/default/files/documents/1868/aidar_0.pdf.
2. **Contract Cover Page form AID 309-1** available at <https://www.usaid.gov/forms>. Pricing by line item is to be determined upon contract award as described below:

Item No.	Supplies/Services (Description)	Quantity	Unit	Unit Price	Amount
0001	Base Period – Compensation, Fringe Benefits and Other Direct Costs (ODCs) Award Type: Cost Product Service Code: R497 Accounting Info: TBD	1	Lot	\$ TBD	\$ TBD at Award after negotiations with Contractor
1001	Option Period 1 – Compensation, Fringe Benefits and Other Direct Costs (ODCs) Award Type: Cost Product Service Code: R497 Accounting Info: TBD	1	Lot	\$ TBD	\$ TBD at Award after negotiations with Contractor
2001	Option Period 2 – Compensation, Fringe Benefits and Other Direct Costs (ODCs) Award Type: Cost Product Service Code: R497 Accounting Info: TBD	1	Lot	\$ TBD	\$ TBD at Award after negotiations with Contractor
3001	Option Period 3 – Compensation, Fringe Benefits and Other Direct Costs (ODCs) Award Type: Cost Product Service Code: R497 Accounting Info: TBD	1	Lot	\$ TBD	\$ TBD at Award after negotiations with Contractor
4001	Option Period 4 – Compensation, Fringe Benefits and Other Direct Costs (ODCs) Award Type: Cost Product Service Code: R497 Accounting Info: TBD	1	Lot	\$ TBD	\$ TBD at Award after negotiations with Contractor

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>

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/work-usaid/personal-service-contracts-ombudsman>.

The PSC Ombudsman may be contacted via: PSCOmbudsman@usaid.gov.