

FY2017 Business Forecast Quarter 2 Review Conference Call
Tuesday, March 7, 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 Operations
2. Teneshia Alston, Senior Program Manager, USAID Office of Small and Disadvantaged Business Utilization (OSDBU)
3. Charity Benson, Senior Advisor, M/OAA Washington Operations
4. Jami J. Rodgers, Division Chief, M/OAA Special Initiatives and Development Partners
5. 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. Alston provides small business 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 2 Business Forecast review call. My name is Rachel Chilton and I am on the communications team within the Management Bureau’s Office of Acquisition and Assistance.

Thank you for taking the time to join us today. Today we are anticipating nearly 300 people on the line. This quarter we received between 200-250 questions related to our Business Forecast. We are happy to see that the nature of the questions submitted has changed since the launch of our live feed tool. In general, we did not receive too many inquiries to verify information that is out of date.

For those of you that are new to this call, rather than going through all 200 plus questions, 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. We will notify you through twitter on our handle @USAIDBizOpps and our e-mail distribution list once everything has been posted.

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
- Teneshia Alston, Senior Program Manager, USAID Office of Small and Disadvantaged Business Utilization (OSDBU),
- Charity Benson, Senior Advisor, M/OAA Washington Operations

I would like to now turn the call over to Mark Walther to provide a few introductory remarks before we dive into the Q&A that was submitted.

Mr. Walther remarks:

Thank you Rachel and thank you to everyone that has joined us for our call and submitted questions. We really appreciate the continued interest in our Business Forecast and really do welcome your regular feedback on how we can improve our communication both with the Forecast and other areas.

As Rachel said, today we are going to spend about 10 or 15 minutes this morning highlighting some of the overall questions to give you a flavor of them.

But first, I'd like to highlight a couple of things before going into the Q&A session.

During last quarter's call, I mentioned that we were in the process of compiling our annual progress report. The report was released in early February and was distributed through our email lists and was posted on USAID.gov.

I would like to take a moment to quickly highlight a few areas.

- The preliminary data indicates the Agency awarded approximately 13 percent of its contracts to small businesses worldwide.
- On the Washington front -- More than 23% of the Washington-based contracts were awarded to U.S. based small businesses, which is the most the Agency has ever done;
- We also reported that 88.3% of all contracts had a past performance evaluation complete;
- We also established Acquisition and Assistance Labs both here in Washington and in regional missions overseas. Our A&A Labs are helping to advance the Agency's mission through workforce development and the testing and scaling of innovations in acquisition and assistance, and;
- During the course of last year we posted a number materials on our external website for partners to utilize, including:
 - Procurement Executive Bulletins (also known as PEBs)
 - USAID's Indefinite Deliver, Indefinite Quantity (IDIQ) list
 - Broad Agency Announcement (BAA) guidance
 - Indirect Cost Rate (NICRA) for Nonprofit Organizations
 - New online trainings for How to Work with USAID

I encourage you all to take time to read through the progress report. You can access our report through our website by navigating to: "Work with USAID", then click on "Resources for

Partners”, and finally clicking on “[Progress Report](#)”. If you have questions about the report or how to locate information in regards to our office, please email our Communications Team at: m.oaa.comms@usaid.gov.

Next I would like to turn now to the Agency’s Business Forecast. As you are all aware, we officially launched our Business Forecast live feed function on January 31st. It goes without saying, we are very excited about the new tool and the way we do business now with the Live Feed.

It allows USAID staff to update information daily. Rather than waiting for updates each quarter from the Agency, you can see the latest Forecast information as our contracting and agreement officers worldwide update on a daily basis. You may have noticed a flurry of activity over the last week as staff have been answering your questions, they have been making updates to the Business Forecast that correspond to your inquiries. In fact, more than 70 opportunities have been updated over the last week.

The live feed has a lot of useful new features such as:

- You can now identify and sort by the date when an activity was last updated;
- You can filter Forecast data by a number of categories including: by Mission or Operating Unit, Sector, Forecast Status Change, Award Type, and more;
- And finally, there is still an option for you to download the entire Forecast (both Mission and Washington together).

