



**USAID**  
FROM THE AMERICAN PEOPLE

## **USAID Partner Community Outreach Plan**

### **September 2011 to September 2012**

The U.S. Agency for International Development (USAID), as the premier U.S. development assistance provider, is dedicated to expanding its partner base in order to highlight the best and most cost efficient development solutions. USAID regularly reaches out and works with the development partner community for planning and market research purposes. The Agency now actively seeks to expand its reach to new and existing partners who are interested in working with USAID overseas or in Washington D.C.

This USAID Partner Community Outreach Plan provides a map for USAID employees to engage with organizations and firms throughout the acquisition and assistance award process—from the concept of a development activity through the close out of a program. This plan directly supports USAID Forward efforts under Implementation and Procurement Reforms and the efforts to increase competition, broaden our partner base, and provide more transparency within the award process, as appropriate. (For more on USAID Forward, please visit [www.usaid.gov](http://www.usaid.gov).)

The tools and activities put forth in this plan are best practices and suggestions for the USAID Acquisition and Assistance (A&A) workforce to engage upon as deemed appropriate. The A&A workforce includes Contracting & Agreement Officers (CO/AOs), Contracting/Agreement Officer's Representatives (C/AORs), Project Development Officers (PDOs), Project Officers (PO), Activity Managers, technical experts, and others participating in the USAID funding process.

### **Purpose**

Improve our business communications and enhance access to information for new and existing partners prior to, during, and after the USAID award process. Improvements will come throughout the year and focus on:

- More consistent and available open sessions to attract new and existing partners into entering the competitive process for USAID awards.
- Regular updates to USAID Business web pages with new and relevant information for the partner community.
- Clear guidance to USAID staff on how to hold more effective outreach sessions for the partner community during each phase of the award process, as appropriate.

## **Resources**

USAID must leverage existing resources in order to expand capabilities to reach out to vendors regularly and consistently. USAID teams, including COs, AOs and technical representatives, concurrently work on USAID Forward: Implementation and Procurement Reform initiatives which focus on broadening the USAID partner base, increasing competitive opportunities for all partners, and enhancing efficiencies within the USAID award process to simplify the procedures and regulations for the partner community. To reduce overburdens on staff time, USAID will focus outreach tools and efforts on activities and events that can manage broader audiences from the partner community whenever possible and appropriate.

USAID will seek to utilize new information technology (IT) tools as available to the Agency, including webinars, chat sessions, and other open access tools, to allow domestic and overseas audiences to participate in the events and sessions described within the section: Guidance on USAID Interactions with the Partner Community (see page 3). The Agency will also refer to the “25 Point Implementation Plan to Reform Federal Information Technology Management” issued on December 9, 2010 as it undertakes improvements per available resources to provide access to information for the partner community.

## **Responsible Actors and Roles**

**USAID Administrator:** Directs the Agency’s overall efforts to enhance partner community communications and involve new partners in the development award process per USAID Forward initiatives.

**Senior Management** (Chief Operating Officer, USAID Bureau heads, Mission Directors): All are responsible as heads of units for promoting staff to use the tools and practices available for communicating with vendors and partners in a fair and appropriate manner.

**Senior Procurement Executive:** This position will remain responsible for ensuring the integrity of the procurement process while setting new policy and standards for partner/vendor engagements during the procurement process within Agency guidance, including updated checklists and guides for CO/AOs and CORs/AORs. Through the Office of the Ombudsman, the Senior Procurement Executive has the overall responsibility for leading engagement of the partner community.

**Contracting & Agreement Officers:** All CO/AOs will be responsible for the manner and determination of criteria for when partner engagements should occur throughout the procurement process. CO/AOs will be expected to keep in mind the necessity of partner engagement for

unique opportunities with small and disadvantaged businesses as well as special initiative programs and complex awards.

**Technical Teams:** Technical teams often are the first USG officials to meet with potential partners who seek to discuss a programmatic area and/or their firm/organization's capabilities. USAID technical representatives may meet with potential partners via one-on-one meetings but they must work closely with the Office of Acquisition and Assistance (M/OAA) in advance of finalizing such meetings to assure that all communications remain at an appropriate level and that the appropriate CO or representative is present during such a meeting.

