

2027 DONALD M. PAYNE INTERNATIONAL DEVELOPMENT GRADUATE FELLOWSHIP PROGRAM

FUNDING OPPORTUNITY NUMBER:

**U.S. DEPARTMENT OF STATE BUREAU OF HUMAN RESOURCES OFFICE OF
OUTREACH, FELLOWSHIPS, AND INTERNSHIPS**

STATEMENT OF WORK

I. Program Goals, Objectives and Outcomes

Effective management of the Donald M. Payne International Development Graduate Fellowship Program is fundamental to its overall success. The Department is fully invested in this program and seeks to maintain a program of integrity and high quality. The goals and objectives of the program include, but are not limited to:

i. Program Goals

The overarching goals of the Payne Fellowship Program are to:

- Develop new talent for the Department of State's Foreign Service at the graduate level; individuals who are dedicated to pursuing Foreign Service careers, can effectively "respond to the complex challenges of modern diplomacy and international relations," and can "provide the highest caliber of representation" for America's interests abroad.
- Bring in top talent to fill critical skill needs for current and projected foreign policy and international development priorities.
- Contribute to a Foreign Service that is "representative of the American people."

ii. Program Objectives

The objectives of the Payne Fellowship Program are to:

- Develop highly talented and qualified candidates from across the United States for a Foreign Service career in the U.S. Department of State through a program of educational support and professional development.
- Provide candidates and fellows with information on the service elements, benefits, challenges, and requirements of a Foreign Service career.

- Provide candidates and fellows with information on the benefits and obligations of the fellowship and the need to complete Foreign Service entry requirements, including obtaining and maintaining required clearances (security, suitability, and medical) and taking the Foreign Service Officer Test (FSOT) and passing the Foreign Service Officer Assessment (FSOA).
- Provide funding to assist fellows toward completing graduate degrees in academic disciplines representing the skill needs of the Department's Foreign Service, with particular emphasis on international development.
- Enhance fellows' understanding of U.S. foreign policy and the work and lifestyle of the Foreign Service through a domestic internship in Washington, D.C. and an overseas summer development experience at an embassy, consulate, or mission.
- Provide Fellows with one-on-one mentoring and professional development training to expose them to information that will help prepare them to be successful Foreign Service Officers. To assist Fellows with career track selection, emphasis will be placed on the important contributions of all five career tracks to the Department's mission.
- Administer the program in a strategic and efficient way that produces the intended results.

iii. Expected Results

Based on the goals and objectives of the program, expected results include, but are not limited to, the following:

- Candidates' knowledge of the benefits, challenges, and requirements of a Foreign Service career will increase.
- Fellows will be prepared for careers with the Department of State as Foreign Service Generalists through a program that includes financial assistance toward the completion of a two-year master's degree, mentoring, a domestic internship, an overseas summer development experience, and professional development.
- Fellows will complete graduate degrees in academic disciplines representing the skill needs of the Department's Foreign Service.
- Fellows will complete FSOT, FSOA, medical review, security, and suitability clearance requirements as outlined in the fellowship agreement in a timely manner.
- The program will be administered in a cost-effective manner, resources will be matched to program objectives, and all program elements will be completed within budget.

II. General Recipient Responsibilities

- Adhere to all HR/OFI guidance and procedures.

- The Recipient will need to be attentive and responsive to Payne Fellows' needs and those of the Department.
- The Recipient will need to demonstrate dedication and commitment in pursuing the goals of the program, as well as the ability to engage and work closely with HR/OFI in meeting all requirements.
- The Recipient must have sufficient staff with relevant qualifications to administer the program and liaise with HR/OFI on all aspects of the program. Knowledge of the Department's Foreign Service career system and/or program administration experience is preferred.
 - A senior-level program manager with decision-making authority must be readily available and responsive to HR/OFI requests during the period of performance.
- The Recipient must submit to HR/OFI, in draft, for review and final approval, a milestone schedule for the 2027 cohort. Key activities to be identified in the milestone schedule should include, but are not limited to:
 - Dates associated with orientation
 - Completion, delivery, and posting dates for promotional materials
 - Tuition and stipend payment dates
 - Frequency of social media postings with description of content
 - Dates associated with domestic internship, professional development series, and overseas summer development experience (including lodging move-in/move-out dates for domestic summer internships)
- The Recipient will be responsible for submitting required quarterly performance progress reports and financial reports.
- The Recipient must develop an evaluation strategy to measure the impact and outcomes of the Payne Fellowship Program. The Recipient must submit the proposed evaluation strategy to HR/OFI for prior approval.
- The Recipient must conduct surveys of the cohort to elicit opinions on the effectiveness of program components and program administration, and submit results to HR/OFI via performance progress quarterly reports and the final report.
- The Recipient will consent to meetings, as requested, with HR/OFI leadership participation to review the status of the program.
- The Recipient agrees that HR/OFI has proprietary rights to all databases, surveys, statistics, and related information regarding cohorts under its management. If, during an open competition, this grant were awarded to another entity, the Recipient will be required to relinquish said information to HR/OFI.

