USAID Development Program Specialist (Budget)

13. BASIC FUNCTION OF POSITION

The Development Program Specialist (Budget) position is located in the Office of Program, Policy and Management (OPPM) and s/he works under the direct supervision of the OPPM Director.

OPPM provides support to the Mission in all aspects of the program cycle, financial management, acquisitions and assistance, communications, and information technology. The Development Program Specialist (Budget) is the Mission’s expert on matters related to USAID budget systems and procedures and provides a wide range of services in support of achieving Mission development objectives. These services include planning (strategic and activity planning, budgeting and negotiation); achieving (activity management and implementation); monitoring and reporting results, and evaluation. The Job Holder must exercise superior interpersonal and program leadership skills as success is dependent on good judgment in combination with liaison/networking between appropriate Mission staff, senior level representatives of cooperating government agencies and regional institutions, public and private organizations (including NGOs), and other donors.

14. MAJOR DUTIES AND RESPONSIBILITIES % OF TIME

A. Program Budget Analyses and Documentation. 50%

Applying comprehensive knowledge of USAID systems, serves as the Mission’s expert and overall manager of the annual program budget formulation, analysis and execution process for the USAID Mission in Jamaica. S/he serves as the Senior Advisor to Mission Management on budget issues; leads coordination with all technical teams to analyze and identify funding needs and ensure timely utilization of funds; analyzes and determines obligating approaches; develops strategies for managing earmarks and directives; actively participates in and provides budget data and in-depth analysis for all portfolio and financial reviews; and works with technical teams to identify current and future financial requirements in order to determine any reprogramming needs, and effects such actions. Budget and explanatory text submissions must be accurate, timely, reflective of Mission priorities and needs, and responsive to the requester's information requirements. Analyzes budget information (rates of expenditure, projected future needs, etc.) and advises OPPM Director and Mission Management on all matters related to resource planning and management in order to ensure the proper and timely use of funds.

S/he prepares all budgetary documentation required by the Mission and briefs Mission Management and technical team leaders (under strict, and at times, extremely short deadlines) on the budget sections of the annual reports for both the bilateral and regional program, including:

a. USAID's Performance Plan and Report submission (budget tables showing FY budget levels).
b. USAID's Congressional Budget Justification submission.
c. The Planning Institute of Jamaica Economic and Social Survey of Jamaica.

The Job Holder:
1. Manages Mission budget systems including the Field Support Database.

2. Based on expert analysis of each technical team budget, prepares and submits Mission's requests such as the Congressional Budget Justification, pipeline analysis, mortgage analysis, and out-year projections.

3. Monitors Bureau projected country allocations. Monitors yearly allowances to ensure consistency with requested levels. Informs mission managers in advance of possible budget windfalls/shortfalls to enable timely revision of annual work plans or planned new activities, as appropriate. Advises Mission Management on the rationale and advantages/disadvantages of each. Develops and submit written analysis and justification to secure funding.

4. Develops and implements an annual obligation plan. Ensures all pre-obligation requirements are met and yearly obligation Agreements are in accordance with guidance in Section B above.

5. Tracks and monitors funds to ensure that sufficient funds are available to implement all approved activities in accordance with Agency guidance and to adequately forward-fund annual work plans by analyzing budget situation and options. Identifies creative ways to stretch the Mission's budget resources.

6. Develops alternative spreadsheet budget scenarios and recommendations.

7. Establishes and maintains official budget files.

To accomplish these tasks, the Job Holder consults with Mission Management (with emphasis on the Office of the Director and Office of the Controller) and Technical Team leaders on program priorities; applies knowledge of likely funding availability, Congressional and Agency budget policies, earmarks and directives; accesses and uses Phoenix Accounting System reports and other information to assess expenditure trends, pipelines, mortgages, counterpart contributions and past performance in achieving results.

In addition, Job Holder works independently using data available from technical teams and Phoenix Accounting System reports from the Office of the Controller, and also ensures that the Country Representative, Supervisory Program Officer, Director of the Office of Program, Policy and Management, Regional Controller, and LAC/SPO budget experts have current information at their fingertips/on-demand.

