



Bureau for Management Customer Service Standards

A Mandatory Reference for ADS Chapters 301, 401,
501, and 620

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*U. S. Agency for
International Development*
***CUSTOMER SERVICE
STANDARDS***
for the
MANAGEMENT BUREAU

FEBRUARY 2003

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BACKGROUND

In April 2002, the Business Transformation Executive Committee (BTEC) approved the establishment of a working group to develop customer service standards for USAID/Washington organizations. The development of customer standards directly addresses one of Administrator Natsios' seven management reform principles: establish a customer service culture in our service organizations to support and facilitate smooth and efficient program delivery.

The working group, led by a senior official in the Bureau for Global Health, is comprised of staff from the Management Bureau, independent offices, pillar and geographic bureaus. The working group organized this transformation project into multiple phases. Phase I resulted in the development of M Bureau customer service standards. An "*M Team*" was responsible for preparing this booklet. The "*M Team*" consisted of USAID Civil Service and Foreign service Officers whose federal experience ranged from 13 to 32 years of service.

The customer service standards booklet is organized by "chapters" for each of the six M Bureau Offices. Each chapter includes an Introduction that provides functional descriptions of the Office and subordinate Divisions. A Service Provider section lists the names of managers and supervisors and the primary functions of their organizations. A Quality Service Plan lists major services offered and corresponding performance standards for an *ACCEPTABLE* level.

The next phase of this project, targeted for completion in June 2003, will result in customer service standards for the Pillar Bureaus. Geographic Bureaus and independent offices are scheduled to have standards in place by December 30, 2003.

***OFFICE OF
PROCUREMENT
(M/OP)***



INTRODUCTION

The USAID Office of Procurement is one of six components of the Management Bureau for the United States Agency for International Development. The acronym used within the Agency is M/OP.

M/OP consists of the Chief Acquisition Officer and the following eight units:

- 1) An Ombudsman
- 2) Three Contract Operational Divisions
- 3) Policy Division
- 4) Evaluation Division
- 5) Transportation and Commodity Division
- 6) Procurement Support Division

- ◆ The primary responsibility of the **Office of the Director (M/OP/OD)** is to manage, direct, and serve as the Agency's principal advisor regarding the Agency's implementation of programs through service and commodity Acquisitions and Assistance (A&A).
- ◆ The **Ombudsman** responsibilities include Alternative Disputes Resolution, outreach activities, and liaison to the acquisitions community.
- ◆ The three **Contract Operation Divisions are Humanitarian Response, Africa and Management (M/OP/HRAM), Global (M/OP/G), and Europe, Eurasia and Regional (M/OP/EER)**. The primary responsibility of the three divisions is to provide professional advice and manage the award instruments that implement the Agency's programs including contracts, grants, cooperative agreements and participating agency agreements.
- ◆ The primary responsibility of the **Policy Division (M/OP/POL)** is to review and interpret acquisition and assistance regulations and to develop specific policy standards, guidelines, procedures, and instructions for USAID A&A awards instruments.
- ◆ The primary responsibility of the **Evaluation Division (M/OP/E)** is to conduct evaluations of worldwide A&A operations, review unsolicited proposals, recommend delegations of authority, administer the Procurement Management Certification Program, formulate policy regarding contract/grantee and marine insurance matters, and to manage the purchase card program for the Agency.
- ◆ The primary responsibility of the **Transportation and Commodity Division (M/OP/TC)** is to procure and manage ocean and transportation services including emergency air charter services, to monitor commodity procurement, and to enforce USAID air and ocean transportation regulations and policies.
- ◆ The primary responsibility of the **Procurement Support Division (M/OP/PS)** is to provide Acquisition and Assistance (A&A) data for Agency-wide reports to Congress, manage the Agency's automated system for procurement data, negotiate and administer indirect cost rate agreements for organizations that USAID has oversight, and to provide cost audits, audit resolutions, and closeout services to the Agency.

The Office of Procurement Headquarters is located in Washington, D.C. and consist of 1 Office Director, 2 Deputies, 1 Ombudsman, 7 Division Chiefs, and a staff of 118 Direct Hires which is supplemented by Personal Service Contractors. The Washington, D.C. staff consists of Civil Service and Foreign Service Direct Hires. The Headquarters also employs 47 Foreign Service Contract Officers (CO) in 30 USAID Overseas Missions.

USAID
Management Bureau
Office of Procurement
Services Provided

Office of the Chief Acquisition Officer (M/OP)

Timothy T. Beans, Chief Acquisition Officer

- ◆ A&A system certification for Administrator
- ◆ Coordination Agency A&A training programs

Deputy Director of Policy (M/OP/OD)

Kathleen O'Hara, Deputy Director

- ◆ Oversight and management of Policy, Evaluation, Support, and Transportation Divisions, and
- ◆ Agency Competition Advocate

Deputy Director of Operations (M/OP/OD)

Vacant, Deputy Director

- ◆ Oversight and management of Operation Divisions, M/OP/HRAM, M/OP/G, and M/OP/E&E

Ombudsman (M/OP/OD)

Jean C. Horton, Ombudsman

- ◆ Alternative Disputes Resolution, Outreach & Liaison to Acquisition Community

Humanitarian Response, Africa, and Management Division (M/OP/HRAM)

Mercedes Eugenia, Division Chief

- ◆ Advice to Customers
- ◆ Approval of Advance Procurement Plans
- ◆ Small Purchases
- ◆ Task and Delivery Orders
- ◆ Interagency Agreements
- ◆ Contracts/Grants/Cooperative Agreements

Global Division (M/OP/G)

Mark Walther, Division Chief

- ◆ Advice to Customers
- ◆ Approval of Advance Procurement Plans
- ◆ Small Purchases
- ◆ Task and Delivery Orders
- ◆ Interagency Agreements
- ◆ Contracts/Grants/Cooperative Agreements

USAID
Management Bureau
Office of Procurement
Services Provided

Europe, Eurasia and Regional Division (M/OP/EER)

Anne Quinlan, Division Chief

- ◆ Advice to Customers
- ◆ Approval of Advance Procurement Plans
- ◆ Small Purchases
- ◆ Task and Delivery Orders
- ◆ Interagency Agreements
- ◆ Contracts/Grants/Cooperative Agreements

Policy Division (M/OP/POL)

Raquel C. Powell, Division Chief

- ◆ A&A Waivers/Deviations for Agency
- ◆ Agency procurement policy advice

Evaluation Division (M/OP/E)

Kim Triplett, Division Chief

- ◆ Issue Warrants to EXOs, COs, Mission Directors, etc.
- ◆ Review Non-Competitive Justifications for Contracts
- ◆ Unsolicited Contract Proposal Review
- ◆ Purchase card issuance and management
- ◆ Review and issue suspensions/debarments
- ◆ Monitor Defense Base Act Insurance Contract
- ◆ Monitor medical evacuation contract
- ◆ Administrator's annual Procurement Executive Report
- ◆ Coordinate Acquisition & Assistance Training Programs for Procurement Professionals

Transportation and Commodity Division (M/OP/TC)

Robert Goldman, Division Chief

- ◆ Emergency Air Charters
- ◆ Procure Ocean Transportation Services
- ◆ Programmatic Oversight of Food Aid Transportation
- ◆ Agency Commodity Technical Assistance
- ◆ Air/Ocean Transport Regulation Enforcement
- ◆ Advance Procurement Plans

Procurement Support Division (M/OP/PS)

Terry Payne, Division Chief

- ◆ Senior Staff procurement data reports
- ◆ Congressional procurement data reports
- ◆ Cost accounting system validation
- ◆ Cost audits

- ◆ Provide audit and overhead advice to missions
- ◆ Contract/Grant Closeouts

USAID
Management Bureau
Office of Procurement
Quality Service Plan

M/OP/OD

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Manage, direct and serve as the Agency’s principal advisor regarding the Agency’s implementation of programs through service and commodity acquisitions and assistance. 	<ul style="list-style-type: none"> ◆ Achieve a 10% increase on customer service satisfaction survey conducted on an annual basis by the Administrator.

M/OP/HRAM, M/OP/G, & M/OP/EER

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Advice to Customers 	<ul style="list-style-type: none"> ◆ Provide ongoing expert advice regarding the appropriate acquisition or assistance instrument to achieve agency objectives as requested upon notification of customer needs. ◆ Meetings, conferences, telephone calls and e-mails are acknowledged or extensions requested and returned within 2 business days of customer request 75% of the time.
<ul style="list-style-type: none"> ◆ Advance Procurement Plans 	<ul style="list-style-type: none"> ◆ Provide initial or final insight as to the feasibility of procurement plans within 5 business days of submission from customer 75% of the time.

