

FY2016 Business Forecast Quarter 2 Review Conference Call
Thursday, March 3rd, 2016
9:00AM-10:00AM

Background

USAID's Business Forecast is published each quarter throughout the fiscal year. The Agency's Business Forecast is an informational resource on potential funding and partnership opportunities at USAID. It is an advanced look at grants, contracts, and cooperative agreements that USAID is in the process of developing and plans to issue in the coming year. Two separate Forecasts are developed each quarter – one for USAID Missions overseas and one for USAID in Washington, DC. Organizations interested in working with USAID can use this tool to plan for proposal or application submissions.

USAID Participants

1. Roy Plucknett, USAID M/OAA Senior Procurement Executive
2. Crista Wise, USAID Ombudsman
3. Kimberly Ball, Deputy Director USAID Office of Small and Disadvantaged Business Utilization (OSDBU)
4. Michael Clark, USAID M/OAA DCHA Division Chief
5. Matthew Johnson, M/OAA Communications Director

Agenda

- Mr. Johnson kicks off call, introduces individuals in the room, and provides instructions for the call
- Mr. Plucknett provides introductory remarks.
- Ms. Wise provides introductory remarks.
- Mr. Johnson begins asking USAID participants questions submitted for the call.
- Conclusion of the call

Conference Call Transcript

Mr. Johnson remarks:

Good morning everyone and thank you joining us today. My name is Matt Johnson and I am the Communications Director for M/OAA.

Before we get started, I want to provide a few quick reminders for the call. We will be recording the call and posting it on our Business Forecast website shortly after the call is complete. We will send a notice to everyone through our e-mail list. We will be muting everyone during the call, but we ask that you please not put us on hold.

We are excited to be here, we have around 500 people who have RSVPed for the call this morning. We have a few folks in the room with us this morning who will be answering your questions. I'd like to briefly introduce the folks who will be speaking: Roy Plucknett, the new Director of M/OAA, Crista Wise, Agency's new Ombudsman, Kimberly Ball, Deputy Director of the Office of Small and Disadvantaged Business Utilization, Mike Clark, Division Chief for Democracy Conflict and Humanitarian Assistance Bureau based within M/OAA.

In total, we received around **240** questions and we appreciate all of the questions. We appreciate your continued interest in sending us questions each quarter. For today's call, similar to what we did last quarter, rather than going through all 240 questions which would probably take 6 or 7 hours, we will be taking about 25-30 minutes to highlight a few of the questions and major themes of questions that we received. Later today, we will be posting all of the questions and answers on our Business Forecast webpage.

I would like to note that this time around we did receive a number of non-Business Forecast related questions. For those questions, we will be working to provide responses in the coming days but will not include responses to those questions in the document that will be posted.

Thank you once again everyone for joining us today. I'd now like to now turn it over to Roy to give a few remarks brief remarks.

- Mr. Plucknett provides introductory remarks.

Mr. Plucknett Remarks:

Good morning. Welcome to our FY 2016, 2nd quarter Business Forecast call. Thank you so much for joining us this morning. I am excited to be with you on my first Business Forecast phone call.

As many of you know I joined USAID's Office of Acquisition and Assistance as the Director about three weeks ago, and I would like to thank everyone for the warm welcome.

I am not going to spend much time introducing myself this morning because next week I will be hosting an Ask the Procurement Executive conference call, where I will share a bit more about myself, my priorities as the new Director, as well as answer your questions.

I have been with USAID since 1993 serving in different posts around the world and most recently I served as the Deputy Mission Director in Afghanistan. I am sharing this because I want to you all to know that I have worked with hundreds of different implementing partners during my 20+ year career at USAID and I understand the importance of the Business Forecast not only to you, but also to the Agency.

I recognize that long before USAID issues a Notice of Funding Opportunity or a Request for Proposal, you are looking at the Forecast and making decisions about what activities for which you will compete. Your prep work in advance of us issuing a solicitation is an important part of the process. We know it includes the organization of your teams, brainstorming solutions, identifying who will work on your proposals, and so much more. We see all of the hard prep work that is poured into proposals and applications submitted to USAID, and we want to note that it greatly benefits the Agency. Without a timely and accurate Business Forecast, this would not be possible.