**Technical Representatives (CORs, AORs):** CORs and AORs will continue to communicate with partners, as needed, via the guidance approved within their designation letters by the CO/AO as well as in direct consultation with their CO/AO. COR/AORs should actively take part in Prior-to-Award sessions designated in the below guidance. COR/AORs also will continue regular contact with existing partners related to the terms of agreement under a contract, grant, cooperative agreement, or other USAID funding mechanism.

**Project Development Officers (PDOs):** PDOs will coordinate any external USAID consultations for pre-design or design concepts with the CO/AO prior to issuing public notices for these meetings/events.

## **Guidance on USAID Interactions with the Partner Community** Techniques and Tools for Enhancing Industry/Partner Interactions

### ***General Interactions with Industry***

USAID will employ a number of tools and platforms to reach out to industry on a regular basis. One tool that has historically been underutilized is the USAID public website. USAID has begun a major review of its external website to make this tool more user friendly and informative with top-level guidance for partnering with USAID. Already the Agency has reinvigorated the USAID Business Forecast on the external website to allow the partner community to understand the focus of development activities to come in future fiscal year quarters. Other plans include posting tutorials and quick guides for the public. As appropriate, the Agency will utilize existing social media platforms to update and highlight tips and information. The Office of the Chief Information Officer (M/CIO) and the staff of the Bureau for Legislative and Public Affairs (LPA) will play a major role in supporting these activities.

In addition to the USAID website and other public information documents, USAID will conduct a series of meetings and events throughout the course of the year to educate industry on USAID activities and processes.

### **How to Do Business with USAID Meetings/Conferences**

USAID regularly conducts meetings with industry and diaspora groups interested in USAID development programs overseas. These meetings may be a part of an overall meeting on a specific theme, sector, or country (*i.e.* Global Health or Haiti) or they may be special two-hour sessions designed to invite potential partners to better understand USAID practices and systems.

USAID's How to Do Business Sessions occur in Washington, D.C. as well as in USAID Overseas Missions. At times, USAID may participate in sessions across the United States in coordination with another USG entity or another organization. For example, USAID worked with a number of other government entities to reach out to potential vendors after the Haiti earthquake.

USAID will seek to utilize more webinars for these events as well as teleconferences to broaden audience reach.

### **USAID 101 Sessions**

To assist potential partners in familiarizing their organization or firm with USAID and our practices, USAID is hosting quarterly to bi-monthly USAID 101 sessions in Washington D.C. These sessions often cover some of the following topics: About USAID, Where We Work, Development Goals, Acquisition & Assistance Practices, and Steps to Working with USAID overseas or in Washington D.C.

USAID may elect to hold a webinar or teleconference for these events in order to reach potential and existing partners who could not otherwise attend in person.

### **Partner Exchange Days**

USAID will focus specific days throughout the year for industry to meet with USAID units to hear about programs and present their firm/organization's capabilities. Partner Exchange Days will be focused on specific themes to ensure the best matches may occur based upon Bureau/Office representatives availability. Companies/organizations may have 10 to 20 minutes with USAID representatives to present information and answer any questions posed by USAID representatives.

**Please note:** These exchanges do not serve as "pitching" sessions by firms/organizations. They are not designed to accept unsolicited proposals for funding. Procedures for submitting an

unsolicited proposal should be closely followed via the procedures found at:  
[www.usaid.gov/business/business\\_opportunities/](http://www.usaid.gov/business/business_opportunities/).

During Partner Exchange Days or any meetings with partners, USAID officials shall not: 1) discuss any procurements that are considered "open"; 2) make any promises to a firm or organization regarding a USAID award; or 3) divulge biased or unfair information—any information that is not considered public information—regarding USAID goals for specific projects.

### **Partner Day Listening Meetings**

USAID hosts a Partner Day Meeting each quarter throughout the fiscal year to hear from partner community representatives on A&A specific matters. These are smaller events not open to the general public in order to facilitate in-depth conversations with active USAID implementers to focus on current business issues. As a listening session, it allows USAID to understand concerns from current partners working overseas.