<ul style="list-style-type: none">◆ Small Purchases/Simplified Acquisitions	<ul style="list-style-type: none">◆ Non-competitive and competitive small purchase orders and simplified acquisitions will be completed within 15 to 30 business days respectively, upon receipt of an agreed upon contractible request (scope of work and/or product identification, budget, and required justifications/ waivers for non-competition, etc.) depending upon the complexity of the service/product 80% of the time.
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USAID
Management Bureau
Office of Procurement
Quality Service Plan

M/OP/HRAM, M/OP/G, & M/OP/EER (cont.)

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Task and Delivery Orders 	<ul style="list-style-type: none"> ◆ Task /delivery orders will be completed within 75 business days of receipt of an agreed upon contractible scope of work, budget, independent government estimate, and any necessary justifications and/or waivers 75% of the time.
<ul style="list-style-type: none"> ◆ Interagency Agreements 	<ul style="list-style-type: none"> ◆ PASAs and RSSAs will be completed within 50 business days of receipt of an agreed upon contractible statement of work, budget, independent government estimate, and any necessary justifications and/or waivers 75% of the time.
<ul style="list-style-type: none"> ◆ Contracts 	<ul style="list-style-type: none"> ◆ Non-competitive sole source awards will be completed within 135 business days and competitive awards will be competed within 240 calendar days of an agreed upon contractible statement of work, budget, independent government estimate, and any necessary justifications and/or waivers 75% of the time.
<ul style="list-style-type: none"> ◆ Grants and Cooperative Agreements 	<ul style="list-style-type: none"> ◆ Non-competitive awards will be completed within 90 business days and competitive awards within 150 business days of a final agreement on the program description, budget, independent government estimate, and any justifications and/or necessary waivers 75% of the time.
<ul style="list-style-type: none"> ◆ Modifications to Acquisition Instruments No-Cost, Increase to Total Estimated Cost (TEC) 	<ul style="list-style-type: none"> ◆ No-cost modifications will be completed within 10 business days and increases to TEC within 80 business days after receipt of all required documentation 75% of the time.

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Office of Procurement
Quality Service Plan

M/OP/POL

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Agency Acquisition and Assistance Advice to M/OP 	<ul style="list-style-type: none"> ◆ Provide policy guidance to OP staff or advise requestor how much additional time is needed to more thoroughly research the issue before providing policy guidance within 2 business days of receipt of an inquiry 75% of the time.
<ul style="list-style-type: none"> ◆ Acquisition and Assistance Deviations 	<ul style="list-style-type: none"> ◆ All deviations reviewed within 10 business days from receipt 75% of the time.

M/OP/E

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Coordinate Acquisition & Assistance Training Programs for Procurement Professionals 	<ul style="list-style-type: none"> ◆ Respond to individual and regional PMCP training needs and coordinate such training with HR and Missions on a case by case basis within 5 business days 75% of the time.
<ul style="list-style-type: none"> ◆ Issue Ad Hoc Warrants 	<ul style="list-style-type: none"> ◆ All authorized warrants issued within 5 business day from request after receipt of required documentation 75% of the time.

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Office of Procurement
Quality Service Plan

M/OP/E (cont.)

SERVICES OFFERED	PERFORMANCE STANDARDS
◆ Review Non-Competitive Justifications for contracts	◆ All justifications reviewed within 5 business days from request after receipt of required documentation 75% of the time.
◆ Unsolicited Contract Proposal Review	◆ All unsolicited proposals reviewed within 5 business days from request 75% of the time.
◆ Purchase Card Issuance and Management	◆ All authorized credit cards issued within 10 business days from request 75% of the time.
◆ Review Debarment/Suspension Requests	◆ Review initial suspension / debarment request within 10 business days from receipt 75% of the time.
◆ Monitor Defense Base Act Insurance Contract	◆ Respond to and assess problems within 5 business days of receipt 75% of the time.
◆ Monitor Medical Evacuation Contract	◆ Respond to and assess problems within 5 business days of receipt 75% of the time.

M/OP/TC

SERVICES OFFERED	PERFORMANCE STANDARDS
◆ Emergency Plan Charters	◆ Complete air charters within 4 business days of request 75% of the time.
◆ Ocean Transport Charters	◆ Complete charters within 90 business days from request 75% of the time.

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Office of Procurement
Quality Service Plan

M/OP/TC (continue)

<ul style="list-style-type: none"> ◆ Food Transport Oversight 	<ul style="list-style-type: none"> ◆ Respond to and assess problems within 2 business days of receipt 75% of the time.
<ul style="list-style-type: none"> ◆ Agency Commodity Technical Assistance 	<ul style="list-style-type: none"> ◆ Respond to and assess problems within 2 business days of receipt 75% of the time.

M/OP/PS

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Senior Staff Acquisition & Assistance Reports 	<ul style="list-style-type: none"> ◆ Report furnished within 5 business days
<ul style="list-style-type: none"> ◆ Congressional Acquisition & Assistance Reports 	<ul style="list-style-type: none"> ◆ Reports furnished by deadline established by LPA or within 7 business days of receipt, absent a specific deadline 75% of the time.
<ul style="list-style-type: none"> ◆ Pre-Award Audits 	<ul style="list-style-type: none"> ◆ Pre-award audits performed within 50 business days of request 75% of the time.
<ul style="list-style-type: none"> ◆ Audit & Overhead Advice 	<ul style="list-style-type: none"> ◆ Provide advice within 5 business days of request 75% of the time.
<ul style="list-style-type: none"> ◆ Acquisition & Assistance Closeouts 	<ul style="list-style-type: none"> ◆ Closeouts performed within governing regulation schedules 80% of the time

NOTE

The preceding customer service standards are quantitative in nature and in no way attempts to capture the qualitative measures of the teaming arrangement and participation of all parties in the acquisition process. As clearly noted in the FAR early participation, teaming and accountability are necessary components for a successful acquisitions system. The Office of Procurement, upon the completion of each requirement, will issue a customer service survey that will attempt to capture the qualitative as well as the quantitative metrics necessary to properly evaluate customer service.

***OFFICE OF HUMAN
RESOURCES
(M/HR)***



INTRODUCTION

The USAID Office of Human Resources is one of six components of the Management Bureau for the United States Agency for International Development. The acronym used within the Agency is M/HR.

M/HR consists of the Office of the Director and the following five Divisions:

- 1) Policy, Planning and Information Management Division,
 - 2) Executive Management Staff,
 - 3) Labor and Employee Relations and Performance Management Division
 - 4) Personnel Operations Division
 - 5) Learning Support Division.
- ◆ The primary responsibility of the ***Office of the Director (M/HR/OD)*** is to serve as the Agency's principal advisor regarding Human Resources.
 - ◆ The primary responsibility of the ***Policy, Planning, and Information Management Division (M/HR/PPIM)*** is to maintain the Agency's workforce planning management program, which includes developing and implementing recruitment, retention, and position management packages. The Division also manages and operates personnel management information systems and sub-systems.
 - ◆ The primary responsibility of the ***Executive Management Staff (M/HR/EM)*** is to provide leadership and direction that governs the assignment of employees in the Executive Program. Such employees include Presidential, Schedule C, Administratively Determined, Career and Non-Career Senior Executive and Foreign Service employees assigned to the Senior Management Group.
 - ◆ The primary responsibility of the ***Labor and Employee Relations and Performance Management Division (M/HR/LERPM)*** is to provide leadership, direction, and guidance on labor and employee relations and performance. The Division is responsible for adjudicating grievances presented under the Administrative Grievance Procedures, the Foreign Service Grievance System and the Negotiated Grievance Procedures.
 - ◆ The primary responsibility of the ***Personnel Operations Division (M/HR/POD)*** is to provide leadership, guidance, direction, and oversight for recruitment, appointment, position classification, promotion, and assignment of both Foreign Service and Civil Service; stateside and overseas. The Division oversees the administration of allowances, benefits, i.e., health and life insurance, and leave programs.
 - ◆ Finally, the primary responsibility of the ***Learning Support Division (M/HR/LS)*** is to provide leadership and direction to the continuous development of the worldwide workforce in accomplishment of USAID's global Strategic Goal to remain a premier bilateral development agency. M/HR/LS interprets and implements legislative and executive branch mandates that govern training programs for federal employees; develops policies and regulations that govern learning and staff development programs for all categories of USAID employees, including Foreign Service Nationals, and U.S. Personal service Contractors.

