Senior Obligation Alignment Review (SOAR) PROCESS

Acquisition & Assistance (A&A) Solicitations ≥ $40 Million and Public International Organization (PIO) Agreements ≥ $10 million

*10 business days*

*3 business days*

*3 business days*

*5 business days*

*5 business days*

**Review Meeting**

**Needed?**

SOAR Liaison forwards SOAR to Planner who forwards to the CO/AO or signing official

Planner initiates

SOAR and obtains Mission Director (field)/Office Director (USAID/W) clearance

Planner forwards SOAR document to Responsible SOAR Liaison (Copy to [soar@usaid.gov](mailto:soar@usaid.gov) –Secretariat provides feedback if not in compliance with Automated Directives System (ADS) requirements)

SOAR Liaison coordinates internal operating unit clearances and simultaneously forwards SOAR document to Pillar/Regional Bureaus, Center for Faith and Opportunity Initiatives (CFOI) for comment and SOAR Advisors for feedback (Copy to [soar@usaid.gov](file:///C:\Users\jgiandoni\Downloads\soar@usaid.gov))

SOAR Liaison coordinates with Planner to address comments/feedback and revise SOAR as necessary

SOAR Liaison obtains clearance from AA (Copy to [soar@usaid.gov](file:///C:\Users\jgiandoni\Downloads\soar@usaid.gov))

SOAR Liaison obtains clearance from AA/M, GC and OSDBU (Copy to [soar@usaid.gov](mailto:soar@usaid.gov))

SOAR Liaison forwards cleared SOAR document to Executive Secretariat (ES) for Administrator approval or meeting request

(Copy to [soar@usaid.gov](file:///C:\Users\jgiandoni\Downloads\soar@usaid.gov))

ES obtains Administrator comments or approval and returns SOAR document to SOAR Liaison

(Copy to [soar@usaid.gov](file:///C:\Users\jgiandoni\Downloads\soar@usaid.gov))

**No**

**Yes**

ES sends approved SOAR document to SOAR Liaison (Copy to soar@usaid.gov) who then sends to Planner for forwarding to CO/AO or signing official

Administrator conducts review meeting and modifies, approves, or rejects SOAR documents.

**ES works with Responsible SOAR Liaison on any revisions.**

***5 business days***

**Responsible SOAR Liaison** – Individual in USAID/Washington who collects feedback and comments from his/her operating unit and stakeholder operating units and coordinates with the designated planner.

**SOAR Advisors** – Designated individuals who provide substantive input and advice on a SOAR document and ensure it meets criteria of Agency priority lenses.

**Pillar Bureau** – Bureau for Global Health (GH); Bureau for Food Security (BFS); Bureau for Democracy, Conflict, and Humanitarian Assistance (DCHA); Bureau for Economic Growth, Education, and Environment (E3).

Senior Obligation Alignment Review (SOAR) PROCESS

Acquisition & Assistance (A&A) Solicitations < $40 Million and Public International Organization (PIO) Agreements < $10 million

*5 business days*

*5 business days*

*3 business days*

Responsible SOAR Liaison forwards approved SOAR document to Planner (Copy to [soar@usaid.gov](file:///C:\Users\jgiandoni\Downloads\soar@usaid.gov)) who then forwards to CO/AO or signing official

Planner initiates

SOAR and obtains Mission Director (field)/Office Director (USAID/W) clearance

Planner forwards SOAR document to Responsible SOAR Liaison (Copy to soar@usaid.gov – Secretariat provides feedback on compliance with ADS requirements)

Responsible SOAR Liaison coordinates internal operating unit clearances (no more than 4) and simultaneously forwards SOAR to functional/regional bureau and CFOI for comment and shares SOAR with SOAR Advisors (Copy to soar@usaid.gov)

Responsible SOAR Liaison coordinates with Planner to address comments and revise SOAR as necessary

Responsible SOAR Liaison forwards SOAR documents to AA for Approval

(Copy to [soar@usaid.gov](file:///C:\Users\jgiandoni\Downloads\soar@usaid.gov))

**Responsible SOAR Liaison** – Individual in USAID/Washington who collects feedback and comments from his/her operating unit and stakeholder operating units and coordinates with the designated planner.

**SOAR Advisors** – Designated individuals who provide substantive input and advice on a SOAR document and ensure it meets criteria of Agency priority lenses.

**Pillar Bureau** – Bureau for Global Health (GH); Bureau for Food Security (BFS); Bureau for Democracy, Conflict, and Humanitarian Assistance (DCHA); Bureau for Economic Growth, Education, and Environment (E3).