### **Diaspora Events**

USAID regularly conducts events and meetings with diaspora who are interested in supporting activities in their native countries. These events serve as a sharing space for potential partners to understand USAID development goals as well as to understand the specific types of activities the USG/USAID seek to achieve in a given region or country (*i.e.* Haiti, Pakistan, Philippines). These meetings assist USAID in building communities of development that can assist in finding innovative solutions to challenging development issues. They occur regularly throughout the year based upon interest levels of diaspora groups and based upon new priority activities in certain countries and/or regions. USAID will continue to explain USAID processes and how we may partner with organizations or firms during meetings with diaspora groups.

### **Small and Disadvantaged Business Conferences**

USAID hosts an annual conference to bring small, minority, and disadvantaged business owners together to learn more about USAID activities and discuss USAID business practices. These meetings also take place throughout the year, on a smaller scale, in order to build opportunities for potential partnerships with small, minority, or disadvantaged businesses.

### **Business Forecast Notifications**

Each quarter throughout the fiscal year, USAID posts a Business Forecast that helps depict early predictions of the requirements needed by USAID both in Washington D.C. and USAID overseas Missions. Notifications are posted at:  
[www.usaid.gov/business/business\\_opportunities/forecast/forecast.html](http://www.usaid.gov/business/business_opportunities/forecast/forecast.html).

### **Meetings with Industry Representatives**

U.S. federal regulations (FAR part 15) encourage exchanges of information with interested vendors; OMB's Myth-Busting Memorandum of February 2, 2011 reinforces this practice. When possible, USAID preference will be to meet with a group of industry representatives as often as possible during Partner Exchange events (per above) in order to best leverage USG/Agency resources and facilitate ongoing dialogue.

One-on-one meetings may occur with USAID units and potential partners in Washington D.C. or in USAID Missions worldwide. General guidance for conducting these meetings should be followed including:

- A CO/AO should be present during these meetings;
- There should be no exchange of information that would provide the potential partner with information that could jeopardize the integrity of a competitive environment; and
- These exchanges should be documented as to when they occur, topics discussed, and the representatives who attend from USAID and vendor firms/organizations.

Although one-on-one meetings may occur, USAID must remain cognizant of Agency resources and apply them most appropriately. Therefore, USAID will seek to host numerous vendors/partners during the aforementioned events to broaden our reach whenever possible.

### ***Prior to Award***

As indicated as part of Implementation & Procurement Reform under USAID Forward, one of the goals for 2011 is to enhance the posting of draft solicitations. The Agency's efforts in this regard are one of several means to better enable early engagement of the vendor community. Below are the communication tools that can be considered appropriate during the prior-to-award phase. Not all tools will be applied uniformly nor will one development program award be required to utilize each of these tools during this prior-to-award phase.

The discretion of the CO/AO and the technical team as well as the criteria described below should assist USAID employees in determining when to apply a certain tool to assist the partner community in better understanding a planned award/program.

The Agency will continue to consider formalized vendor engagement procedures within the framework of Acquisition and Assistance (A&A) Planning and Review which was instituted for FY2012 on November 29, 2011.

### **Draft Statements of Work (SOW) or Program Descriptions (PD) – Online Postings**

USAID will often post draft SOWs or PDs for a given program—this is considered a best practice to leverage development solutions from the partner community and ground truth our intended approach. SOWs and PDs may be posted online at FedBizOpps.gov or Grants.gov whenever possible to share and obtain concept ideas. USAID teams are strongly encouraged to post these documents for input and/or partner community sharing when:

- USAID seeks community input to fine-tune USG requirements for a development activity prior to the release of a solicitation or application request.
- USAID plans call for a complex activity in either multiple countries or in multiple sectors.
- Whenever practical, time permitting.

### **Project Design Meetings**

USAID seeks input from industry, host country stakeholders, fellow donors, and development partners regularly during the design of a program to ensure that we capture the development challenges in a country accurately and to understand the resources available as we map out a programmatic approach to provide sustainable solutions. Project design meetings can assist USAID technical teams, with the CO/AO present, in fine-tuning approaches based upon partner community feedback. Project Design meetings may occur in country or in Washington D.C., depending upon the activity. These meetings may be limited to relevant actors within a given sector or country but whenever possible should be opened to general public for input.

