

FY2017 Business Forecast Quarter 3 Review Conference Call
Tuesday, May 16, 2017
9:00-9:30AM

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. Mark Walther, USAID M/OAA Deputy Director of Washington Operations
2. Deborah Broderick, USAID M/OAA Deputy Director of ACTS
3. Kimberly Ball, Deputy Director, USAID Office of Small and Disadvantaged Business Utilization (OSDBU)
4. Charity Benson, Senior Advisor, M/OAA Washington Operations
5. Jami J. Rodgers, Division Chief, M/OAA Special Initiatives and Development Partners
6. Raphael Metzger, Senior Advisor, M/OAA Foreign Service
7. Rachel Chilton, M/OAA Communications Specialist

Agenda

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

Conference Call Transcript

Ms. Chilton remarks:

Good morning – or good afternoon and good evening depending on where you are joining us from around the world. Welcome to USAID’s FY17 Qtr 3 Business Forecast review call. My name is Rachel Chilton and I am a Communications Specialist for the Management Bureau’s Office of Acquisition and Assistance.

Thank you for taking the time to join us today.

For those of you that are new to this call, rather than going through all 200 plus questions that were submitted, we will be covering a number of the general questions, especially inquiries about our new live feed. The responses to all of the Q&A will be posted later today or sometime tomorrow once we have everything answered. We have most of the questions answered, but are still collecting a few from the field at this time.

Just a reminder, you are all muted and will not be able to speak. We are recording the call and will post the recording, as well as the transcript on our Business Forecast page along with the entire Q&A. Once everything has been posted, we will notify you through Twitter on our handle @USAIDBizOpps and our email distribution list.

I have a number of folks with me in the room today who I will let introduce themselves briefly --

- Mark Walther, Deputy Director of Operations for M/OAA
- Jami Rodgers, Division Chief, M/OAA Special Initiatives and Development Partners
- Charity Benson, Senior Advisor, M/OAA Washington Operations
- Deborah Broderick, USAID M/OAA Deputy Director of ACTS
- Raphael Metzger, Senior Advisor, M/OAA Foreign Service
- Kimberly Ball, Deputy Director, USAID Office of Small and Disadvantaged Business Utilization (OSDBU)

I would like to now turn the call over to Mark Walther to provide a few introductory remarks before we dive into the short Q&A. Again, a quick reminder -- we will only cover a small number of general questions during our time on the phone after Mark is done speaking. All 200 plus Q&A will be posted online later today for everyone to reference.

Mr. Walther remarks:

Thank you Rachel, and we greatly appreciate the questions and the input from the partners and the partner community. We really appreciate the interest you take in the Business Forecast. As

Rachel noted, we do want to take a few minutes here before we get into the Q&A themselves, to provide some updates.

As you will recall from the last quarterly callout, we moved our Business Forecast from a quarterly posting to a live feed. And with the live feed, it updates information every 24 hours as our A&A staff make changes internally. So, rather than waiting for updates each quarter from Agency personnel, you can see the latest Forecast information day in and day out as changes are made. We really appreciate the headway we have made in that area.

Just as an example of the interest in the Business Forecast -- since we have launched the live feed 3 ½ months ago it has been accessed more than 170,000 times. Again, that is more than 170,000 times over the last 3½ months. To compare this to our previous Forecast process -- all of last year our Business Forecast was downloaded 67,000 times. We appreciate the continued tremendous interest in the Forecast.

When we launched the Forecast live feed, we mentioned that we had additional features for the Forecast tool in the works. We really are excited about this past weekend and the number of enhancements that have now been further instituted to the Business Forecast. I'm just going to take a few minutes to highlight them so you have a better sense of the Forecast features.

The live feed Forecast now allows you to:

- Select multiple Operating Units/Missions, Sectors, Award Types, and more at the same time while searching by clicking on more than one checkbox in each category.
- The Operating Unit filter has been reorganized so all relevant offices fall under their assigned bureaus. If you click on the "E3 Bureau" Operating Unit box, for example, all of the offices within E3 will also be selected for your search unless you individually uncheck an office below.
- Similarly, overseas Operating Units (Missions/Countries) have been organized by region. Again, if you click on "Europe and Eurasia", for example, all countries operating in the region will be highlighted. You can also select country by country if you want to further isolate your search results.
- You can now filter by Small Business Set Aside, with options including:
 - N/A
 - Total set-aside
 - Partial set-aside
 - Small Disadvantaged Business set-aside
 - 8(a) set-aside
 - Veteran-owned set-aside

- Service-disabled Veteran set-aside
- Woman-owned set-aside
- HUBZone set-aside
- Small Business Reserve, and
- TBD
- We continue to work on our Small Business efforts. We know when we initially post some of that information may still be pending, and we are using “TBD”.
- But we have provided a number of other features that drill down on small business elements.
- We look forward to continued efforts in that field.
- The tool now has a calendar from which you can search for anticipated Solicitation and Award Dates within a range of days.
- There is a calendar pop-up to assist you with picking date ranges for anticipated solicitation and award dates.
- We have also improved the downloadable Forecast.
- You will now have two options to download the Forecast -- you can download the entire Forecast or you can download your specific search results.
- Additionally, when you download the Forecast it will be organized alphabetically by Operating Unit/Mission country, so I think you’ll enjoy that structure.