The Office of Human Resource Headquarters is located in Washington, D.C. and consist of 1 Office Director, 1 Deputy, 5 Division Chiefs and an *on board* staff of 67 with a target level of 77. The Washington, D.C. staff includes Civil Service and Foreign Service Direct Hires. The Headquarters also supports Foreign Service Officers in 70 USAID Overseas Missions.

USAID
Management Bureau
Office of Human Resources
Services Provided

Office of the Director (M/HR/OD)

Rose Marie Depp, Director

Policy, Planning, and Information Management Division (M/HR/PPIM)

Patrick L. Brown, Acting Division Chief

- ◆ Publication of HR Policies and Directives
- ◆ Maintenance of HR Website
- ◆ Personnel Policy
- ◆ Maintaining Personnel Data Systems
- ◆ Staffing Pattern and Recurring Reports
- ◆ Interface with NFC
- ◆ HR Statutes, Regulations and Policy Interpretations
- ◆ FAIR Act and OMB A-76 Reporting
- ◆ Internationally-Recruited, OE Funded, Long Term USPSC Approvals
- ◆ Workforce Planning

Executive Management Division (M/HR/EM)

Wayne Tate, Division Chief

- ◆ Processing of Awards
- ◆ Processing SMG Personnel Actions
- ◆ Performance Evaluation Boards
- ◆ Assignments Counseling
- ◆ Processing TSP
- ◆ Handles SMG Assignments
- ◆ Handles Schedule C, AD and Presidential Appointments
- ◆ Processes Performance Bonus/Pay
- ◆ Recommendations for LCEs
- ◆ Emergency Locator System
- ◆ Travel Authorizations
- ◆ Coordinating Job Interviews
- ◆ Difficult To Staff Incentive Differential
- ◆ Processing Allowances
- ◆ SES Vacancies Announced and Filled
- ◆ Input Payroll Data To NFC
- ◆ Processing of 607 (d) Actions
- ◆ Transfers

USAID
Management Bureau
Office of Human Resources
Services Provided

**Labor and Employee Relations and Performance Management Division
(M/HR/LERPM)**

Melissa Prater, Acting Division Chief

- ◆ Collective Bargaining
- ◆ Disciplinary Actions
- ◆ Responding to Union Requests
- ◆ Adjudicating Grievances
- ◆ Processing of Retirements
- ◆ Investigating Alleged Improper Behavior
- ◆ Administering the Performance Management Program
- ◆ Representing the Agency before the Federal Service Grievance Board
- ◆ Representing the Agency before the Federal Mediation and Conciliation Service
- ◆ Representing the Agency before the Federal Labor Relations Authority
- ◆ Making Suitability Determinations
- ◆ Administering Long Term Care Benefits Programs

Personnel Operation Division (M/HR/POD)

Oveta Watkins, Acting Division Chief

- ◆ Appointments
- ◆ Assignments
- ◆ Coordinating Job Interviews
- ◆ CS to FS Appointment Program
- ◆ Difficult to Staff Incentive Differential
- ◆ Drug Free Workplace Program
- ◆ Eldercare/EVT
- ◆ Emergency Locator System
- ◆ Leave Donor Program
- ◆ Personnel Records Management
- ◆ Processing of Allowances
- ◆ Processing of 607 (d) Actions
- ◆ Summer Volunteer Programs
- ◆ Tenuring
- ◆ Transfers
- ◆ Travel Authorizations

USAID
Management Bureau
Office of Human Resources
Services Provided

Personnel Operation Division (M/HR/POD) (continue)

Oveta Watkins, Acting Division Chief

- ◆ Assignments Counseling
- ◆ CS Vacancies Announced and Filled
- ◆ Crisis Counseling
- ◆ Emergency Visitation Travel (EVT) Hardship
- ◆ Enroll Employees in Language, Security and Retirement Training
- ◆ Evacuation
- ◆ FSN Travel Insurance
- ◆ FS Vacancies Announced and Filled
- ◆ Life Insurance Processing
- ◆ New Entry Professional (NEP) Program
- ◆ Performance Counseling
- ◆ Position Classification
- ◆ Presidential Management Intern (PMI) Program
- ◆ Processing Thrift Savings Plan
- ◆ Processing Personnel Actions (Non-SMG)
- ◆ Recruitment Outreach
- ◆ Security Overseas Seminar/Job Search
- ◆ Unemployment Issues
- ◆ Worker's Compensation

Learning Support Division (M/HR/LS)

Toni Mitchell, Acting Division Chief

- ◆ Training Design, Delivery and Evaluation
- ◆ Operate Training Center
- ◆ Operate Employee Training Library
- ◆ HR Budget
- ◆ Maintenance of Training Website
- ◆ Training Certification
- ◆ Training Policy
- ◆ Training Database
- ◆ Training Equipment and Supplies
- ◆ Training Advice and Consultation

USAID
Management Bureau
Office of Human Resources
Quality Service Plan

M/HRPPIM

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Interface with NFC (NFC Support). 	<ul style="list-style-type: none"> ◆ Coordinates with NFC, USAID Users, M/FM, M/IRM and OIG to resolve all connectivity problems before the close. ◆ Establishes NFC Position Master Records within three (3) business days upon receiving HR request.

M/HR/EM

SERVICES OFFERED – Staffing Side:	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Advertise ad hoc SMG open positions. 	<ul style="list-style-type: none"> ◆ Advertise for a minimum 14 business days. Coordinate w/relevant bureaus for appropriate job specs. Gather expressions of interest/bios & setup SMG meetings (review/selection panels).
<ul style="list-style-type: none"> ◆ Advertise SES open positions. 	<ul style="list-style-type: none"> ◆ Advertise for a minimum 14 business days Coordinate the vacancy announcement w/relevant bureaus. Gather/rank applications, setup merit staffing panel & forward results to selection official within <u>3 business days</u> after panel concludes.
<ul style="list-style-type: none"> ◆ Process-in Administratively Determined (AD), PAS and Schedule C employees 	<ul style="list-style-type: none"> ◆ Coordinate w/ES, SEC, GC, & relevant bureaus to identify positions, request clearance-level, schedule briefings, & establish positions in the system, respectively. Process-in period: 7 to 28 business days

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Management Bureau
Office of Human Resources
Quality Service Plan

M/HR/EM (cont.)

◆ Processing of Reassignment Actions	◆ 95% of the time all reassignments are processed within 2 weeks after the effective date of the action
◆ Processing of Promotion Actions	◆ 99% of the time, all promotions are processed within the same pay period as the effective date of the promotion.
◆	
◆	

M/HR/LERPM

SERVICES OFFERED	PERFORMANCE STANDARDS
◆ Processing of Foreign Service Retirements	<ul style="list-style-type: none"> ◆ Preliminary Foreign Service retirement cases are sent to State Department for processing within 21 business days after receipt. ◆ Final documents are sent to State within 5 business days after the date of retirement. ◆ Follow up with State to resolve all inquiries within 3 business days 95% of the time.
◆ Processing of Civil Service Retirements	<ul style="list-style-type: none"> ◆ Preliminary Civil Service retirement cases are sent to OPM for processing within 14 business days after receipt. ◆ Final documents are sent to OPM within 5 business days after the date of retirement.

USAID
Management Bureau
Office of Human Resources
Quality Service Plan

M/HR/POD

SERVICES OFFERED	PERFORMANCE STANDARDS
◆ Processing of New Hire Actions	◆ 90% of the time, all New Hire Actions are processed within 10 business days after the effective date.
◆ Processing of Reassignment Actions	◆ 90% of the time, all reassignment actions are processed within 10 business days after the effective date of the reassignment.
◆ Processing of Promotion Actions	◆ 90% of the time, all promotion actions are processed within 10 business days after the effective date of the promotion.