B. Strategic Planning and Results Monitoring and Evaluation. 30%
The Job Holder serves as the senior expert technical advisor and lead budget specialist to technical teams and Mission Management on all aspects of strategic planning, budgeting, analysis, interpretation and execution, results monitoring and evaluation, often advising Mission Management and Technical Teams on budget-related issues and specific program policy decisions. Such assistance involves both strategic and activity-level planning, program monitoring, and achieving results in accordance with the ADS. The Job Holder:

1. Oversees the development, review, submission and justification of program documents, including the bilateral and regional strategies, annual reports and Congressional Budget Justifications. Provides guidance and clarification to all technical teams; reviews narratives and performance data for substance and quality; and supervises document production. The Development Program Specialist (Budget) works closely with the US Embassy in Kingston in the development of the annual Performance Plan and Report; Ensures documents are consistent with the USG and Agency strategic goals and parameters.

2. Provides technical direction to technical teams for the development of the Mission Semi-annual Portfolio Reviews, and follows-up on actions agreed upon as a result of the reviews.

3. Provides oversight, advice and support to all DOs with respect to Agency guidance on program assistance, strategic planning, customer service, gender concerns, program evaluations and managing for results and oversight/supervision of reporting on the program budget process.

4. Working with the Resident Legal Officer (RLO), ensures all pre-obligation requirements are met, including ensuring countries and activities are in compliance with legal and legislative requirements via accuracy of country and assistance checklists. Advises DO teams of legal and legislative changes and ensures they are responsive to the specific guidance.

5. Serves as Mission's expert on Development Objective Grant Agreements). Develops, with RLO guidance negotiates, and provides advice on bilateral Development Objective Grant Agreements and sub-agreements and follow on Amendments and Implementation Letters ensuring that host country partners are substantively engaged in program planning. Facilitates obligations into the Regional Development Objective Grant Agreements for PEPFAR activities.

6. Monitors the Mission's evaluation schedule. Provides oversight, advice, and support to all DO teams on Agency guidance on evaluation process and reporting; provides guidance on problematic/complicated issues related to project planning, execution and/or evaluations; and
7. Provides support to DO teams on developing and monitoring Project and Activity Monitoring, Evaluation and Learning Plans, which includes developing and refining results frameworks, performance indicators and targets, and data collection methods and schedule of collection for all required data. Ensures data collection is in compliance with Agency requirements and monitored regularly.

This work is accomplished utilizing project/activity development skills and program and budget expertise, including knowledge of ADS, Agency and Mission "best practices," teamwork and participation, managing for results, strategy definition and analyzing performance data.

C. Activity Planning, Achieving, Briefing Materials 20%

The Job Holder proactively serves as a member of DO teams providing quality control oversight and delivery of program guidance to the teams. S/he is called upon to prepare briefing material for senior managers which, at times, is the critical foundation for rapid response requests. The Job Holder:

1. Provides specialized guidance on developing and preparing design documents for Project Appraisal Documents. Ensures the design process is participatory with all major partners, stakeholders, and customers. Provides advice to the team on conceptualizing, and/or modifying activities under the strategies. Ensures planning is consistent with Agency activity budget codes. Provides expert interpretation of Agency guidance on programming and achieving including feasibility analysis requirements.

2. Provides on-the-job training as necessary to technical teams in carrying out specific activity-level planning and achieving functions.

3. As the Senior Program Management Specialist, participates in the preparation, clearing, quality control and approval of activity acquisition and assistance instruments, i.e., annual workplans and budgets, procurement actions, evaluations and audits. Provides expert advice to ensure adherence to all USAID and GOJ program policies and regulations. Review all documents prepared by teams for compliance with ADS, Bilateral Agreements, Conditions Precedent, Covenants, and Counterpart Contributions. Ensures proper preparation, clearance, quality control of all documentation necessary for implementation, such as Agreements, IL, and MOUs, as well as drafts and/or manages the requisite for Action Memoranda, Agreement Amendments, IL, and Scopes of Work, MAARDS, etc.

4. Reviews technical proposals.

5. Prepares briefing materials which are critical contribution to implementation of the Mission's customer service plan; briefing materials on the substance of the USAID, a core function of the Program Office; prepares summary reports for counterparts and
6. Prepares text, budget tables, and graphics for presentations, brochures, and other special reports USAID.

