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Acquisition & Assistance Policy Directive (AAPD)

From the Director, Office of Acquisition & Assistance Issued: JUNE 23, 2006

AAPD 06-08

AIDAR, APPENDICES D AND J: USING THE OPTIONAL SCHEDULE TO INCREMENTALLY FUND CONTRACTS

Subject Category: PERSONAL SERVICES CONTRACTS
Type: Policy

AAPDs provide information of significance to all agency personnel and partners involved in the Acquisition and Assistance process. Information includes (but is not limited to): advance notification of changes in acquisition or assistance regulations; reminders; procedures; and general information. Also, AAPDs may be used to implement new requirements on short-notice, pending formal amendment of acquisition or assistance regulations.

AAPDs are EFFECTIVE AS OF THE ISSUED DATE unless otherwise noted in the guidance below; the directives remain in effect until this office issues a notice of cancellation.

This AAPD: Is New Replaces

Applicable to:

Existing awards; Modification required

- No later than
- As noted in guidance below
- RFPs/RFAs issued on or after the effective date of this AAPD; all other Pending Awards, i.e., 8(a), sole source, IQC
- Other or N/A

Precedes change to:

- APPENDICES D AND J
- USAID Automated Directives System (ADS) Chapter
- Code of Federal Regulations
- Other
- No change to regulations

(signature on file)
Michael F. Walsh

PURPOSE: The purpose of this AAPD is to change Appendices D and J to allow the use of the Optional Schedules for incrementally funding personal services contracts, regardless of funding source.

BACKGROUND: Currently, Appendices D and J of the AIDAR restrict the use of the Optional Schedules to only operating expense (OE) funded contracts. This AAPD changes the language of Appendices D and J to allow for the use of the Optional Schedule for all PSC contracts, regardless of funding source, i.e., operating expense(OE), program funds, trust funds, etc.

GUIDANCE: Appendices D and J are changed as follows:

Appendix D, Section 11, Optional Schedule With a U.S. Citizen or U.S. Resident Alien Contract No. _____, the first paragraph under Table of Contents, (Optional Schedule) is changed as follows:

(Use of the Optional Schedule is not mandatory. It is intended to serve as an alternate procedure for funding U.S. PSCs or U.S. Resident Alien PSCs, regardless of the fund source. The Schedule is for use when the Contracting Officer anticipates the contract will be incrementally funded.)

Appendix J, Section 11, first paragraph is changed as follows:

[Use of the Optional Schedule is not mandatory. It is intended to serve as an alternate procedure for funding Cooperating Country National and Third Country National PSCs, regardless of the fund source. The schedule was developed for use when the Contracting Officer anticipates incremental recurring cost funded contracts. It should be noted that use of the Optional Schedule eliminates the need to amend the contract each time funds are obligated. However, the Contracting Officer is required to amend each contract not less than twice during a 12 month period to ensure that the contract record of obligations is up to date and agrees with the figures in the master funding document.]

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