III. Substantial Involvement

The Payne Fellowship is administered via a cooperative agreement. HR/OFI, as the grantor, is substantially involved in the program activities above and beyond routine monitoring. HR/OFI activities and responsibilities for this program include, but are not limited to, the following:

- Provide overall program and policy design and direction to the Recipient regarding administration of the fellowship.
- Ensure that the Recipient complies with the stated program goals and objectives.
- Review and analyze the Recipient's promotion of the Fellowship Program goals.
- Monitor and evaluate the Recipient's delivery of the desired product.
- Review the Recipient's budget submissions to ensure they meet HR/OFI's requirements for the program.
- Review Recipient reports of program activities, evaluating the effectiveness of the Recipient and its ability to favorably impact the program.
- Review and approve the annual milestone schedule and any programmatic date changes.
- **Outreach**
 - Review and approve publicity, orientation, mentoring, and professional development materials.
 - Review and approve all content to be posted on the website and social media outlets.
- **Graduate School**
 - Review and approve graduate school degree programs prior to new Fellow orientation.
- **Orientation**
 - Collaborate with the Recipient on the design and development of the orientation schedule.
 - Organize orientation networking events with the Recipient.
 - Arrange orientation briefing sessions with the Recipient for new Fellows on issues related to the Fellowship and a Foreign Service career.
- **Domestic Internship/Overseas Summer Development Experience**
 - Identify Department of State domestic and overseas summer development experience placements for Fellows.
 - Review any requests for internship/summer experience funds that exceed the limit.
 - Review and counsel Fellows regarding their internship evaluations when necessary.
- **Professional Development**
 - Review and approve the professional development series schedule and topics.
 - Review and approve professional development facilitators and presenters.

- **Mentors**
 - Review and approve all Foreign Service mentors.
- **FSOA/FSOT**
 - Provide information to Fellows on FSOA and FSOT requirements and assist them with scheduling.
 - Collaborate with the Recipient on verifying Fellows' completion of FSOA and FSOT requirements.
- **Security Clearance, Suitability Clearance, Medical Review**
 - Provide information to Fellows on the security/suitability clearance and medical review process.
 - Track security/suitability clearance and medical review status of Fellows and inform Fellows and the Recipient of determinations.
- **Deferrals and Termination/Repayment**
 - Make the final decision on termination and repayment obligations of Fellows.
 - Review and make the final decision on deferral requests.

IV. Program Description

The Payne Fellowship provides outstanding candidates entering graduate school with funding to assist in the completion of a two-year master's degree in an area relevant to the Foreign Service of the Department of State, with an emphasis on international development. Fellows complete domestic and overseas internships with work focused in the areas of foreign assistance implementation and/or international development during graduate studies. Fellows complete a domestic internship at an office of the Department of State in Washington, D.C. and an overseas summer development experience at a U.S. embassy, consulate, or mission. In addition, Fellows receive mentoring from a Foreign Service Officer and professional development training during the program. Fellows who successfully complete the fellowship program and Foreign Service entry requirements, including passing the FSOT and FSOA, receive appointments as Foreign Service Officers, in accordance with applicable law and State Department policy. Fellows are obligated to complete a minimum of five years of service. Fellows who do not successfully complete the fellowship program and the subsequent five-year service obligation may be subject to a reimbursement obligation.

This award will provide for up to 10 Fellows and will cover approved program expenses for the program period. The Recipient will be advised of the final number of Fellows prior to the program cycle. The current model allocates: 1) up to \$55,000 per academic year per Fellow for actual expenses for tuition and mandatory fees during the first and second years of graduate school; 2) a stipend for up to \$33,000 per academic year, for each of the two years of graduate study, to help cover room and board, books/laboratory fees, other academic fees not covered by

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tuition, and travel between the Fellow's residence and the academic institution; and 3) up to \$10,000 per summer for costs related to the domestic internship and overseas summer development experience — stipend, housing during the domestic internship, domestic and overseas travel, visa fees, mandatory inoculation fees, and emergency medical evacuation insurance.