Again, I want to note that when you’re searching the Business Forecast, you can still search and download ALL opportunities at once. When you are on the Business Forecast live feed search screen, simply click on “search” without selecting any checkboxes or drop down options on any of the filter options. Leave all fields blank and when you click on search, all available opportunities will appear.

Just one final update on contact information about Mission personnel -- it has not previously been included in our Staff Directory. You can now search the name of any individual in our Staff Directory -- both in Washington and Overseas -- and you’ll get their corresponding email address. As long as you have the POC through the Business Forecast or solicitation information. Anytime information is missing on the Business Forecast or anywhere else, you can obtain their email address from our Staff Directory at: www.usaid.gov/staff-directory or by clicking on the Staff Directory link under the “Forecast Resources” section of our Business Forecast page. Again, we are really excited about these improvements of the live feed. We really do appreciate and welcome your feedback and ideas as we continue to move forward.

I want to reiterate just as a practical matter, both for you, the partner community, as well as for us internally, the live feed is still a relatively new feature and these current enhancements. We

continue to work internally, as well as look at the feedback you submit, to make sure people understand the process, to make sure people are more actively engaged on the process, and want to be sure we respond to any questions that may come up. If you have questions, comments, suggestions, or any other kind of feedback, please email our team at: BusinessForecast@usaid.gov -- at any point during the process. If you have any questions in regards to specific information or new features, please reach out.

Again, we really do appreciate your continued interest and for joining the call today. We just can't thank you enough. And can't thank enough for the team here with all of the different enhancements that have been made. We continue to welcome your engagement and collaboration as we move forward.

Ms. Chilton

Great -- thanks, Mark. I would like to now turn the call over to Kimberly Ball who is the Deputy Director of USAID's Office of Small and Disadvantaged Business Utilization.

Ms. Ball

Thank you and good morning. First I want to say thank you to Mark and his team for all of the tremendous work that they have done on the Business Forecast. We often hear from the Small Business community that it is a model for business forecasts across the government, and we have had small businesses recommend to other agencies that they take a look at what were are doing here at USAID as an example of what is possible.

We are really excited about the Small Business search feature and the Staff Directory. We feel like these things help make it more transparent and make it easier for Small Business communities to engage so thank you for that.

Thank you also for allowing me this opportunity to announce our next Small Business Conference which will be held on June 28th. The event will be announced on FedBizOpps.gov and registration should open later this week. If you take a look at FBO.gov right now, you'll see information about the conference and our awards ceremony. As in previous years, we will be holding an award ceremony. But what will be different this year, is that 1) we have a couple of new categories, and 2) we are actually following a nomination process instead of making the decisions here internally, we are going to open it up to you to nominate those organizations who you feel should be recognized as a "Small Business of the Year", "CO of the Year", "COR of the Year", etc. We really want to hear from you in terms of what we're doing right, and who's really excelling at that. I would encourage you to take a look at FedBizOpps.gov. The nomination information is out right now, and again registration should open later this week.

Ms. Chilton

Thank you, Kimberly. We will now jump to the Q&A portion of the call. This is going to be a short call today as we have less than ten questions to cover during our remaining time on the phone. I do want to take a moment to reiterate the purpose of this quarterly call. We will only be answering questions directly related to the Agency's Business Forecast.

Business Forecast Q&A:

1. **Cancelled Opportunities:** For how long do opportunities whose status is changed to "Cancelled" remain in the Business Forecast database, so that they can be identified by filtering using the "Forecast Status Change" field?
USAID Response: We have advised AOs/COs that if they cancel an opportunity, it should remain on the Forecast for one quarter for the partners to reference. Please note that we continue to message this out to all of our staff.
2. **Forecast Download Sheet:** When downloading the Washington and Mission Forecast in XLS format, would it be possible to have the updated file format in alphabetical order by country/region?
USAID Response: As Mark stated earlier in the call during his remarks, the format of the downloadable excel version of the Forecast has been updated. You can now download the entire list of opportunities available, as well as your individual search options. All spreadsheets are broken down into Washington and Overseas opportunities, and then further alphabetized by Operating Unit or Country/Mission.
3. **Small Business Set Aside Filter:** Although the downloadable Excel version of the forecast includes a column titled "Small Business Set Aside", the live internet version of the forecast is not searchable by this field. Is this a feature that will be added to the live feed?
USAID Response: Yes, we noted that this important feature was missing from the live feed when it was launched. I am happy to share that as of this weekend, you can now search by small business set asides. As Mark noted, you can now filter by Small Business Set Aside, with options including:
 - N/A
 - Total set-aside
 - Partial set-aside
 - Small Disadvantaged Business set-aside
 - 8(a) set-aside
 - Veteran-owned set-aside
 - Service-disabled Veteran set-aside
 - Woman-owned set-aside
 - HUBZone set-aside
 - Small Business Reserve, and

- Or if a Set-Aside decision is pending, TBD

4. **Updating the Forecast:** The live feed is a new and useful format for the Forecast, however many opportunities have release dates that have lapsed or lingered without updates. When release dates have lapsed, should organizations assume that the procurement has been delayed or interrupted? If that is the case, can USAID include such information in the Forecast?

