



USAID
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Updated Guidance for Modified Acquisition & Assistance Request Document (MAARD) Usage

A Mandatory Internal Reference for
ADS Chapters 302 and 303

Revision Date: 08/21/2006
Responsible Office: M/OAA/P
File Name: 302mag_082106_cd45

**Functional Series 300
Acquisition and Assistance**

INTERIM UPDATE 02-05

SUBJECT: Updated Guidance for Modified Acquisition & Assistance Request Document (MAARD) Usage

NEW MATERIAL: This notice supersedes the MAARDREV guidance contained at the USAID FORMS section of the intranet.

EFFECTIVE DATE: 07/01/2002

POLICY

USAID/General Notice
M/OP
07/12/2002

Subject: Updated Guidance for Modified Acquisition & Assistance Request Document (MAARD) Usage

One of the recent tasks for the newly created USAID Business Transformation Executive Committee (BTEC) was to examine excessive and/or unnecessary reporting requirements. As a result of this examination, it was determined that the MAARD guidance needed to be revised. This notice supersedes the MAARDREV guidance contained at the USAID FORMS section of the intranet.

The MAARD was initially designed to facilitate entry of Mission award data into the Acquisition and Assistance (A&A) module of the New Management System (NMS)-namely the A&A NMS request. It specifically captures all necessary commitment information for the Controller in addition to pertinent information required by the Contracting Office in order to execute an award. The MAARD also captures Line Item and Delivery/Shipping Schedule information required for entry of a request into NMS A&A.

Missions must continue to use the MAARD to capture/record commitment information for procurement actions. Previously, Missions were required to complete the entire MAARD for all procurement actions. Upon closer examination, it has been determined that completion of pages two and three of the MAARD is not always necessary. If the Mission is sending the MAARD to a USAID/W Contracting Officer (CO) for award, then it must complete MAARD pages two (Line Item data) and three (Delivery and Shipping Schedule information). These pages are required for entry into NMS A&A and all actions executed by USAID/W COs must be entered into NMS A&A. However, if a field Contracting Officer (CO) will make the award, then the Mission does not need to complete pages two and three.

The MAARD form, along with the updated MAARDREV clarification document are included at the USAID FORMS section of the intranet,

<http://tcoweb.usaid.gov/forms/default.htm>. They are also included as attachments to this notice. This new guidance will be included as a Mandatory Reference in ADS chapters 302, 303, 306, and 308.

Point of Contact: Any questions concerning this Notice may be directed to Judy Britt, M/OP/CIMS, (202) 712-0397.

Notice 0722

MODIFIED ACQUISITION AND ASSISTANCE REQUEST DOCUMENT

Status: Pending
Page: 1 of 5

1. Benefiting Country		2. Managing Request No. Org Req:		3. Amend No.	
4. Authorized Agent		5. Request Title		6. Date Award Needed By:	
7. Type of Action <input type="checkbox"/> New Award <input type="checkbox"/> Mod to Existing Award <input type="checkbox"/> Inc Funding <input type="checkbox"/> Acquisition <input type="checkbox"/> Assistance <input type="checkbox"/> Inter-Agency <input type="checkbox"/> Unilateral Agreement <input type="checkbox"/> Subobligation Under a Bilateral Agreement				8. Contract/Grant/Cooperative Agreement Reference Number (If this is for an order or a modification to an award)	

ACTION TYPE -

9. USAID Funding (attach a detailed budget in support of line items as Attachment A

Activity :		Fund Account:		Amount Committed :
Activity :		Fund Account:		Amount Committed :
Activity :		Fund Account:		Amount Committed :
Activity :		Fund Account:		Amount Committed :
Activity :		Fund Account:		Total Commitment:
Activity :		Fund Account:		Total Commitment:
				Total Commitment:

Organization/Activity Chaining to the Lowest level:

10. Instructions to Authorized Agent:

11. Address of Voucher Paying Office Contact:

Addressee:		Office and Room:	
Address (line one):		Address (line two):	
Location:		Phone:	

12. Participants

Requestor		Signature:
Program Manager		Signature:
Contracting Officer		Signature:
Negotiator		Signature:
Controller (Mission funded)		Signature:
FM/A (AID/W funded)		Signature:

13. The Program Manager is responsible for recording the commitment as soon as the issue that prevented this from being recorded in A&A is resolved.