Fellowship Applicant Criteria

The Payne Fellowship Program requirements include: 1) proof of U.S. citizenship at time of application; 2) seeking admission to a two-year, full-time master's degree program for the following academic year (fall entrance) in selected fields of study representing the needs of the Department, including international relations, public policy, public administration, public health, political science, anthropology, social sciences, foreign languages, business administration, agricultural studies, economics, environmental sciences, engineering, and other degrees relevant to the Department's requirements for entry into the Foreign Service; 3) a minimum 3.2 undergraduate grade point average or higher on a 4.0 scale; and 4) in addition to outstanding leadership and academic achievement, demonstration of financial need through proof of participation in federal TRIO programs, recipient of the federal Pell Grant, or other documents approved by the Bureau of Human Resources..

V. Projected Program Timeline

HR/OFI envisions the Payne Fellowship Program timeline as follows:

- **February 2027:** Fellows begin onboarding to program — clearance process begins, agreements signed
- **February 2027:** Fellows begin medical review process
- **Week of June 1, 2027:** Payne Fellowship Orientation
- **Summer 2027:** Fellows matched with Foreign Service mentor
- **August/September 2027:** Payne Fellows begin two-year graduate program
- **May/June 2028:** Payne Fellows begin domestic Department of State internship and professional development series
- **August/September 2028:** Payne Fellows complete domestic internship and begin second year of graduate program. Payne fellows complete a two-week security seminar at National Defense University.
- **May 2029:** Payne Fellows complete two-year graduate program
- **May/June 2029:** Payne Fellows begin overseas Department of State summer development experience
- **September 2029:** Payne Fellows who meet all entry requirements onboard as Entry-level Foreign Service Generalists

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VI. Program Specific Guidelines

The specific responsibilities of the Recipient are detailed below:

In consultation with HR/OFI, the Recipient will be responsible for the programmatic, financial, and administrative activities for the Payne Fellowship. HR/OFI will work collaboratively with the Recipient in administering the program. The Recipient will be responsible for conducting the day-to-day activities associated with management of the program and must consult with HR/OFI, which will have final approval in consultation with the Grants Officer, on all policy matters affecting the program.

A. Website:

Recipient will establish and maintain a website to include up-to-date program description, including eligibility requirements, application information and information about Foreign Service careers with the U.S. Department of State. The program website should also conform to GSA section 508 guidelines to ensure equal access to users with disabilities. In addition, the Recipient will establish an email address for the program. Recipient will obtain GTM/TAC approval for all content posted on the website.

B. Fellowship Agreements

- In consultation with HR/OFI, distribute the agreements to those selected as finalists.
- The Recipient must submit all signed agreements together to HR/OFI prior to orientation.
- Ensure that all Fellows' agreements have been received and countersigned by the Department prior to Fellows attending the Payne Orientation.

C. Orientation

In collaboration with HR/OFI, the Recipient will organize the week-long orientation program for new Fellows conducted in early June 2027. The orientation program is conducted in Washington, D.C. In organizing the orientation program, the Recipient will be expected to:

- Provide all administrative functions for the orientation and professional development seminars, to include arranging travel and lodging for the Fellows, name tags, folders, etc.
- Counsel Fellows on the benefits and obligations of the Fellowship.
- Ensure Fellows receive all instructions related to medical examinations and are present for their appointments if conducted during orientation.
- In consultation with HR/OFI, identify speakers and organize briefing sessions and networking events to discuss issues related to the Payne Fellowship and a Foreign Service career, including sessions on all five career tracks.

- Arrange an information session on the FSOA, in consultation with HR/OFI. The session must be offered by a qualified consultant approved by HR/OFI.
- Perform other related activities as needed by HR/OFI.

D. Domestic Internship and Overseas Summer Development Experience

There is one domestic internship in Washington, D.C., during the summer after the first year of graduate school, and one overseas summer development experience at a U.S. embassy, consulate, or mission after the second year of graduate school during the two-year Fellowship program. In collaboration with HR/OFI, the Recipient will be expected to:

- Ensure Fellows have successfully completed their academic requirements, received required clearances, and met the minimum medical qualification standard before disbursing funds associated with the domestic internship/overseas summer development experience and arranging travel. Fellows must receive Top Secret (TS) security clearance to participate in the domestic DOS internship. Fellows must receive the TS security clearance and meet the minimum medical qualification standard to participate in the overseas DOS summer development experience. For both the domestic internship and overseas summer development experience, the Fellow must not have been denied suitability clearance.
- Counsel Fellows on domestic internship/overseas summer development experience choices.
- Ensure that Fellows understand what the program covers with regard to travel, housing, stipend, evacuation insurance, baggage, inoculations, and visas.
- In consultation with HR/OFI, ensure coverage of all required visas and mandatory inoculations for Fellows traveling abroad.
- Maintain a productive relationship with a reliable travel agency that can produce results as needed. In consultation with HR/OFI, facilitate and ensure Fellows have reasonable emergency medical evacuation insurance coverage and have met the required Department of State minimum medical qualification standard prior to beginning the overseas summer development experience.
- Ensure Fellows have required emergency medical evacuation insurance coverage prior to beginning the overseas summer development experience.
- Identify and arrange appropriate housing for Fellows during their domestic internships, generally in university dormitories; handle payments for housing and provide HR/OFI with accounting information. Domestic lodging rates during domestic internships are subject to standard U.S. government per diem rates. The Recipient may reimburse Fellows choosing alternate housing up to the amount of the cost of lodging provided by the Recipient.

- Remain current on Fellows' start and end dates of the domestic internship and overseas summer development experience.
- Follow up with Fellows, in writing, to ensure that they have arrived and reported, as scheduled, at their overseas summer development experience location. Notify HR/OFI of any late arrivals with accompanying explanation.
- Review and counsel Fellows regarding their domestic internship/overseas summer development experience evaluations and recommend ways to improve and strengthen their future performance if the Fellow receives a rating that does not meet expectations.
- Require Fellows to submit, in writing, a 1–2-page assessment of their two experiences highlighting what they learned about the Foreign Service and how the experience will help them in their future Foreign Service careers. The Recipient must receive the assessment within two weeks of the Fellow completing his/her domestic internship/overseas summer development experience. The Recipient must submit a copy of each assessment to HR/OFI upon receipt.
- Perform other related domestic internship/overseas summer development experience activities as needed by HR/OFI.

E. Professional Development

- The Recipient is to develop and conduct a mandatory series of professional development seminars that will take place during the summer after the Fellows' first year of graduate school, when they are in Washington, D.C., completing their domestic internships. These sessions should help prepare them for careers with the Department of State as FSOs with experience in implementing foreign assistance. Session topics will be determined in collaboration with HR/OFI.
- Professional development series facilitators and presenters must be reviewed and approved by HR/OFI.
- At the end of the series, the Recipient is to conduct a participant survey and present the findings with recommendations to HR/OFI.
- The Recipient is responsible for monitoring Fellows' attendance and addressing Fellows' unapproved absences.
- The Recipient must ensure the professional development series includes sessions on all five Foreign Service career tracks.

F. Mentoring

- The Recipient is to assign Foreign Service mentors and sponsors to all newly selected Fellows no later than the beginning of the Fellows' first semester of graduate school. The Recipient must submit, for HR/OFI review and approval, a list of all proposed mentors and sponsors. Mentors must be tenured FSOs. Mentors and sponsors should be assigned

from all five career tracks. Mentors should have experience implementing foreign assistance programs.

- The Recipient should also serve as mentor to the Fellows. The Recipient will be expected to conduct quarterly one-on-one sessions with each Fellow during which issues that could impact participation in the fellowship and/or completion of Foreign Service entry requirements should be discussed.

G. Foreign Service Officer Test (FSOT) and Foreign Service Officer Assessment (FSOA)

- Ensure each Fellow is aware of their obligation with regard to passing the FSOT and FSOA. Fellows are required to pass the FSOT prior to selection as a Fellow. Fellows are required to pass the FSOA prior to completing their graduate school program. In the event the Fellow is unsuccessful on their first attempt at the FSOA, the Fellow must attempt to take the FSOA every 180 days, or as permitted by the Bureau of Examiners (BEX), until completion of the graduate school program. If the Fellow fails to pass the FSOA by the time of graduation from their master's degree program, they will be onboarded as Consular Limited Non-Career Appointments (LNAs) without further opportunity to take or pass the FSOA.
- The Recipient must submit reports to HR/OFI on the status of each Fellow and cohort with regard to this requirement prior to their entry into the Foreign Service.

H. Tracking

- Maintain institutional databases relevant to program administration.
- Maintain databases of Fellows for purposes of tracking: a) current contact information, b) GPA and academic program status, c) successful completion of program requirements, d) successful completion of contractual obligations, e) withdrawals/dismissals from the program prior to completion, f) deferrals, g) areas of study, h) languages spoken, and other relevant statistical information.
- Perform other related tracking activities as needed by HR/OFI.

