

# Tips for Talking with USAID

- ❑ Meet with USAID early and often!
- ❑ Treat meetings with USAID as a courtesy call. We are visiting them to confirm information that is publicly available (e.g., from the procurement forecast); learn about current trends and/or policies; and provide information on who we are and what we do.
- ❑ If you are on recon, consider scheduling meetings with USAID toward the end of the trip, when you have something to say about the country, sector, and/or topic that is the focal point of the recon.
- ❑ Try to meet both Foreign Service Officer (FSO) and Foreign Service National (FSN) staff—also known as Cooperating Country Nationals (CCNs).
- ❑ Understand USAID’s planning and budget processes and timing, as these cycles impact both procurement timelines and staff availability.
- ❑ Recognize that USAID’s own training and guidance encourages outreach and discussions with implementing partners.
- ❑ Prepare:
  - ✓ **Know the USAID mission/bureau’s priorities** and ongoing efforts and come prepared to leverage that knowledge into a useful conversation—perhaps about a relevant tool or approach DAI is using that is applicable in this country/sector context.
  - ✓ **Understand who you are talking to** and their point of view. Be ready to calibrate every conversation to the interests of those in the room and be prepared with specific examples and anecdotes that might appeal to that individual.
  - ✓ **Understand the structural and political dynamics** in the mission/bureau. Most importantly, know the role of the person you are meeting with in terms of the mission/bureau hierarchy. Ensure that you recognize that mission staff and Washington staff do not always align in thinking about the direction of the mission or what is best in project design.
  - ✓ **Think about how you will introduce DAI** and handle each meeting. Have a succinct elevator speech to serve as an ice breaker. The pitch should build off DAI’s strengths (as defined by each setting) and hint of DAI’s aptitudes in defining/undertaking solutions.

## The Truth About “Procurement Sensitivity”

- Concern is about gathering information that is “competitively useful” - which may provide insights into USAID’s plans for the competition or learn a competitor’s strategies.
- It is in the government’s interest to meet with different implementers to exchange general information related to the acquisition, such as discussions about priorities, strategies, programs, etc.
- Government officials can meet one-on-one with potential offerors as long as no vendor receives preferential treatment.
- If information is shared that could directly affect proposal preparation, then it must be shared in a timely manner with all potential offerors.
- Once a contract action has been published in the business forecast, then the conversation must be confined to “general information” and providing “market research” information related to the acquisition.
- After issuance of solicitation (when the bid is “live”), all communications about that procurement must go through the CO. However, non-procurement communication is still allowed.
- When in doubt, check with your BDU/ Sector/ Regional VP and/or Mike Walsh.

- ✓ **Know DAI's portfolio** (country, sector) and approach to project management inside and out.
- ✓ **Prepare relevant materials**, such as DAI country timelines, sector-specific materials, relevant project summaries, etc.
- ✓ **Prepare thoughtful, focused questions.** Don't ask questions you can find the answer to online! Review your question list with your proposal team before your meeting.
- ✓ **Clearly articulate in your request for the meeting** what you would like to talk about in the upcoming meeting.

☐ Participate:

- ✓ **Ask good questions.** Don't forget that you are there to listen! Ask open-ended questions and follow-up questions. Formulate the questions in a way that demonstrates you've done your research. This shows respect for the person you are meeting with and can help them to engage with you.
- ✓ **Ask for references of other people with whom you should speak.** The person you are meeting with may even be able to make the introduction or set up the meeting for you.
- ✓ **Establish and convey trust** in DAI as an implementing partner.

**Example: a well-researched, open-ended question**

"I understand that your mission has partnered quite a bit with XX organization on behavior change communication, and that you have recently rolled out some very interesting media campaigns targeted toward girls and youth. Can you tell me about the initial response to that messaging and whether you think a similar campaign might be an effective tool in the context of YY program?"

☐ Say Thank You:

- ✓ **Send follow-up and thank you emails** to everyone you meet within a few days of the meeting.
- ✓ **Now that you are in contact, stay that way** by occasionally reaching out when you have something to share that would interest that person. Make an effort even (especially!) when you aren't asking for something in return.