M/HR/LS

SERVICES OFFERED	PERFORMANCE STANDARDS
◆ Operate Employee Training Center	◆ Notification of receipt of training application within 3 business days of receipt ◆ Room schedule updated daily 99% of the time ◆ Training certificates are issued within 4 business days 99% of the time ◆ 95% of Training Classes rated above Satisfactory

***OFFICE OF THE
CHIEF FINANCIAL
OFFICER (M/CFO)***



INTRODUCTION

The USAID Office of Financial Management is currently one of six components of the Management Bureau for the United States Agency for International Development. The acronym used within the Agency is M/FM. M/FM's worldwide mission is to establish and maintain sound financial management practices, which advance USAID's, mission, goals and objectives. M/FM is responsible for reviewing and approving financial reports and statements prepared by agency components for transmittal to the Administrator, the Office of the Management and Budget (OMB), the President of the United States, the United States Congress, and other external groups. M/FM is made up of the following seven divisions:

- ◆ **Accounting Division (M/FM/A)** is responsible for establishing financial policies and internal accounting controls. The Division provides advice to agency personnel regarding transactions recorded in the AID/W core financial system, Phoenix. FM/A processes, in Phoenix, Advice of Charge documents from the missions, Inter-Agency Reimbursable Agreements, billing documents for a variety of activities, and cash receipts. The AID/W accruals system, ARS, is managed by the Division.
- ◆ **Central Accounting and Reporting Division (M/FM/CAR)** is responsible for: (a) the financial control and reporting of agency accounts; (b) the appropriation at account level, of all foreign assistance funds appropriated for Agency program activities and operating expenses. The Division controls and maintains the Agency's automated on-line systems for administrative control of funds and authorizes the write-off of un-collectible claims within the authority of the Agency.
- ◆ **Cash Management and Payment Division (M/FM/CMP)** maintains the official record of incoming invoices/bills/vouchers and obligations and monitoring and obtaining administrative approval for headquarters vouchers to ensure deliver of goods and/or services. The Division controls and monitors the production of Agency Washington-to-Mission Advice-of-Charge reports and detail listings, processes requests for stop-payment actions throughout the Department of Treasury and provides continuous monitoring and management of cash resources flowing to grantees.
- ◆ **Loan Management Division (M/FM/LM)** manages accounting and reporting activities for USAID's credit programs: Direct Loans Program, Urban and Environment (UE) Credit Program, Micro and Small Enterprise Development (MSED) Program, Israel Loan Guarantee Program, Development Credit Authority (DCA) Program.
- ◆ **Financial Systems Division (M/FM/FS)** is responsible for the Agency's financial systems. In December 2000, USAID/W implemented a new core financial management system, Phoenix. The Phoenix system will eventually be deployed worldwide.
- ◆ **Payroll (M/FM/P)** manages four initiatives: (a) Payroll Processing, (b) Payroll Inquiries, (c) Retirement Processing, and (d) Lump Sum Payments.
- ◆ **The Office of Management Planning and Innovation (M/MPI)** manages the Implementation of the Federal Managers Financial Integrity Act (FMFIA); coordinates the Agency's system for ongoing evaluations; and reports on the adequacy of systems of internal accounting and administrative control. M/MPI manages the Audit Management Program and provides substantive direction to Bureaus and Offices responding to audit recommendations.

The Office of Financial Management Headquarters, is located in Washington, D.C. and consist of 1 Chief Financial Officer (CFO), 1 Agency Controller, 1 Deputy Chief Financial Office, 7 Division Chiefs and a staff of 133 which includes Civil Service, Foreign Service and Contractors. The Headquarters also supports approximately 70 Foreign Service Officers in Controller positions at 50 USAID Overseas Missions.

USAID
Management Bureau
Office of Financial Management
Services Provided

Office of the Chief Financial Office (M/CFO)
Susan Rabern, CFO

Central Accounting and Reporting, M/FM/CAR
David Ostermeyer, Division Chief

- ◆ Manage interagency transfers
- ◆ Provide funds for upward adjustments
- ◆ Recover funds for upward adjustment
- ◆ Recover deobligated funds
- ◆ Request intra-agency apportionments from OMB
- ◆ Produce the Flash Report
- ◆ Produce the 85% report
- ◆ Provide advice to USAID Personnel on how financial processes work
- ◆ Produce annual and quarterly agency financial statements
- ◆ Reconcile Undisbursed Accounts
- ◆ Prepare and Transmit the missions SF-224 reports
- ◆ Reconcile the Agency's Payroll to NFC's SF-224 report
- ◆ Prepare the Treasury Report on Receivables
- ◆ Participate in Cross Servicing program at Treasury FMS
- ◆ Maintain Ledgers for foreign currencies
- ◆ Reconcile USAID ledgers and Treasury Funds balances
- ◆ Maintain and generate the SF-6653
- ◆ Responsible for all bank transactions
- ◆ Process checks and cash received by AID/W
- ◆ Responsible for retiring files for FM/CAR
- ◆ Maintain the MACS Auxiliary Ledger (MAL)

USAID
Management Bureau
Office of Financial Management
Services Provided

Accounting Division M/FM/A

Jeffrey Carr, Division Chief

- ◆ Record Previously unrecorded obligations and upward adjustments
- ◆ Prepare, issue, follow-up and record bills for collection
- ◆ Record application of collections to obligations
- ◆ Record incoming reimbursable agreements
- ◆ Manage the quarterly accrual exercise
- ◆ Perform account reconciliation, analysis and research
- ◆ Coordinate 1311 review

Cash Management and Payments Division, M/FM/CMP

Cathy Collins, Division Chief

- ◆ Review and Certify Payments to contractors
- ◆ Process Bi-weekly PSC payroll
- ◆ Process periodic advances for grants
- ◆ Payment of Citibank tickets, travel advances, travel vouchers, purchase cards, etc.
- ◆ Assign unique Phoenix/MACS tracking number to vouchers
- ◆ Send vouchers for CTO administrative approval

Loan Management Division, M/FM/LM

Eirdis Davis, Division Chief

- ◆ Create and distribute USAID;s monthly Loan Delinquency Report
- ◆ Perform loan account reconciliation
- ◆ Perform scheduling and debt reductions
- ◆ Respond to loan information inquiries
- ◆ Monitor collections received for USAID credit programs
- ◆ Prepare documents for miscellaneous collections
- ◆ Coordinate credit program estimates for President's Budget
- ◆ Calculate credit reform interest income
- ◆ Calculate LPG subsidy expense
- ◆ Prepare US Treasury reports, FACTS I, FACTS II and Report on Receivables (TROR)
- ◆ Calculate liquidating account excess capital transfers (SF-1151s)
- ◆ Maintain credit program

USAID
Management Bureau
Office of Financial Management
Services Provided

Payroll Division, M/FM/P

Angela Burkard, Division Chief

- ◆ Process requested Payroll related actions
- ◆ Manage the NFCPAY inquiry mailbox
- ◆ Perform leave and salary audits
- ◆ Send retirement/separation information to NFC for lump-sum payment

Management, Planning and Innovation, M/MPI

Connie Turner, Division Chief

- ◆ Coordinate annual FMFIA review
- ◆ Develop and ensure distribution of Risk Assessment guidance/checklists
- ◆ Develop and ensure distribution of FMFIA guidance/checklists
- ◆ Support Agency Management Control and Review Committee (MCRC)
- ◆ Provide effective liaison between Agency management and the OIG
- ◆ Manage the Consolidated Audit Tracking System (CATS) jointly with the OIG
- ◆ Develop ADS chapters related to financial management
- ◆ Coordinate training related to financial management
- ◆ Update, communicate Phoenix procedures
- ◆ Coordinate the preparation of the Accountability Report
- ◆ Oversee USAID Federal Advisory Committees
- ◆ Respond to inquiries on Financial Management

Financial System Division, M/FM/FS

David Noble, Acting Division Chief

- ◆ Provide financial information for Agency resource management and decision-making
- ◆ Provide financial system security assurance
- ◆ Continuous improvements of financial processes
- ◆ Ensure financial systems compliance
- ◆ Provide communications and briefings on financial system availability
- ◆ Design effective financial system training programs

USAID
Management Bureau
Office of Financial Management
Quality Service Plan

M/FM/A

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Prepare, issue, follow-up and record Bills for Collection. Coordinate with M/OP or M/MPI as required. 	<ul style="list-style-type: none"> ◆ Bills are issued within 2 days of request. Follow-up efforts are done after 30 days.
<ul style="list-style-type: none"> ◆ Record incoming reimbursable agreements and collections (notify PPC/B, FM/CAR/Funds Control, and the Bureau on each transaction.) 	<ul style="list-style-type: none"> ◆ After receipt of reimbursable agreement from the relevant bureau with all the required information, agreement is recorded within 2 days.
<ul style="list-style-type: none"> ◆ Manage the quarterly accrual exercise and provide guidance and assistance to bureaus/offices during the accrual process. 	<ul style="list-style-type: none"> ◆ Provide guidance to operating units at least 4 weeks prior to the accrual submission begin date. E-mail, phone, and walk-in inquiries are responded/acknowledged within 2 days.