### **Draft Requests for Proposals or Applications (RFPs/RFAs) for Public Comment**

USAID seeks to expand its partner base and open more opportunities for industry to weigh in on design elements of overseas development programs. Obtaining industry feedback on development issues and potential solutions is a regular and best practice for the Agency. To this end, USAID is committed to more consistently posting relevant draft RFPs or RFAs online (via FedBizOpps.gov or Grants.gov) and via other more relevant public outlets for a specific country/region. USAID will continue to explore the benefit of using a wiki tool for this practice as well but will seek to utilize existing USG resources whenever possible.

General criteria for posting draft RFPs/RFAs online include:

- Any award that seeks industry input to fine-tune USG requirements prior to the release of a final solicitation
- Large program awards (more than \$100 million)
- Award includes requirements for a complex operating environment
- Whenever practical, time permitting

Drafts will be posted after internal USAID processes, including the Board for Acquisition and Assistance Reform (BAAR) review and other quality assurance checks for a program, are

completed. No evaluation criteria in regards to an award will be made available at this stage in order to maintain the integrity of the award process.

The USAID Administrator will issue a statement to the Agency to encourage this best practice and institute regular postings for broadened partner community participation.

### **Pre-Solicitation Meetings**

USAID supports the utilization of pre-solicitation conferences/meetings whenever possible or appropriate for a given program award. While there is no award minimum set within Agency guidance for holding this partner community interaction, the Agency does encourage USAID units to consider the benefit to industry for a pre-solicitation meeting when a number of the following factors are met:

1. Award for priority initiatives, such as Feed the Future
2. Award has a small or disadvantaged business focus
3. Award presents potentially complex requirements or has multiple issues to address
4. Award value is larger (more than \$100 million)
5. Award includes complex operating environment (political, social, economic, etc.)

USAID should hold these meetings at the time when requirements for a program are clearly recognized and use these sessions to help inform final requirements for the solicitation. USAID should utilize relevant technology, including teleconferences, webinars, and other forums to reach out to a broad set of participants. These meetings should not be tailored to a small group of individuals nor solely to one or two potential Offerors/Applicants. For any pre-solicitation conferences being hosted in country, written materials should be provided online for local and overseas participants and a teleconference or video conference should be made available.

### ***During Open Solicitation***

Below are the communication tools that can be considered appropriate during the open-solicitation award phase. Not all tools will be applied uniformly nor will one award be required to utilize each of these tools during the open-solicitation phase.

The discretion of the CO/AO and the technical team as well as the criteria described below should assist USAID employees in determining when to apply a certain tool to assist the partner community in better understanding a program plan or potential award.

### **Pre-Proposal Conferences**

Prior to a RFA/RFP closing for an open solicitation, USAID may hold a conference for interested industry regarding the open solicitation. Pre-proposal conferences are valuable



meetings with partners especially when a number of questions are received as a result of a RFP or RFA or when USAID has an opportunity to reach new partners within a specific sector.

These sessions typically will take place up to three to four weeks before a solicitation or application closes and will involve a USAID technical representative (COR/AOR), the CO or AO, and other relevant USAID officials. Many pre-proposal conferences will take place at the relevant USAID offices (Washington DC or overseas Mission) but USAID should utilize existing technology to conduct teleconferences, video conferences, or webinar sessions to include all participants—both local and overseas. All written materials must be placed online for all participants.

For any USAID unit hosting one of these conferences, USAID:

- Must provide Q&A from the session online upon closing period of official Q&A period.
- Must make every attempt to open the session to as broad an audience as possible.
- Should consider teleconference lines, video chats, and other relevant technology for use.
- Should provide in-advance knowledge to industry by at least a two-week period.

### ***Post Award***

Below are the communication tools that can be considered appropriate during the post-award phase. Not all tools will be applied uniformly nor will one award be required to utilize each of these tools in the post-award phase.

The discretion of the CO/AO and the technical team as well as the criteria described below should assist USAID employees in determining when to apply a certain tool to assist the partner community in better understanding a program plan or potential award.