USAID Response: It is important to note that solicitation date is an “Anticipated” date. When the date has passed it can be indicative of a number of items -- that the opportunity is currently open and has not closed, or that it may be delayed, or that an Activity that would be implemented through an A&A award is anticipated, but is still in design/planning. If you have questions about a specific opportunity on a date that has passed, we recommend reaching out to the A&A Point of Contact listed in the solicitation or the Business Forecast. We also have enhanced our website to include the email directory for the POC! You can also e-mail BusinessForecast@usaid.gov with questions.

5. **Cooperative Agreement POCs:** Is there a website or online resource that the general public can access to find out which organization has been awarded a specific cooperative agreement? USAID will often post Award Notices for contracts in FedBizOpps.com but Award Notices are not posted for cooperative agreements on Grants.gov. Is there a way to find out this information without having to email the POC each time?

USAID Response: The public can search www.USASpending.gov to view both acquisition and assistance awards. The Advanced Search feature allows you to search by Recipient Name, DUNS Number, or other keywords. See <https://www.usaspending.gov/Pages/AdvancedSearch.aspx>

6. **Task Orders on Forecast:** Can USAID clarify whether Task Orders will be appearing on the live forecast? We had understood from previous quarterly Questions and Answers that they would, but some missions have indicated that they are not required to post Task Orders on the live forecast.

USAID Response: Yes, Task Orders are included on the Business Forecast. They have been included for the last year and half.

If a Mission is telling you that task orders should not be included, please flag this to our BusinessForecast@usaid.gov email address.

7. **Information Missing from Forecast:** This past quarter we noticed that a number of opportunities disappeared from the Forecast en masse, only to appear a few days later. Can you share what happened?

USAID Response: In mid-April while making backend updates and testing new features of the Business Forecast, we noticed an issue where approximately 100 activities

dropped off of the Live Feed. We addressed the issue as soon as it was noticed. This should not happen again.

- 8. Extensions on Forecast:** If a solicitation is in the final stages of the procurement cycle, competitive range determination, will any extensions or changes show up in the live feed or on FedBizOpps?

USAID Response: For the Live Feed, once a solicitation closes there are no further updates to the Business Forecast.

Similarly on FBO.gov, once the solicitation closes, the CO generally does not post a public notice again until an award notice at the end of the process; however, there could be an instance where a CO may post an update to FedBizOpps. Any communications after proposal receipt through award (e.g., comp. range, discussions) are typically held with the offerors directly without any public notices.

Closing Remarks from Ms. Chilton

Once again, we only covered a few of our questions. We will be posting a full Q&A, along with our transcript and recording of the call, hopefully later today once we have the remaining questions answered. Thank you again for joining us. I'm going to hand the call back over to Mark Walther to provide a few closing remarks.

Closing Remarks by Mr. Walther

Thanks again, Rachel and thanks to each and every one of you. As Rachel noted at the beginning, we'll be posting the responses to your questions likely later this afternoon and we really do appreciate the interest and clarifications you are seeking -- whether they are on particular announcements, or features and aspects related to the Business Forecast.

We do realize, and we have received a lot of questions such as "we have other questions beside the Business Forecast", and it's been some time since we have held an Ask the Procurement Executive call. We are almost going on a year I believe. We are going to target an Ask the Procurement Executive call for this July. We will go out in advance in the call to all of the partner associations to obtain the top 10-15 questions amongst the partner community and make sure we have a dedicated call to the Ask the Procurement Executive. So a number of your other questions that come up from time-to-time, we can answer in a more structured way. We might look at doing this call semi-annually and perhaps in coordination with the Business Forecast call. We are very happy to note that questions for the Forecast call are becoming more easy to manage, that's why these calls are much shorter in nature as we have held them over the years. We do also appreciate, so you realize, there is a lot of work that goes into answering the questions that come in each quarter, both tasking them out to the Field and here in Washington. We want to make sure there are quality responses. We also realize that when we do the Ask the Procurement Executive and other outreach, we do a lot of homework to ensure all responses are appropriate. Again, we appreciate your interest. Thanks to everyone for helping to answer the questions and the worldwide effort to make this informative and helpful to everyone. Try out the new features and let us know how they're working!