Program Manager Signature:	
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15. Delivery and Shipping Schedule

#	Description	Delivery Qty	Delivery Date	Location Type	Location Address
				Ship To	
				Ship To	
				Ship To	
				Ship To	
				Ship To	
				Ship To	
				Ship To	
				Ship To	
				Ship To	
				Ship To	

Modified Acquisition and Assistance Request Document

Request No.:

16. Special Provisions

A. Language Requirements (Include funds in budget or training as required.)

B. Access to classified information Yes Access Type:

C. Duty post(s) and duration of technical specialists(s) services at post(s) (months):

D. Dependents' travel and support

E. Geographic code applicable to procurement waiver(s)
 1. 000 2. 935 3. 941 4. 899 5. Other (specify)

F. Salary approval(s) to exceed FS-1 salary are:
 1. attached 2. in process
 3. N/A

G. Cooperating country acceptance
 1. has been obtained 2. is in process
 3. is not applicable to services required

H. Clearance for procurement of IRT equipment, software, and services is:
 1. attached 2. is in process 3. N/A

I. OMB approval of any report to be completed by ten or more members of the general public under the statement of work. 1. attached 2. in process 3. N/A

J. Participant Training is is not being funded.

K. Requirement (contracts only) is recommended for:
 SB Set-Aside SDB Set Aside SBA 8(a) Program No Recommendation

L. Other (specify)

17. PROVISIONS FOR LOGISTIC SUPPORT	IN KIND SUPPLIED BY		FROM LOCAL CURRENCY SUPPLIED BY		TO BE PROVIDED OR ARRANGED BY SUPPLIER	NA
	USAID	COOPERATING COUNTRY	USAID	COOPERATING COUNTRY		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Commissary use: YES NO Pouch Use: YES NO Embassy Health Room Privileges: YES NO

Request No:

18. Relationship of Contractor, Recipient, or Participating Agency to Cooperating Country and to USAID:
Relationship and Responsibilities:

19. Government furnished property/Government furnished equipment

20. Summary of attachments that accompany the request (check applicable boxes)

- A. Detailed budget estimate in support of line items
- B. Evaluation criteria for competitive procurement
- C. Justification for procurement by other than full and open competition or noncompetitive assistance
- D. Statement of work or program description
- E. Waiver(s), justification(s), clearance(s), approval(s)

**CLARIFICATION OF CONTINUED MAARD USAGE FOR MISSION
ACQUISITION AND ASSISTANCE ACTIONS**

Missions, for some time now, have not submitted their procurement actions to USAID/W for NMS data entry. In light of that fact, the guidance pertaining to MAARD usage is being revised.

Q. Does a MAARD have to be completed for Mission Procurement Actions?

A. While the MAARD was initially developed to facilitate data entry of the request into NMS A&A, Missions must continue to use it as it also contains information necessary for recording a commitment into the Mission's financial system. In addition, it is the instrument by which a procurement request is forwarded to the Contracting Officer.

Q. Does the entire MAARD have to be completed?

A. There are currently five pages to the MAARD. Pages two and three specifically pertain to Line Item and Delivery/Shipping Schedules. Line Item and Delivery/Shipping Schedule information is required for entry into NMS A&A. If the Mission is sending the MAARD into USAID/W for a Washington CO to execute, the complete MAARD including pages two and three are required. If the award is to be executed in the field, then pages two and three are not required. However, for Commodity procurements, pages two and three must be completed for both Mission executed and Washington executed awards.

Q. Should a MAARD be completed for only OE funds or both Program and OE Funds?

A. MAARDs must be completed for both OE and Program funded awards.

Q. What about acquisitions utilizing Simplified Acquisition Procedures?

A. A Mission may choose not to use a MAARD for transactions utilizing simplified acquisition procedures. The OF 347 may be used instead. Regardless of the format used, the Contracting Officer must ensure that funds have been committed by the Controller before signing any obligation documents.

Q. How should MAARDS be numbered?

A. The numbering system for MAARDS can be whatever the Mission/Office decides. In the NMS the request number is merely a system generated sequential number.

Q. Are signatures required on MAARDS?

A. Signatures are required for all MAARDS. After the appropriate signatures have been obtained, the controller must stamp the MAARD "committed" when he or she enters the commitment transaction in MACS. The Controller's signature on the MAARD certifies that funds have been committed in MACS. Block 15(G.) on the MAARD requests information pertaining to Cooperating Country acceptance. If Host Country approval is required, check box (1) "has been obtained," and attach a copy of the document with the signature.

Q. Does the entire MAARD have to be completed for Amendments and Modifications?

A. The entire MAARD does not have to be completed for amendments/ modifications that do not involve a change in the contract/agreement's scope, such as no cost extensions or for incremental funding. In these cases, the face sheet of the MAARD will suffice.

Any questions regarding the information in the above clarifications should be sent to Judy Britt, M/OP/CIMS.

File name	Notice Date	Effective Date	Editorial Revision Date	ADS CD No.	Remarks
iu3_0205_071502_cd28	07/12/2002	07/01/2002	N/A	ADS CD 28	New
302mag_082106_cd45	N/A	07/15/2002	08/21/2006	ADS CD 45	Turned IU into a references, 302mag