

STATEMENT OF WORK

Job Title:

Writer/Editor

Special Project:

Retirement Considerations and Pension Planning

Background:

The increase in the number of new employees brought into the Foreign Service through the Diplomatic Readiness Initiative has also brought an increase in the number of new spouses. Backgrounds of these new spouses are diverse. There is a wide range of talent and expertise, as well as a range of expectations about employment.

Not all spousal employment expectations are met by traditional job opportunities found within U.S. missions abroad or on the local economies of host countries. FLO has seen a growing interest in entrepreneurship as an employment option and has identified a need to increase its publications about the subject. FLO seeks to develop information regarding retirement considerations and pension planning for the self-employed as a means of providing support to spouse entrepreneurs.

Entrepreneurship for U.S. diplomatic spouses has not been fully explored. Currently, there is no FLO publication that provides retirement information for self-employed or overseas contract hired diplomatic spouses. A publication is needed to provide basic information on retirement considerations, including government sponsored retirement accounts, i.e., Keoghs, SEP IRAs, and SIMPLEs, which allow self-employed individuals to set up a personal pension.

Scope:

The publication will be focused on basic retirement considerations and pension planning for U.S. diplomatic spouses who are owners of small businesses or otherwise self-employed. The completion of this project will require targeted research, information gathering, writing, and editing.

Suggested topics to serve as a basis for the publication are below. We welcome additional suggestions:

- Retirement goals: How much is needed in savings? Is it possible to save the necessary amount being self-employed? How can one best determine individual goals and make a plan?
- Retirement accounts for the self-employed (i.e. Keogh, SEP-IRA, SIMPLE)

- How each account works and a brief description of the key features;
- Social Security Administration research, including making deposits when self - employed and information on countries where we have Totalization Agreements and the logistics of transferring these payments to US Social Security.
- Retirement years: What you need to know before you reach the retirement years; things to take into account now; how to manage finances in retirement;
- Early and Semi-Retirement: Is early or semi-retirement possible for entrepreneurs? What are the advantages and disadvantages? What can be done to plan ahead?
- Where can spouses go for more information? (suggested web sites, books, other resources)

The goal of the publication is to provide basic information as a starting point from which spouses can conduct further research specific to their individual questions.

Specific Requirements:

The writer/editor will:

- Report to the Special Employment Projects Coordinator, who will oversee the project and provide guidance;
- Work from a home office;
- Meet with FLO to determine the most appropriate content and format for the publication. (The content of the publication is subject to the approval of FLO);
- Develop and present a suggested table of contents and obtain FLO's approval before undertaking further research and development of the project;
- Suggest effective ways to structure the publication to meet specified goals;
- Conduct research in an organized, focused manner using appropriate resources;
- Format the publication in a professional manner that is clear and easy to read;
- Develop a professional looking cover, table of contents, bibliography of additional resources, and short index;
- Include page numbers on the manuscript;

- Revise drafts or make additional or corrections, as needed, or if requested by FLO;
- Present the completed project to the FLO in hard copy, as well as in electronic form; and
- Complete the project on time.

Special Contract Requirements:

- **Work schedule:** This is a product-oriented assignment with deliverables due on the dates specified in the timetable below. If requested, and if deemed necessary, FLO may consider extensions on due dates. Work is compensated with a flat fee and not an hourly salary. The writer/editor will propose a general work schedule to the Special Employment Projects Coordinator. The schedule is flexible and subject to approval by FLO.
- **Special security training:** Within 90 days of contract award, the contractor shall attend and complete a briefing by DOS Office of Counterintelligence (CI) on the special security requirements of the foreign affairs agencies. The briefing will be facilitated by DOS Diplomatic Security specialists and will be arranged at a mutually convenient time at Main State.
- **Record system:** The contractor shall plan, develop, use, maintain, and manage a record system in accordance with the Privacy Act of 1974 and other applicable laws, regulations, and guidelines governing confidentiality of counseling, and shall be subject to the penalties imposed by such laws for improper disclosure.
- **Dissemination of information:** There shall be no dissemination or publication of information developed specifically as a result under this contract without prior written approval from the Contracting Officer.
- **Computer, Internet, and network security:** The contractor shall exercise due diligence in implementing commercial best practices with regard to computer, Internet, and network security to ensure the confidentiality, integrity, and availability of information and services needed to meet the requirements of this contract.
- **Surveillance data:** The contractor shall never sell or disclose surveillance data. Any information gained by surveillance of transactions between DOS, its employees, and the contractor, including but not limited to the following shall be termed surveillance data: recordings or connection data associated with telephone calls, computer system information, such as IP addresses or GUIDs, and/or information gained through the use of techniques such as cookies.

- Data ownership: Information developed specifically for the Family Liaison Office as a result of this contract will be considered DOS property. The contractor may retain all data described above until final contract close out, provided the data is stored securely and off-line.
- Disposition of data: The contractor shall provide written proof of disposal of data within 60 days of final contract close out.
- Prohibition of subcontracting: The contractor shall complete all work agreed to in the Statement of Work. Any use of subcontractors is prohibited unless first approved and authorized by FLO.

Deliverables:

<u>Item</u>	<u>Due Date</u>
Meet with FLO to determine appropriate format	7 calendar days after contract award
Create a time line of tasks for completion	14 calendar days after contract award
Present a first draft to FLO	45 calendar days after contract award
Meet with FLO Special Employment Projects Coordinator to brief on progress	At intervals mutually determined
Revise and polish manuscript	As needed and as requested by FLO
Present manuscript in final form to FLO	60 calendar days after contract award