15. QUALIFICATIONS REQUIRED FOR EFFECTIVE PERFORMANCE

a. **Education:** Possession of a Bachelor’s degree in administration, accounting, financial management or social science such as public administration, and economics is required.

b. **Prior Work Experience:** A minimum of five years of professional experience in accounting, financial management, public administration, or program management experience with other international or local donors/organization, non-government organizations and/or private sector.

c. **Post Entry Training:** Familiarization training in USAID-specific procedures, regulations, and methods will be provided. Orientation to working from a donor-Agency perspective, etc., will be provided. Formal COR/AOR certification courses, training to maintain professional capability in the field, and other courses offered for professional USAID staff, will be provided as appropriate; and, courses, seminars, conferences, and other activities in fields related to the function, and needed to maintain and update professional qualifications, will be provided as they become available, subject to availability of funds.

d. **Language Proficiency:** Level IV English, both oral and written, is required.

e. **Job Knowledge:** The Job Holder must have demonstrated expert level knowledge of budgeting and financial management, including database management. S/he must also have a general knowledge of the development challenges facing Jamaica and general economic development concepts which include sustainable development and the potential economic, social and cultural impacts of development activities. S/he must have working knowledge of private, public, and non-governmental approaches to integrated development, and government policy priorities and institutional structures/functions. S/he must have an understanding of the USG's foreign policy interests in Jamaica, as well as USAID's general priorities, systems, and procedures. His/her experience must reflect a firm understanding of general development theory, and a strong working knowledge of accounting and financial analysis.

f. **Skills and Abilities:** The position requires extremely strong budget, financial analysis, management and the ability to gather, analyze, and report financial and budget data; develop and present financial plans; and explain detailed financial information to non-experts. Collegiality and attention to detail under pressure will be extremely important for success in this position. Expert skills in guiding and working as a team member with technical officers...
and Mission management to ensure that available financial resources are optimally allocated to achieve strategic results. Ability to project required budget and expenditure levels based on sound knowledge of USAID's projects and goals is key to the success of the position. In addition, strong interpersonal and communication skills will be needed for excellent working relationships with technical teams, administrative support offices, USAID/Washington and with the Ministry of Finance and Planning Institute of Jamaica (PIOJ). Detailed familiarity with spreadsheet programs, including Excel is required. Skill with spreadsheets and other frequently used programs is to be complemented by the ability to analyze/evaluate strategic plans and budget essentials. An ability to prepare, produce and present documents that are well written (clear, concise and accurate), requiring little or no editorial changes prior to distribution is critical. The Job Holder will be expected to edit technical documents for clarity and style.

16. POSITION ELEMENTS

a. **Supervision Received:** The Development Assistance Specialist (Budget) reports directly to the OPPM Director. The Job Holder works independently with some latitude in planning and executing work assignments prioritizing duties and responsibilities to ensure deadlines are met. The Office Director is available for consultation on program and policy issues. S/he will be expected to perform the full range of range of duties with only general guidance from the supervisor. He/she must be proactive in flagging issues/problems which merit attention by the supervisor and/or Mission Management.

b. **Supervision Exercised:** The supervision of other USAID staff is not contemplated.

c. **Available Guidelines:** The Specialist follows USAID operating policies, Mission Orders, guidance provided by the Automated Directive System (ADS), and oral instructions from the supervisor. Other guidance comes from USAID Handbooks or their ADS replacements; the Project Officers Guide Book and the Evaluation Handbook; the Federal Acquisitions Regulations Handbook; host government policies; and, established administrative procedures and regulations, as well as situational counsel and information provided by USAID/Washington - Latin America & the Caribbean/Strategy and Program Office (LAC/SPO); Congressional budget directives; and Agency budget policy directives; Country and Assistance Check Lists.

d. **Exercise of Judgment:** Sound judgment is critical to success and is reflected in the quality and thoroughness of the budgetary analysis/projections, the appropriateness of recommendations, and in the contribution the Job Holder will make as a technical team member. The Job Holder must be able to work independently, be able to initiate and complete tasks with minimal supervision, and take action to resolve problems when contact with the supervisor is not available as is frequently encountered in development programs where either the Job Holder or supervisor is in travel status. Diplomacy and tact must be used in contact with Team Leaders and counterparts while ensuring that USAID requirements are fully addressed.
e. **Authority to Make Commitments:** The Job Holder documents proposed funding levels directly with the Senior Program Budget Director (LAC/SPO) in USAID/W. Although the Job Holder does not have independent commitment authority, his/her analyses and recommendations are given considerable weight when Mission policy decisions are made.

f. **Nature, Level, and Purpose of Contacts:** The Job Holder works directly with Mission management (Director), Controller, Supervisory Program Officer, OPPM Director, Technical Office Directors, Project Management Specialists, and LAC/SPO on multi-year program planning, pipeline management, and documentation. Frequent liaison at the sub-ministerial level (e.g. Directors of PIOJ, Ministry of Finance, Ministry of National Security, Ministry of Justice, Ministry of Education) to ensure understanding of funding levels, and problem resolution as necessary.

g. **Time Expected to Reach Full Performance Level:** One (1) year.

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