M/FM/CAR

SERVICE OFFERED	PERFORMANCE STANDARD
<ul style="list-style-type: none"> ◆ Manages interagency transfers: (1) Clear Memorandums of Agreement, all appropriations and (2) Process requests to OMB and Treasury for apportionments, direct apportionments and related 1151 forms. 	<ul style="list-style-type: none"> ◆ Clearance of Memorandums will be done within 1 day. ◆ Process requests to OMB and Treasury will be done within 2 days.
<ul style="list-style-type: none"> ◆ Recovery of deobligated funds from prior years' appropriations. 	<ul style="list-style-type: none"> ◆ Prior year deobligations recycled by the end of the first quarter of the subsequent year.

USAID
Management Bureau
Office of Financial Management
Quality Service Plan

M/FM/CMP

SERVICE OFFERED	PERFORMANCE STANDARD
<ul style="list-style-type: none"> ◆ Review and certify payments to contractors, vendors and grantees, etc. via Phoenix. 	<ul style="list-style-type: none"> ◆ Payment date is within 30 days of receipt of voucher.
<ul style="list-style-type: none"> ◆ Reconcile the DHHS expenditures with USAID G/L, log LOC grants received from M/OP, Grant Officers or Controllers. 	<ul style="list-style-type: none"> ◆ Reconciliation is an on-going process and is performed daily. The LOC Grants Tracking Register is updated within 3 days from receipt of the documents.
<ul style="list-style-type: none"> ◆ Perform IPAC voucher examination, resolve billing errors and send copies of vouchers to COTRs for Administrative Approvals. 	<ul style="list-style-type: none"> ◆ Voucher examination is done within 5 days and the Administrative Approval cycle is 15 days. Billing errors should be resolved within 4 days.

M/FM/LM

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Create and distribute USAID's monthly Loan Delinquency Report. 	<ul style="list-style-type: none"> ◆ Reports are made available to the Development Credit Staff (EGAT/DC) and others, within 5 days after the end of the month.
<ul style="list-style-type: none"> ◆ Maintain credit program GL and monitor Riggs Bank GL interface posting. 	<ul style="list-style-type: none"> ◆ Monthly GL interface file posted to Phoenix, and FM/CAR notified, within 3 days after receipt of the file from Riggs Bank.

<ul style="list-style-type: none">◆ Perform rescheduling and debt reductions	<ul style="list-style-type: none">◆ Develop rescheduling plan when bilateral agreement is signed. Provide Riggs Bank with completed transaction package within 5 days of date specified.
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USAID
Management Bureau
Office of Financial Management
Quality Service Plan

M/FM/FS

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Provide timely, consistent, reliable, and useful financial information, for Agency resource management and decision-making. Exchange of financial information among internal customers and with external stakeholders, partners and vendors. 	<ul style="list-style-type: none"> ◆ Mission financial data is available to USAID/W managers within 15 days after the close of each month. Washington financial data is available for reporting using the Phoenix reporting database within one business day.
<ul style="list-style-type: none"> ◆ Provide financial system security assurance, administration, and support services. 	<ul style="list-style-type: none"> ◆ User problem reports will be closed within 10 days from receipt. ◆ Remedy tickets will be closed within one month.
<ul style="list-style-type: none"> ◆ Continuous improvements of financial processes to ensure that the Agency is able to efficiently and effectively achieve its mission, goals, and objectives. 	<ul style="list-style-type: none"> ◆ Availability of Phoenix production software from 0800 through 1800 hours Monday through Friday. Weekend availability within acceptable pre-arranged times.

M/FM/P

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Manage the NFCPAY inquiry mailbox. 	<p>Track all emails, phone calls, and visits from agency employees with questions regarding their pay to ensure that issues are resolved The goal is that 75% payroll inquiries are resolved to the employee's satisfaction 1 pay period and 98% within two pay periods</p>
<ul style="list-style-type: none"> ◆ For those retiring or separating from the agency, forward the necessary information to NFC where lump sum payment is processed. 	<ul style="list-style-type: none"> ◆ Lump Sum Payments are made within 30 days of separation.

USAID
Management Bureau
Office of Financial Management
Quality Service Plan

M/MPI

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Coordinate annual FMFIA Review. 	<ul style="list-style-type: none"> ◆ Prepare the necessary documentation for the review and ensure that the review takes place and decisions are documented.
<ul style="list-style-type: none"> ◆ Provide effective liaison between Agency management and the OIG and manage Agency audit recommendations: track, monitor and close all audit recommendations. 	<ul style="list-style-type: none"> ◆ Close audit recommendations within one week of receipt of acceptable documentation.
<ul style="list-style-type: none"> ◆ Develop ADS Chapters related to financial management, management controls, audit management and advisory committees. 	<ul style="list-style-type: none"> ◆ Develop and update ADS chapters as necessary, ensuring compliance with OMB and other requirements.

OFFICE OF OVERSEAS MANAGEMENT SUPPORT (M/OOMS)



INTRODUCTION

The Office of Overseas Management Support is a staff office of the Management Bureau of USAID. The acronym used within the Agency is M/OMS.

- ◆ The primary responsibility of *Overseas Management Support (M/OMS)* is to support and enable the management of field missions and to establish standards, policies, and procedures for all overseas administrative management functions overseas. As part of this responsibility, M/OMS is responsible for the proper management of real property holdings overseas and the general oversight of non-expendable property overseas.
- ◆ M/OMS provides guidance, advice, and support on the establishment and implementation of enhanced administrative systems and the use of overseas administrative resources.
- ◆ M/OMS provides guidance, advice, and support in the implementation and management of USAID's participation in the International Cooperative Administrative Support services (ICASS) program of the Department of State and other USG agencies overseas.
- ◆ M/OMS works collaboratively with other organizations, including the Department of State. Within USAID, M/OMS works closely with Executive Officers and their staff. Executive Offices provide USAID missions with administrative and logistical support in the functional areas of human resources, procurement, financial management, facilities management, operational management, unit security supervision, property asset management, and technology.

The Office of Overseas Management Support Headquarters is located in Washington, D.C. and consists of 1 Office Director and a staff of 11. The Headquarters supports 63 Foreign Service Executive Officers and 25 Personal Service Contractors in over 60 USAID Overseas Missions.

USAID
Management Bureau
Office of Overseas Management Support
Services Provided

Office of the Director (M/OMS)

Stephen Callahan, Acting Director

- ◆ Advice on management and management-related policies and procedures
- ◆ Act as liaison between the missions and public or private entities
- ◆ Identify EXOs for short-term TDYs (including MGT Assessments)
- ◆ Publish the EXONET
- ◆ Maintain the EXO Toolbox
- ◆ Publish the Posts Summary
- ◆ Field site visits (MGT Assessment)
- ◆ Provide oversight of automated systems in support of management functions
- ◆ GSO Training
- ◆ Real Property Training
- ◆ Process Residential furniture orders
- ◆ Process representational orders
- ◆ Resolve order problems for missions
- ◆ Follow-up on payments issues
- ◆ Evaluate/Approve requests to lease residential property greater than \$25K
- ◆ Evaluate/Approve all requests to lease functional space
- ◆ Evaluate/Approve waivers to exceed \$ limit on make-ready
- ◆ Evaluate/Approve residences w/swimming pools
- ◆ Evaluate/Approve off-shore lease payments
- ◆ Evaluate/Approve requests to exceed space allocation
- ◆ Evaluate/Approve plans and construction designs for office additions
- ◆ Evaluate/Approve restoration plans for owned real property
- ◆ Evaluate/Approve request to purchase property
- ◆ Evaluate/Approve space design/utilization plan
- ◆ Evaluate disposition of real property
- ◆ Evaluate/Approve construction drawings for new office building
- ◆ Evaluate/Approve mission housing profiles
- ◆ Evaluate/Approve requests for donation, project contribution, Grant-In- Aid
- ◆ Evaluate/Approve standardization plan
- ◆ Maintain and certify OMS ADS chapters
- ◆ Comment/Clear on all draft updates/reviews of ADS authored by bureaus
- ◆ Respond to recommendations by IG/Risk Assessment/MCR (Mgt. Control Review)
- ◆ Provide oversight and policy guidance to the field on all ICASS issues