Over the last year, I understand that my office has done a lot of outreach and work to improve the Business Forecast. I want you to know that I am committed to continuing to improve the Business Forecast and the quarterly release schedule. In fact, next week I am meeting with my team to review the entire Business Forecast process to see where we can make additional improvements.

Once again, thank you for joining us and I hope you will join me next Thursday for my first Ask the Procurement Executive call.

- Mr. Johnson asks Ms. Wise to provide introductory comments

Ms. Wise Remarks:

Good morning, like Roy I am also excited to participate in my first Business Forecast phone call. As many of you know, I joined USAID as the Ombudsman in November. I have engaged many of you via the Ombudsman email address and in person during my initial meet and greet with the partner community. For those of you that I have not met in person, please reach out to me.

As the Ombudsman, my job is to ensure equitable treatment of all parties participating in any phase of the procurement process. The Business Forecast is important to me, because oftentimes many of the questions I receive are directly related to the Forecast. I understand the importance of posting an accurate, complete and timely forecast, but if this does not happen share your concerns with me and I will be glad to provide assistance.

- Mr. Johnson begins asking questions submitted for the call.

QUESTION FOR MS. BALL: Could you please share with us USAID's Small Business goals for FY 2016?

Ms. Ball Response: USAID/Washington and Mission small business prime contract goal for FY 2016 is 11 percent. I want to make a distinction between that number and the numbers which we have had in the past. I'm sure many of you know historically, those numbers, our small business goal, has only pertained to the acquisition obligations we make here in Washington. In FY16 for the very first time, it includes our field acquisition obligations as well. So, you will notice that the goal went down, but it went down because the number of acquisitions that we are dealing with went up tremendously. Again, that 11% is for both Washington and for the field for our prime awards. Our subcontracting goal is 20 percent. In terms of the socioeconomic categories, they remain consistent as they are statutory. Our Woman-Owned Small Business (WOSB) remains at 5%, our Small Disadvantaged Businesses (which includes Section 8(a) Program) remains at 5%, and the Service Disabled Veteran Owned Small Business (SDVOSB) and the Historically Underutilized Business (HUB) Zone Small Business both remain at 3%.

In addition to having our Agency-wide goals, we assign goals to our Bureaus that make acquisition obligations in excess of \$5million every year. So, every Bureau in Washington that spends more than \$5million in acquisitions has an internal goal as well. In addition to that, we set regional goals for the Missions to help us achieve and to socialize this change so that the Missions are aware that they are now required to contribute to the Agency's goals as well.

The information will be posted on USAID/OSDBU website shortly.

QUESTION FOR MS. BALL: Could you share your office's role in the Business Forecast and how you work to promote small businesses within USAID?

Ms. Ball Response: In terms of our role in the Business Forecast, we partner with M/OAA to make sure that the information provided is helpful to the small business community, and we have a number of our staff who participate in that process. One is Teneshia Alston who runs our goaling program and the other is Joe Terrazas who was formerly with M/OAA and joined our staff recently. We work with them quite closely and work with them to make sure issues and concerns are addressed. For example, we know that recurring issue is that frequently things are listed as "TBD" even when they are intended to be small business set-asides. We try to point out things like that -- questions which we believe you all are going to ask and of interest to you

to try to make the process a little more transparent for the small business community, and others of course. In terms of how do we promote small business internally within the Agency? I think there are a number of things that we do. Of course our office does a lot of training with our contracting and program officers so they know and understand the requirements of the small business program, and also the benefits to using our program. For anything that is done here in Washington, we have our small business review process which is required for any acquisition \$25K and above. We work closely with the Bureaus and COs to ensure that everything is looked at closely and determine whether there is an opportunity for small businesses to participate, whether as prime contractors or subcontractors. We have a training program where we have classes both in Washington and at the Missions to share information in detail. We also work with the policy shop on small business issues, for example one that we are currently working on with them is the subcontracting issue -- I know that many of you continue to have concerns about that process. While that is obviously something that is set legislatively, it is implemented in the FAR, there are things that as an Agency we feel that we can and should be doing to make the process a bit better for you -- so we are working on that, please stay tuned. In addition, we have done a bit of reorganizing with our staff. In addition to having staff focused on working with the Washington Bureaus, we have staff who are dedicated to working with the Missions and I am really excited to announce that we also have our first Foreign Service Officer working with us -- and we feel it has brought a great deal of knowledge to our office in terms of how the missions work and how it is best for us to engage them and expand the role of small businesses in the work that is done in the field. We have a lot of exciting new things going on -- we have a new contracting officer for our training program with a lot of knowledge about how the Agency and Missions work. We are really excited about everything that is happening now. One final note, Mauricio Vera, our Director, also works at the senior level to try to make sure that the other senior officials in the Agency are focused on the small business program as well. He is routinely providing training at that level and reporting out goals that I mentioned. We actually have a dashboard where we let the Bureaus know how they are doing -- it is a green, yellow, red concept. We also participate in some of the senior procurement reviews such as the AARAD process, which I am sure many of you are familiar with.