I. Monitoring

The Recipient should monitor and report on performance indicators that are specific, measurable, achievable, reasonable, and time bound. Performance targets for each expected result should be established, with details on what sources of data will be used to document performance. Indicators should be relevant to the goals or objectives of the program.

Indicators may include, but are not limited to:

- Effectiveness of program elements in preparing Fellows for Foreign Service careers and increasing their knowledge of U.S. foreign policy and the work and lifestyle of the Foreign Service:
 - Assessed through participant surveys on program elements — orientation, professional development training, internship, summer development experience, and mentoring
 - Percent of Fellows indicating an increase in their understanding of the five Foreign Service career tracks
 - Percent of Fellows indicating successful to fully successful performance ratings on delivery of program elements — orientation, financial assistance toward the completion of a two-year master's degree, professional development training, internship/summer development experience support, and mentoring
- Number of Fellows completing the program requirements, including:
 - Graduate degree in a discipline representing the skill needs of the Foreign Service
 - Medical review and security and suitability clearances in a timely manner
 - Taking the FSOA/FSOT as outlined in the Fellowship agreement in a timely manner
- Number of Fellows matched with Foreign Service mentors by the start of their first semester of graduate school
- Number of quarterly one-on-one mentoring sessions held with Fellows
- Attrition and retention rates of the cohort
- Program elements completed on time and within budget

J. Administrative

- Maintain a document file for each Fellow with all written correspondence, contractual agreement, payments, and other pertinent data, and provide to HR/OFI as requested.
- Provide HR/OFI, in a timely manner, with additional information on Fellows as needed.

a. Disbursement of Funds

- Prior to disbursement of any Fellowship funds, the Recipient coordinates with HR/OFI to ensure the Fellow has met all necessary requirements.
- For each semester, provide HR/OFI with a list of: 1) Fellows enrolled in academic programs, 2) their graduate institution, and 3) the amount of Fellowship funds disbursed. Prior to disbursement of Fellowship funds, the Recipient will coordinate with HR/OFI to determine if the Fellow has requested a deferral.
 - Should a Fellow not receive and maintain a worldwide-available medical clearance, Top Secret security clearance, or not pass the required suitability review prior to the start of their first academic semester after being selected for the Fellowship program, HR/OFI will present the Fellow with the option to defer

for a maximum of one academic year while their medical, security, or suitability clearances are pending.

- Ensure that the Fellow understands the reasons for any payment delays and help manage the Fellow's expectations with regard to disbursement of Fellowship funds.
- Establish and maintain effective and productive relationships with Student Accounts Offices at each Fellow's graduate institution and make timely payment of tuition and other fees up to the established cap limit. Provide HR/OFI with accounting.
- Ensure Fellows have received the required security clearance and met the minimum medical qualification standard before disbursing funds associated with the overseas summer development experience, including travel and stipend funds.
- Make academic/domestic internship/overseas summer development experience stipend disbursements to Fellows. Provide HR/OFI with accounting.

b. Deferral Requests

- Ensure Fellows understand the conditions under which deferrals may be accepted, and that any deferral request be accompanied by required supporting documentation and the Recipient's recommendation for granting the deferral request. Counsel Fellows that deferral requests for purposes beyond those authorized will not be accepted.

c. Record Keeping

- Maintain transcripts of all Fellows. Fellows will be required to send an official transcript each semester to the Recipient per their agreement. Should the Recipient fail to receive a transcript from a Fellow, the Recipient will send a letter to the Fellow requesting compliance with their contract and notify HR/OFI immediately.
- Monitor Fellows' academic progress, ensuring adherence to academic terms of the agreement, which require the Fellow to maintain a 3.2 grade point average on a 4.0 scale. If cumulative GPA falls below 3.2 in any given semester, the Recipient must: 1) notify the Fellow that they have been placed on probation, 2) require the Fellow to submit a plan outlining actions to improve their GPA, and 3) notify HR/OFI of this matter. If cumulative GPA falls below 3.2 for a second semester (consecutive or otherwise), the Recipient must: 1) notify the Fellow with a second probation alert; 2) require the Fellow to submit a plan outlining actions to improve their GPA; and 3) notify HR/OFI within 15 days with a recommendation for continuing/discontinuing the Fellow's participation in the program. HR/OFI will make the final decision.
- Maintain a file for each Fellow with correspondence, contractual agreement, payments, and other pertinent data. These files must be kept in accordance with 2 CFR 200.