USAID
Management Bureau
Office of Overseas Management Support
Quality Service Plan

REGIONAL EXECUTIVE OFFICER

SERVICES OFFERED	PERFORMANCE STANDARDS
◆ Policies and Procedures	◆ Provide advice to missions upon request <u>within 3 business days</u> (includes research and final product)
◆ Liaison between the missions and public or private entities	◆ Make necessary contacts <u>within 3 business days</u> , providing updates as necessary
◆ EXONET and EXO Toolbox and Posts Summary	◆ Edit and publish EXONET and update Toolbox by the 10 th of each month and the Posts Summary monthly
◆ ICASS Policies, Regulations, and Strategies	◆ Provide advice and/or assistance within 5 business days
◆ GSO Training	◆ Organize and facilitate training twice a year
◆ Short-term TDYs and Management Assessments	◆ Perform field site visits as needed and requested by missions, and as resources permit

PERSONAL AND REAL PROPERTY

SERVICES OFFERED	PERFORMANCE STANDARDS
◆ Project Contributions, Grant-in-Aids, Donations	◆ Evaluate/Approve requests <u>within 2 business days</u>
◆ Standardization Plans	◆ Evaluate/Approve requests <u>within 2 business days</u>

USAID
Management Bureau
Office of Overseas Management Support
Quality Service Plan

PERSONAL AND REAL PROPERTY (cont.)

SERVICES OFFERED	PERFORMANCE STANDARDS
◆ Residential Property	◆ Evaluate/Approve requests to lease over \$25,000, to exceed \$ limit on make-ready, to make off-shore lease payments, to exceed space allocation, <u>within 3 business days</u> . Evaluate/Approve housing profiles <u>within 2 weeks</u> .
◆ Functional Space	◆ Evaluate/Approve requests to lease, to exceed space allocation. Evaluate/Approve plans and construction for office additions, restoration plans for owned property, space/design utilization plans, <u>within 5 business days</u>
◆ Owned Property	◆ Evaluate/Approve requests to purchase property, dispose of property, construction drawings for new office buildings <u>within 14 business days</u>

PROCUREMENT

◆ Residential Furniture and Representational Items	◆ Process orders after receipt of all required documents and give a copy of the order to the requestor <u>within 5 to 10 business days</u> , depending on time of year ◆ Respond to queries within 2 business days
◆ Order Problems and Payments Issues	◆ Act as liaison between missions and vendors to resolve problems <u>within 3 business days</u>
◆ Open Market Procurement (not GSA)	◆ Provide quotes <u>within 2 business days</u> after receipt of request; provide proposals in 14 business days; issue POs within <u>3 business days</u>

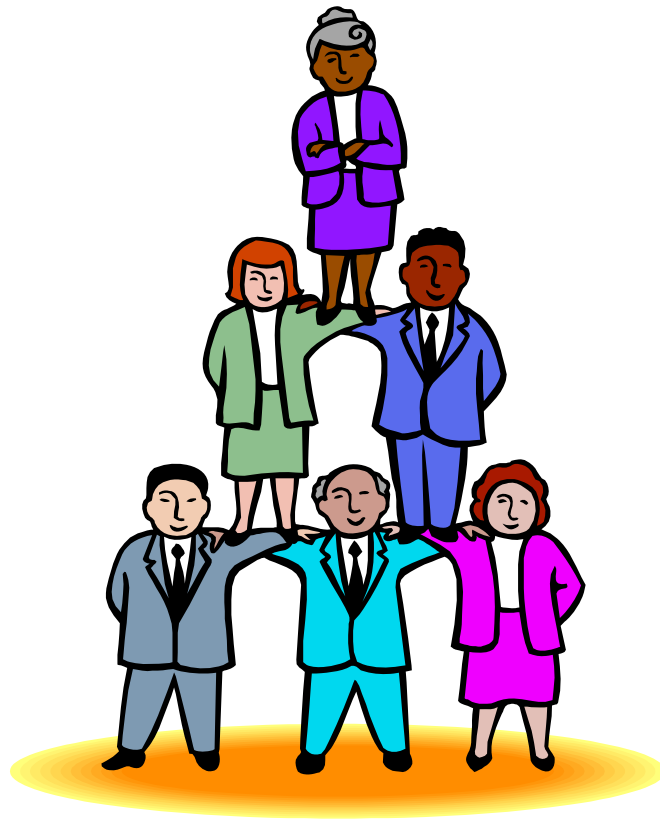
USAID
Management Bureau
Office of Overseas Management Support
Quality Service Plan

POLICY

SERVICES OFFERED	PERFORMANCE STANDARDS
◆ Policies and Regulations	◆ Clarify and/or provide advice <u>within 3 business days</u>
◆ ADS chapters	◆ Maintain/certify OMS chapters and review/clear chapters authored by other bureaus and offices <u>within 5 to 15 business</u> depending on the complexity of the chapter
◆ M/OMS Risk Assessment/Management Control Review/IG Recommendations	◆ Conduct assessments <u>within 5 business days</u> ◆ Coordinate OMS responses <u>within 10 business days</u>

NOTE: All Performance Standards are based on the condition that requests are received in M/OMS complete and fully documented

OFFICE OF ADMINISTRATIVE SERVICES (M/AS)



INTRODUCTION

The Office of Administrative Services (M/AS) is currently one of six components of the Management Bureau for the United States Agency for International Development.

M/AS consists of the Office of the Director and three Divisions:

- 1) Consolidation and Property
 - 2) Travel and Transportation
 - 3) Information and Records
- ◆ The major responsibilities of the ***Office of the Director (M/AS/OD)*** are to establish policies, standards, and guidelines for USAID/W administrative and logistical support services. The Office Director serves as the Agency's environmental executive and as the Freedom of Information Act and Privacy Act Appeal Officer. M/AS/OD administers the occupational safety, environmental health, emergency preparedness, recycling, and parking programs. This Office also develops and directs the Agency's general administrative support services budget.
 - ◆ The major responsibilities of the ***Consolidation and Property Division (M/AS/CPD)*** are to provide building services for the RRB and project coordination for construction, space management and design relocation activities, as well as to manage the motor pool, Metrocheck distribution, mail distribution, and printing.
 - ◆ The major responsibilities of the ***Travel and Transportation Division (M/AS/TT)*** are to establish travel policies, oversee the issuance of visas and passports and travel reservations, coordinate transportation of personal and household effects for overseas assignments, issue travel authorizations for USAID/W funded employees, and adjudicate claims for losses under the Military Personnel and Civilian Employees Claims Act.
 - ◆ The major responsibilities of the ***Information and Records Division (M/AS/IRD)*** are the oversight of the Agency's Records Management Program, Freedom of Information Act (FOIA) and Privacy Act (PA) Programs, Forms Management and Information Collection Programs, and the Agency's Directives System (ADS) Program.

The Office of Administrative Services is located in Washington, D.C. and consist of 1 Office Director, 3 Division Chiefs and a staff of 34. The Washington, D.C. staff includes both Foreign Service and Civil Service Direct Hires and Contractors.

USAID
Management Bureau
Office of Administrative Services
Services Provided

Office of the Director (M/AS/ OD)

Roberto Miranda, Director

- ◆ Continuity of Operations Plan (COOP)
- ◆ Occupant Emergency Plan (OEP)
- ◆ Domestic Safety and Health management
- ◆ RRB Parking Program

Consolidated, Property, and Services Division (M/AS/CPD)

Paul Booze, Division Chief

- ◆ Building repair/maintenance oversight with GSA
- ◆ Shuttle services to State and ad hoc transportation requests
- ◆ Sign Language Interpreter Services
- ◆ Bulk paper procurement and distribution
- ◆ Warehouse management
- ◆ Disposal of surplus property
- ◆ Manpower and contract labor services
- ◆ Furniture acquisition and installation
- ◆ Conference rooms scheduling
- ◆ Signage/way finding system
- ◆ Systems furniture
- ◆ Key and lock service
- ◆ Office relocations
- ◆ Printing & graphic arts services
- ◆ Copier services
- ◆ Transit Benefit Program
- ◆ Mail Room and Courier services
- ◆ Shipping & receiving
- ◆ GPO Program
- ◆ Space designs
- ◆ Galley services

USAID
Management Bureau
Office of Administrative Services
Services Provided

Travel and Transportation Division (M/AS/TT)