QUESTION FOR MS. BALL: What is the best way for folks to reach out to OSDDBU for questions or assistance?

Ms. Ball Response: Our main office number is 202-567-4730, but you can also go to our website. I don't think we have our Agency goals posted yet, but we will have them posted shortly. If you go to our site, you will also find a list of our staff and which Bureaus and Missions they represent, so if you are interested in a particular requirement, or working with a particular Bureau, there is a point of contact.

QUESTION FOR MR. PLUCKNETT: We have heard from a number of people how appreciative they are that Task Orders/Delivery Orders are being included on the Business Forecast. However, many note that the mechanism that is going to be used for the task order or delivery order is not provided. Can USAID please ensure that the mechanism is included in the Forecast?

MR. PLUCKNETT RESPONSE: Thank you for flagging this with us. As I mentioned earlier, we are meeting next week at headquarters to look at ways to streamline and continue to improve the information we provide to you folks. So, the suggestion to include the name of the set of IQCs that we will be issuing the task orders under, is something we will include in the next rounds. Thank you for that comment.

QUESTION FOR MR. PLUCKNETT: One partner noted that many anticipated activities have “to be determined” written in the award/action type column. A number of these activities are expected to be released sometime with the next month. With the award so close, shouldn’t USAID already have the choice of instrument well defined?

MR. PLUCKNETT RESPONSE: As you know, our Forecast is updated on a quarterly basis. It is important to remember that the Forecast is snapshot in time. Data for this Forecast was initially pulled in early January and revalidated a few days before releasing. But there is a lag between the time when data is entered, pulled, and posted -- which certainly contributes to the “TBD”.

In addition, we have instructed the COs to state “TBD” until the activity is better defined. At this point in the FY, I would hope that number would go down significantly, so that is one thing we will be looking at very closely when we sit down together next week. Moving forward, we will look for ways to work with our COs and AOs to see how we can improve in that area. Thank you for that comment.

QUESTION FOR MR. CLARK: We received a number of questions related to two awards within the Democracy, Conflict, and Humanitarian Assistance Bureau. I’d like to ask you a few questions.

First -- with regards to Active Communities Effective States or ACES. It is currently identified as as a “Small Business Reserve”. Can you please clarify what that means?

Mr. Clark Response: We are using the term “reserve” in situations where we anticipate multiple awards, where some of those awards are set-aside, but as a reserve for small business. The difference of it being a “reserve”, is the entire SOW will be the same for the small business awards as well as the unrestricted awards. The difference from a “set-aside” is that it is exclusive to small business, and a total set-aside is when a procurement, say it is multiple awards, would all go to small business. A partial set-aside is a scenario where you have a broad SOW and some part of that scope is separated out for small business awards. Again to restate, in the case of ACES, the “reserve” is some number of the multiple awards are intended to be for small business and the contract will be for the entire SOW. ACES is anticipated to be a multiple-award procurement with one or more awards reserved for small businesses. ACES is not expected to be a total or partial small business set-aside.

Do you anticipate releasing a draft SOW or pre-solicitation announcement for ACES prior to issuing the full solicitation?

Mr. Clark Response: USAID expects to issue a pre-solicitation notice on FedBizOpps prior to issuing the full solicitation.

As far as timing, do you think that ACES will be issued around April 1st?

