



USAID
FROM THE AMERICAN PEOPLE

Partners' Day

December 1, 2015

The Role of USAID's Acquisition and Assistance Ombudsman

Business Forecast 101

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Panel Member Introductions

- **Diane A. Perone** - *Acting Ombudsman, USAID Bureau for Management, Office of Acquisition & Assistance*
- **Jami J. Rodgers** - *Acting Deputy Director Washington Operations, USAID Bureau for Management, Office of Acquisition & Assistance*
- **Sylvia Megret** - *Vice President of Business Development and Communications, University Research Co., LLC, Center for Human Services*
- **Kevin Murphy** - *President, J.E. Austin Associates, Inc.*

Role of the Ombudsman

The primary purpose of the Acquisition and Assistance (A&A) Ombudsman is to **ensure equitable treatment of all parties** participating in USAID's contracts and grants (acquisitions and assistance) pre-award, post-award, and administration functions.

Jurisdiction of the Ombudsman

On any aspects of the A&A process, the Ombudsman may:

- Conduct inquiries;
- Investigate, report findings, make recommendations;
- Develop, evaluate, and discuss available options
- Facilitate, negotiate, and mediate;
- Identify complaint patterns and trends;
- Educate; and
- Advocate on behalf of affected individuals or entities when appropriate.

Top Types of Ombudsman Inquiries

- Choice of Instrument
- Federal Acquisition Regulation (FAR) Creep into Assistance Processes
- Perceptions of Bias

Limitations of the Ombudsman

- Cannot compel or direct Agency or CO/AO action;
- Does not substitute for USAID's formal process;
- Does not substitute for providing the Agency with formal notice;
- Does not toll the time limitations for in the event of a protest, dispute, appeal, request for equitable adjustment, etc.; and
- Cannot make binding decisions or determine rights.

Partner Inquiry Parameters

- What is your complaint, issue, or concern?
- What redress do you seek?
- Who are the relevant parties?
- Have you spoken to the AO/CO?
- Do I have your permission to look into the matter?
- Do you require confidentiality?
- What are your time constraints?

For More Information

Please contact the USAID Acquisition and Assistance Ombudsman:

ombudsman@usaid.gov

Business Forecast 101

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Business Forecast Overview

- Serves as an informational resource on potential funding and partnership opportunities at USAID.
- Provides an advanced look at grants, contracts, task orders, and cooperative agreements that USAID is in the process of developing and plans to issue in the coming fiscal year.
- Represents a snapshot in time of USAID's planned programs and activities. When the snapshot is captured, each of these activities are in various stages of design and may change as a natural outcome of the design process.
- Balances the need to have information about future opportunities available as early as possible while still providing reliable information.

Generating the Business Forecast

- USAID uses an Acquisition and Assistance (A&A) Plan System generate the Forecast. The A&A Plan System is used across the Agency by leadership, program officers, and AOs/COs to capture and track planned A&A actions.
- Several days prior to the start of each quarter, USAID issues a notice to all AOs/COs to review and update A&A actions in the A&A Plan System.
- USAID generates a report of all A&A actions to be included on the Business Forecast which is reviewed in Washington, DC.
- Two separate forecasts are developed each quarter (USAID/Washington and USAID Missions).
- The Agency's Senior Procurement Executive conducts a final review before publication.

Types of Forecasted Opportunities

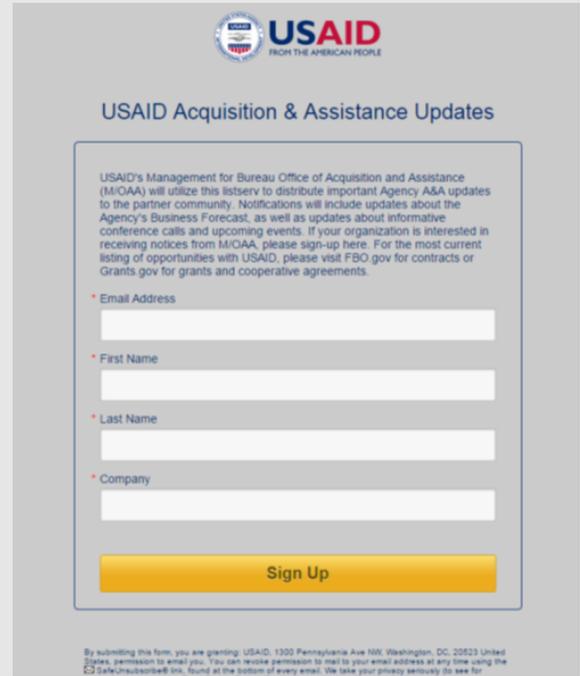
- Blanket Purchase Agreement (BPA)
- Collaborative Agreement
- Contract
- Cooperative Agreement
- Development Innovation Accelerator (DIA)
- Fixed Amount Award (FAA)
- Grant
- Indefinite Delivery/Indefinite Quantity (IDIQ) contract
- Leader with Associate Award (LWA)
- Personal Services Contract (PSC)
- Purchase Order
- GSA Task/Delivery Orders
- GSA BPA
- Activities To Be Determined (TBD)
- **IDIQ Task Orders**