Shirl E. Hendley, Division Chief

- ◆ Manage Travel Management Center (SATO), which provides:
 - Passports
 - Visas
 - Airline ticketing and reservations
 - Reservations for hotel, train, car rental
- ◆ Obligate Travel Authorizations
- ◆ Counsel employees shipping goods overseas
- ◆ Arrange transportation of HHE, UAB, consumables and POVs
- ◆ Provide Travel Policy guidance
- ◆ Process claims under the Military Personnel/Civilian Employees' Claims Act
- ◆ Provide payment for long term storage for overseas assignments
- ◆ Travel Manager support and administration
- ◆ USAID Travel website <http://inside.usaid.gov/M/AS/TT/>

Information and Records Division (M/AS/IRD)

Joanne Paskar, Division Chief

- ◆ Records Management (paper, audiovisual, electronic, and database/website records)
 - Training of records personnel
 - Advice on organizing records
 - Advice on retiring records, databases, and websites
 - Boxes for retiring records to the National Archives
 - Transmittal of records to the National Archives
 - Limited help in organizing and retiring records
 - Off-site storage of official records
 - Scanning of Strategic Objective and permanent records
 - Management of the Agency's Vital Records Program
 - Agency policies and procedures
 - Records Management website <http://cdie.usaid.gov/ird>
- ◆ Freedom of Information Act (FOIA) and Privacy Act (PA)
 - Agency central processing point for FOIA/PA requests
 - Agency policies and procedures
 - USAID Handbook for the Public on Obtaining USAID Information
 - Agency's FOIA website <http://www.usaid.gov/about/FOIA>

USAID
Management Bureau
Office of Administrative Services
Services Provided

Information and Records Division (M/AS/IRD) (continue)

Joanne Paskar, Division Chief

- ◆ Forms Management and Information Collection Activities
 - Advice on developing forms
 - Assistance in creating electronic forms (in partnership with M/IRM)
 - Posting forms on USAID Forms website (in partnership with M/IRM)
 - Clearances from OMB for information collection forms
 - Agency policies and procedures

- ◆ Automated Directives System (ADS)
 - Questions about writing and clearing ADS chapters and notices
 - Questions about searching for ADS information and notices
 - Training on writing and finding ADS and notices information
 - Policy on issuing ADS chapters and notices
 - ADS website <http://inside.usaid.gov/ADS>
 - Notice website http://inside.usaid.gov/index_notices.html

- ◆ Other Services
 - Declassification of historical records
 - Transmittal of Federal Register Notices
 - Microfiche equipment maintenance agreements

USAID
Management Bureau
Office of Administrative Services
Quality Service Plan

M/AS/OD

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Manage, direct and serve as the Agency’s principal advisor regarding the Agency’s implementation of programs through service and commodity acquisitions and assistance. 	<ul style="list-style-type: none"> ◆ Achieve a 60 point increase on customer service satisfaction survey conducted on an annual basis by the Administrator.

M/AS/CPD

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Enroll USAID employees into the Transit SmartBenefit Program 	<ul style="list-style-type: none"> ◆ Applications are processed within 2 business days
<ul style="list-style-type: none"> ◆ Manage and oversee moving services within and outside of the RRB 	<ul style="list-style-type: none"> ◆ Requests for moving services are processed within 7 business days
<ul style="list-style-type: none"> ◆ Provide maintenance services to USAID/RRB (Serves as the liaison with GSA) 	<ul style="list-style-type: none"> ◆ Calls placed within 1 business day to GSA
<ul style="list-style-type: none"> ◆ Replacement of ceiling lights ◆ Adjustment of temperature ◆ Request for trash pick-up ◆ Chemical Smells ◆ Shampooing of carpet ◆ Air quality control 	<ul style="list-style-type: none"> ◆ Requests will be completed within 1 business day after notification via email or phone
<ul style="list-style-type: none"> ◆ Schedule conference rooms for meeting and conferences 	<ul style="list-style-type: none"> ◆ Requests for Conference rooms are processed within 2 business days

USAID
Management Bureau
Office of Administrative Services
Quality Service Plan

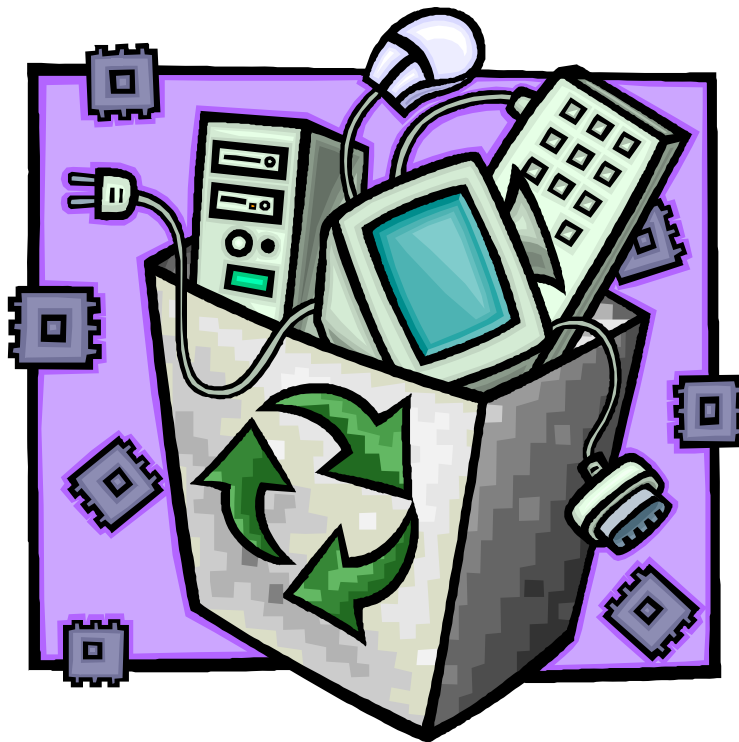
M/AS/TT

SERVICES OFFERED	PERFORMANCE STANDARDS
◆ Travel Authorizations	◆ Travel Authorizations are processed within 3 business days after receipt (time and date stamped) of the TA and other required documents.
◆ Passports	◆ Passport Applications are reviewed, processed, and available to the traveler within 5 business days.
◆ Visas	◆ Visa applications are reviewed, processed and available to the traveler within 5 business days.

M/AS/IRD

SERVICES OFFERED	PERFORMANCE STANDARDS
◆ Records Management Policies and Procedures	◆ Responds to customer requests within 2 business days. Provides an interim response in 2 business days if research or consultations with other entities/experts are required.
◆ FOIA/PA	◆ Acknowledges FOIA/PA requests within 2 business days
◆ Vital Records Guidance	◆ Responds to customer requests within 2 business days. Provides an interim response in 2 business days if research or consultations with other entities/experts are required.

***OFFICE OF INFORMATION
RESOURCE MANAGEMENT
(M/IRM)***



INTRODUCTION

The USAID Office of Information Resources Management is one of six components of the Management Bureau for the United States Agency for International Development. The acronym used within the Agency is M/IRM.

M/IRM consists of the Office of the Director and the following five Divisions:

- 1) Consulting and Information Services Division,
 - 2) Information Policy and Administration Division,
 - 3) Planning, Management & Acquisition Division
 - 4) Systems Development & Maintenance Division,
 - 5) Telecommunications and Computer Operations Division.
- ◆ The primary responsibility of the ***Office of the Director (M/IRM/OD)*** is to serve as the Agency's principal advisor regarding Information Resources.
 - ◆ The primary responsibility of the ***Consulting and Information Services Division (M/IRM/CIS)*** is to provide information management consulting services and integrate them with information technology at the Agency, organization and individual staff levels.
 - ◆ The primary responsibility of the ***Information Policy and Administration Division (M/IRM/IPA)*** is to formulate strategic information technology policies and plans for the Agency's automated information activities. The Division also oversees the information system security program.
 - ◆ The primary responsibility of the ***Planning, Management, and Acquisition Division (M/IRM/PMA)*** is to provide support to the Chief Information Officer (CIO) in developing and implementing the Agency's Enterprise Architecture, manage the Information Technology budget, coordinate the acquisition of Federal Information Processing resources with other M Bureau entities, provide core contract administration services, and provide policy coordination related to computer accessibility for disabled employees.
 - ◆ The primary responsibility of the ***Systems Development and Maintenance Division (M/IRM/SDM)*** is to direct the development and maintenance of corporate information systems. The Division also designs, develops, programs, and implements automated information management systems, as well as, manages designs, and maintains the Agency's database software.
 - ◆ Finally, the primary responsibility of the ***Telecommunications and Computer Operations Division (M/IRM/TCO)*** is to manage all Agency information technology infrastructures in AID/W and to develop and disseminate standards and provide technical assistance to overseas offices on all information technology infrastructures. Infrastructure areas supported include: IRM help desk, voice communication operations, data and voice connectivity between the USAID Overseas Missions and Washington, local area networks, electronic mail services, desktop platforms, IT security operations, telegram distribution, and connectivity to external services such as Internet.