Mr. Clark Response: The anticipated solicitation release date for ACES is an estimate and may be adjusted as necessitated by internal processes and requirements. It will be updated in the next forecast.

QUESTION FOR MR. CLARK: I'd like to now turn to now turn to the Analytical Services solicitation. Can you share what market research has been done for this award?

Mr. Clark Response: This is the fourth IDIQ for Analytical Services. In addition to historical information and information provided by Missions, USAID held an Industry Day in April 2015 and issued an RFI in July 2015. We have a lot of information behind this procurement.

Are small businesses going to be included in this award, if so how many do you anticipate?

Mr. Clark Response: I do not know the number of awards anticipated currently. This will be a total small business set-aside. This is a scenario where all of the awards will be given to small businesses because of historical information and prior usage of awards, and information from the RFI. There are a number of capable smalls to do this work, therefore it is set aside entirely.

As far as timing, the Forecast states that an RFP was to be issued on February 29th. Can you provide an updated timeline for this?

Mr. Clark Response: It was anticipated that the RFP would come out by that date, however, it will most likely be issued sometime later this month. It may roll into April, but we will try to get it out by end of March.

QUESTION FOR MS. WISE: One of the common questions we hear is that when Missions are missing from the Forecast partners do not know if they simply failed to provide input or they have no activities planned. What can USAID do to better communicate what is happening at Missions where no activities are planned?

One of the roles of my office is to help answer that question.

I understand that at times Missions have not been on the Forecast because they did not provide information in a timely manner. Other times Missions are not on the Forecast because they simply do not have any upcoming awards. As partners, you were not sure which was the case.

We are discussing internally how we can do a better job of communicating and tracking when a Mission does not have any upcoming awards. Within our Acquisition and Assistance planning

system, there is no easy way for us to valid if a Mission has no planned actions other than to manually check. We are discussing internally what we can do to solve this challenge.

While I don't have a perfect solution for this challenge at this time, I would encourage you to use me as a resource or use this conference call as a means of answering this question. If you are interested in knowing what is happening in a Mission, please feel free to reach out to me. I am happy to help verify what is happening in our Missions.

QUESTION FOR MS. WISE: With this in mind -- I want to ask you about a few Missions that were missing from the Business Forecast.

Are there any updates as to when we could expect to see procurement opportunities listed from Barbados back on the forecast? Several solicitations out of the mission no longer appear on the forecast, would USAID please provide updated timing? We continue to hear rumors that there are possible projects due for release.

At this moment there are no competitive opportunities from Barbados to add to the forecast. The "At-Risk Youth Program" which appeared on previous Forecasts was released as a task order.

QUESTION FOR MS. WISE: There are no opportunities listed for Georgia on the most recent forecast. Are new opportunities expected to be added to future forecasts?

There are currently no new planned opportunities in Georgia. However, once new opportunities are planned in Georgia, they will be added to future forecasts.

QUESTION FOR MS. WISE: Can you share any insight for Ghana? Are new opportunities expected to be added to future forecasts?

There are currently no opportunities in Ghana. New opportunities will be added to future forecasts as they become known.

QUESTION FOR MS. WISE: What about Namibia?

There are no new activities planned that will be added to future business forecasts for Namibia.

QUESTION FOR MS. WISE: Finally, can you share if there is anything planned for Nicaragua?

The Nicaragua Mission does not anticipate any upcoming opportunities for now.

ADDITIONAL CLOSING REMARKS

Mr. Plucknett: We do really appreciate your comments and suggestions for ways to improve the Business Forecast so you all receive the information you are looking for out of this process. Please keep feeding us suggestions and we will do our best to continue to improve.

Ms. Ball: I wanted to remind folks that our Annual Small Business Conference will be held on May 4th, 2016. Registration will be opening in mid-March so please be on the lookout for it on FedBizOpps. Stay tuned and RSVP as soon as you receive the invite. We look forward to seeing you there.

Mr. Johnson: One other reminder, we have one more call next week. Our Ask the Procurement Executive call next Thursday, March 10th. We will be sending out a reminder sometime tomorrow. Like I said earlier, we will be posting the full Q&A from this call, as well as the recording on our Business Forecast webpage. We will send a note to our email distribution list once everything is live.