### **USAID Debrief**

USAID is open to providing debriefs for any interested Offerors/Applicants after the close of an award. Under acquisition, CO/AOs, as well as CORs/AORs, must follow the Federal Acquisition Regulations (FAR) for providing debriefs and should utilize the USAID Debrief Checklist as reference. This checklist will be updated and provided online for USAID A&A staff. While debriefs are a regular practice under contract instruments, they are expected to be available under assistance awards as well. Refer to USAID ADS 303.3.7.2 for more information regarding debriefs under assistance awards.

The Agency views debriefs as an opportunity for Offerors/Applicants to learn and prepare for future USAID solicitations. A debrief may be provided in person, or via official letter,

teleconference or webinar. Debriefs are led by the appropriate USAID CO/AO and must follow Agency guidelines.

### **USAID Award Announcements**

USAID will post final award announcements on USG central websites, including FedBizOpps.gov and Grants.gov. The Agency must improve its timing on these announcements. For this reason, USAID is now exploring the most viable ways to assure that these posts are made within a reasonable period.

### **USAID Program Updates**

USAID regularly provides news to industry about USAID ongoing development programs via the USAID external webpages for headquarters as well as USAID Missions worldwide. These program updates are also provided during open session meetings and events as described in the General Interactions section of this Partner Outreach Communication Plan.

### **Partner Engagement Training for the USAID Workforce**

USAID will conduct specially-customized courses for USAID employees through newly revised training classes, thanks in part to USAID Forward reform initiatives. Market research, dos and don'ts for partner interactions, and working with new partners will all be covered through cost analysis, project design, source selection, and other updated coursework.

FAI training for CO/AOs, CO/AORs, Procurement Attorneys, and others involved in partner engagements will be available via a newly revised USG program. USAID will encourage participation in these updated sessions for the entire A&A workforce.

### **Implementation Plan: Building USAID Capacity to Achieve Improvements**

In order to successfully implement this plan, USAID will:

- Follow up with all Contracting and Agreement Officers by April 2012 to determine how the Partner Outreach Communication Plan is being implemented overseas and within Washington D.C.
- Work with technical colleagues in key meetings focused on educating them about these standards and expected procedures.
- Provide updated guidance materials for USAID staff to engage in vendor interactions during the pre-award, open solicitation, and post-award stages.
  - Build one-pagers stemming from the February 2, 2011 OMB Memorandum: *“Myth-Busting”: Addressing Misconceptions to Improve Communication with Industry during the Acquisition Process.*

- Review feedback provided by Washington D.C. and overseas staff and review number and level of events during FY 2012. USAID may use its current tracking platform, called Salesforce, to track individual meetings/sessions.

These tools will allow USAID to re-evaluate and update this plan at the end of Fiscal Year 2012 and every year thereafter in October/November.

### **Relevant References**

- FAR part 15: <https://www.acquisition.gov/far/html/FARTOCP15.html>
  - USAID ADS 202 and 200 series: [www.usaid.gov/policy/ads/200/](http://www.usaid.gov/policy/ads/200/)
  - USAID ADS 303 and 300 series: [www.usaid.gov/policy/ads/300/](http://www.usaid.gov/policy/ads/300/)
  - OMB “Myth-Busting”: Addressing Misconceptions to Improve Communication with Industry during the Acquisition Process, February 2, 2011: [www.whitehouse.gov/sites/default/files/omb/procurement/memo/Myth-Busting.pdf](http://www.whitehouse.gov/sites/default/files/omb/procurement/memo/Myth-Busting.pdf)
  - White House Paper, U.S. Chief Information Officer Plan, “25 Point Implementation Plan to Reform Federal Information Technology Management”: [www.cio.gov/documents/25-Point-Implementation-Plan-to-Reform-Federal%20IT.pdf](http://www.cio.gov/documents/25-Point-Implementation-Plan-to-Reform-Federal%20IT.pdf)
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### **Protection of Non-Public Information**

USAID, per U.S. federal regulations and standards, upholds its commitment to protect non-public information from inappropriate release or from unfair advantage for one vendor/partner over another. Non-public information includes the Agency’s source selection information and vendors’ confidential and proprietary information.

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