The Office of Information Resources Management Headquarters is located in Washington, D.C. and consist of 1 Office Director, 1 Deputy, 5 Division Chiefs and a staff of 300. The Washington, D.C. staff includes Civil Service employees and Contractors.

USAID
Management Bureau
Office of Information Resources Management
Services Provided

Office of the Director (M/IRM/ OD)

John Streufert, Director

- ◆ Information Security Systems Office
- ◆ IT Security Training
- ◆ IT Security Policies and Procedures development and support

Consulting and Information Services Division (M/IRM/CIS)

Bernard Mazer, Division Chief

- ◆ Internet, Intranet and Extranet support
- ◆ IT support for program-funded activities

Information Policy and Administration Division (M/IRM/IPA)

Joe Gueron, Division Chief

- ◆ Distance Learning support
- ◆ Knowledge Management support
- ◆ Liaison with Dept. of State on communication issues

Planning, Management, and Acquisition Division (M/IRM/PMA)

Patricia Kristobek, Division Chief

- ◆ IT Support Budget support for Agency
- ◆ Procurement support for IT simplified acquisitions
- ◆ Assess IT Architecture compliance

Systems Development and Maintenance Division (M/IRM/SDM)

Paul Eavy, Division Chief

- ◆ Support and maintenance for the following systems applications:
 - MACS (Mission Accounting Control System)
 - AETA (American Employee Time and Attendance)
 - NMS/A&A (New Management System/Acquisition and Assistance)
 - TACS (Time and Attendance Conversion for NFC)
 - Locator
 - AFTERS (Agency Full Time Equivalence Reporting System)
 - FS Assignment System
 - Biographic Register
 - MAILS (Mail Address Integrated Listing System)
 - LARS (Legacy Action Request)
 - MMVIS (Mission Motor Vehicle Inventory)
 - FDTs (Financial Disclosure Tracking System)
 - EDR (Employee Data Record)
 - Exact (Executive Action Tracking)

USAID
Management Bureau
Office of Information Resources Management
Services Provided

Telecommunications and Computer Operations Division (M/IRM/TCO)

Gretchen Larrimer, Division Chief

- ◆ Installation and support for communications infrastructure IT components such as:
 - Data connections between USAID buildings and missions and within the RRB
 - VSAT communications
 - Voice over IP
 - Video conferencing
 - Local Area networks
 - Dial-in to network services
- ◆ Installation and support for:
 - PCs
 - Servers
 - Printers
 - Phones
 - Faxes
 - IT desktop software/ hardware
 - Cell phones
 - Pagers
 - Virus protection software
- ◆ Management of centralized IRM Helpdesk for new requests and IT assistance calls
- ◆ Procurement technical assistance for IT items
- ◆ IT assessment of USAID missions IT Operations
- ◆ Management of AID/W Cable distribution and retrieval system
- ◆ Management of USAID electronic mail systems
- ◆ Management and storage of customer data stored on network servers.

USAID
Management Bureau
Office of Information Resource Management
Quality Service Plan

M/IRM/OD

SERVICE OFFERED	PERFORMANCE STANDARD
<ul style="list-style-type: none"> ◆ Manage, direct and serve as the Agency’s principal advisor regarding the Agency’s implementation of programs through service and commodity acquisitions and assistance. 	<ul style="list-style-type: none"> ◆ Achieve a 40 point increase on customer service satisfaction survey conducted on an annual basis by the Administrator.

M/IRM/CIS

SERVICE OFFERED	PERFORMANCE STANDARD
<ul style="list-style-type: none"> ◆ Internet, Intranet and Extranet support 	<ul style="list-style-type: none"> ◆ Any anomalies identified in web developed products will be corrected within 3 business days. ◆ Any misdirected links or misdirected menu items will be resolved within 1 business day.
<ul style="list-style-type: none"> ◆ Program Information Technology Review 	<ul style="list-style-type: none"> ◆ Customer contacted by analyst within 1 business day of being assigned a review. ◆ Within 1 business day of being assigned, the analyst will scope the review, define the review budget, propose an overall review plan, and obtain formal customer acceptance of the plan.

USAID
Management Bureau
Office of Information Resource Management
Quality Service Plan

M/IRM/IPA

SERVICE OFFERED	PERFORMANCE STANDARD
<ul style="list-style-type: none"> ◆ Coordinate IRM responses to USAID and outside organization information requests and audit reports on information technology and represent IRM on interagency technical working groups. 	<ul style="list-style-type: none"> ◆ 95% of the actions are closed within scheduled timeframes as agreed by audit office and IRM
<ul style="list-style-type: none"> ◆ Support the BTEC and the Agency’s business transformation process (i.e. Mission Software Standardization, President's Management Agenda, BTEC website development and maintenance, etc.) 	<ul style="list-style-type: none"> ◆ Complete changes to the BTEC website in less than 2 business days 95% of the time ◆ Respond to BTEC user technical requests within 3 business days 95% of the time ◆ Provide BTEC website usage statistics to management by the 5th business day of each month
<ul style="list-style-type: none"> ◆ Championing the use of information technology tools to improve Knowledge Management and Knowledge sharing within USAID (i.e. Collaboration tools, Conferences, Chats, Communities of Interest, Electronic Commerce, KM website development and maintenance, etc.) 	<ul style="list-style-type: none"> ◆ Collaborate in the development and maintenance of an Agency-wide knowledge management website and complete changes in less than 2 business days 95% of the time ◆ Respond to KM user technical requests within 3 business days 95% of the time ◆ Provide KM website usage statistics to management by the 5th business day of each month

USAID
Management Bureau
Office of Information Resource Management
Quality Service Plan

M/IRM/PMA

SERVICE OFFERED	PERFORMANCE STANDARD
<ul style="list-style-type: none"> ◆ IT budget support for the Agency 	<ul style="list-style-type: none"> ◆ Ensure complete and timely obligation of 90% approved IT funds by September 1st of each fiscal year
<ul style="list-style-type: none"> ◆ Procurement support for IT simplified acquisitions 	<ul style="list-style-type: none"> ◆ Return phone calls and e-mails within 2 business days and task completed within the following business days : <ul style="list-style-type: none"> ◆ Administrative Modifications-31 ◆ FSS Delivery Orders- 28 ◆ Inter-Agency Agreements-90 ◆ Inter-Agency Modifications-74 ◆ Purchase Orders-69 ◆ Task Orders-64 ◆ Bilateral Modifications-85

M/IRM/SDM

SERVICE OFFERED	PERFORMANCE STANDARD
<ul style="list-style-type: none"> ◆ Support for corporate applications, such as, NMS, Phoenix, Exact, AETA, and MACS. 	<ul style="list-style-type: none"> ◆ Major corporate applications are available 98% of the time from 7:00 AM to 6:00 PM, Monday – Friday ◆ Agency staff are notified of scheduled downtime for major corporate applications 2 business days in advance of downtime unless emergency updates are required ◆ Respond to requests for support for corporate application performance within 1 business day ◆ Respond to requests for changes to corporate applications within 4 business days of receipt of official request.

USAID
Management Bureau
Office of Information Resource Management
Quality Service Plan

M/IRM/TCO

SERVICES OFFERED	PERFORMANCE STANDARDS
<ul style="list-style-type: none"> ◆ Daily infrastructure services of Email, Internet/Intranet, telephone, office automation products, PCs, data storage of customer files, and cables. 	<ul style="list-style-type: none"> ◆ Infrastructure services are to be available 98% of the time from 7:00 AM to 6:00 PM, Monday – Friday, except holidays. ◆ Agency staff are notified of scheduled downtime for major corporate infrastructure services 2 business days in advance of downtime unless emergency updates are required ◆ Respond to requests for changes among offered products and services within 1 business day after receipt of official request ◆ Resolve request for changes among offered products and services within 5 business days 95% of the time ◆ Respond to requests for assistance on existing services within 1 business day of receipt of request.

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