Business Forecast Data Fields

- M/B/IO (Program Office)
- A&A Specialist
- Award Title
- Award Description
- Sector
- NAICS Code
- Total Estimated Cost/Amount Range
- Implementing Partner/Incumbent
- Award/Action Type
- Small Business Set-Aside
- Fiscal Year of Action
- Anticipated Award Date
- Anticipated Solicitation Release Date
- Award Length
- **Solicitation Number**
- **Business Forecast Status Change**

Staying Up-To-Date

- The Business Forecast is generated once a quarter.
- Within each quarter, minor modifications and updates are made.
- USAID has created an e-mail distribution list for individuals and organizations that are interested in receiving alerts when updates occur. (See top-right on Business Forecast page for sign-up.)
- Quarterly Conference Call with Q&A
- Twitter: @USAIDBizOpps



The image shows a sign-up form for USAID Acquisition & Assistance Updates. At the top left is the USAID logo with the text "FROM THE AMERICAN PEOPLE". The title of the form is "USAID Acquisition & Assistance Updates". Below the title is a paragraph of text explaining that USAID's Management for Bureau Office of Acquisition and Assistance (M/OAA) will use the list to distribute important Agency A&A updates, including the Business Forecast and conference calls. Below the text are four input fields: "Email Address", "First Name", "Last Name", and "Company". At the bottom of the form is a yellow "Sign Up" button. At the very bottom of the page, there is a small disclaimer: "By submitting this form, you are granting: USAID, 1300 Pennsylvania Ave NW, Washington, DC 20523 United States, permission to email you. You can revoke permission to mail to your email address at any time using the DataUnsubscribe@link, found at the bottom of every email. We take your privacy seriously. See for..."

For More Information

USAID Business Forecast:

<https://www.usaid.gov/work-usaid/get-grant-or-contract/business-forecast>

To inquire about a specific opportunity, please contact the A&A staff listed in the Business Forecast.

E-mail:

businessforecast@usaid.gov



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Kevin Murphy, President & Co-Founder of J.E. Austin

Small Businesses' Review and Usage of USAID's Business Forecast



How Do Small Businesses Use the Business Forecast?

Step One:
Developing
Company
Plan and
Strategy

Step Two:
Capture
Plan,
Prioritization
of Projects

**Business
Forecast
Released**

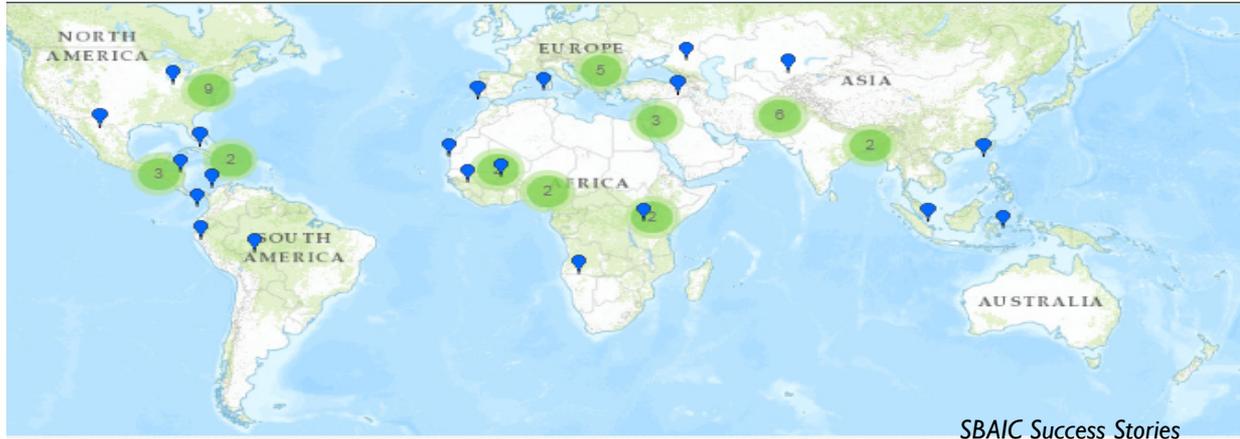
**Step
Three:**
Research
and
Interaction
with
Potential
Primes

**Step
Four:**
Pre-Sol,
Teams
Typically
Formed

**Step
Five:**
Finalizing
Proposal



Key Lessons on Usage



Planning Tool

- What to pursue?
- What to ask?
- Prime or Subcontract

Prioritization

- Functional and regional focus
- Choice of instrument
- Size and amount of budget

Increased Communication

- Spurs dialogue and interaction with list of prioritized prime contractors



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