I would also like to take the opportunity to highlight additional update within the Business Forecast live feed we are developing. In the next month or so we will be adding capabilities such as the ability to:

- Filter by Small Business Set aside;
- Select multiple Operating Units/Missions, Sectors, and Award Types when searching; and,
- Search for Solicitation and Award Dates within a range of days.

We are continuing to work with our colleagues in the Management Bureau’s Chief Information Officer (M/CIO). We will continue to update you on our progress.

I want to thank everyone who provided feedback and suggestions for the live feed to our team. We have taken all of your suggestions and have shared them with our technical team to see if and how they can be incorporated into the new live feed. We definitely value your insight and want to ensure the live feed is as useful as possible. We continue to welcome your ideas.

One final note before we move into the Q&A. As with the launch of any new system, there will be a learning curve, both internally and externally. Internally, with the launch of the new live feed, we developed new guidance for all A&A professionals on when and how they should make updates to opportunities. Our team hosted various webinars and produced a fact sheet to walk staff through the new live feed. We recognize that this is a major business process change for us, but we believe it is an important change as it will give all of you the most up-to-date information on procurements.

Again, thank you for your continued interest and for joining the call today.

Ms. Chilton:

Great -- thank you, Mark! I'd now like to turn it over to Teneshia for some small business updates.

Ms. Alston remarks:

On behalf of Mauricio Vera, the Director of the Small Business Office, we would like to thank Mark and the entire Management Bureau team for providing us with this opportunity to present this morning.

As you have heard, USAID made great strides in several areas, including awarding approximately 13 percent of the Agency's contracts to U.S.-based small businesses worldwide. The preliminary data indicates that in fiscal year (FY) 2016 the Agency awarded approximately \$431M domestically and approximately \$554M worldwide. We attribute this increase to a number of Agency-wide actions. We have increased outreach activities to educate our partners and we have increased training to educate our technical and contracting officials. In FY 2016 the Office of Small and Disadvantaged Business Utilization (OSDBU) hosted training sessions in Washington, DC and at the Honduras, Guatemala and El Salvador Missions. During the training sessions we explain the small business program and the benefits of using it; highlight success stories of small business partners within the Agency; and provide instruction on conducting market research, the subcontracting program and a myriad of other small business related topics.

This past November OSDBU partnered with M/OAA to host the Agency's first international small business conference in Boksburg, South Africa. More than 300 U.S. small business representatives attended the conference. We believe that events like this one will contribute to meeting our 11.5 percent small business goal for FY 2017. On June 28th we will host the Agency's Tenth Annual Small Business Conference (ASBC) in Washington, DC. As in the past,

senior leadership throughout the Agency will participate in the event. Registration will be posted via the Federal Business Opportunities website approximately 60 days prior to the event. A special thanks to those who have participated in our activities and provided constructive feedback.

Before I close, I would like to say that we are very excited about the new live update feature of the agency's Business Forecast. We believe the information provided will be useful to small businesses and all of our implementing partners. We will continue to work closely with the Management Bureau to ensure that the Business Forecast information provided is helpful to the all of our partners. Thank you.

Ms. Chilton:

Great -- thank you, Teneshia. We are now going to jump into our Q&A portion of the call. I believe we are going to cover 12-13 questions today.

Business Forecast Q&A:

General Business Forecast Questions

1. **[CHARITY] Guidelines for Posting Opportunities:** What are USAID's guidelines for posting solicitations on the Business Forecast, FedBizOpps.gov, Grants.gov, and Mission websites?

USAID Response: The ADS requires actions over \$150,000 to be included on the Business Forecast. However, in our guidance to Contracting and Agreement officers we encourage all awards, regardless of the dollar amount, to be included in the Business Forecast. This is a best practice that we continue to communicate to our staff.

The FAR requires solicitations that are over \$25,000 on FBO.gov. For actions that are over \$15,000, but under \$25,000 they are required to be posted in a public place for no less than 10 days. The FAR does not provide specifics on where they must be posted. In these circumstances how they get posted can vary. They can be published in local newspapers, on the Embassy/USAID website, or on FedBizOpps.gov.

2. **[JAMI] Business Forecast Status Change:** It does not appear that this field changes accordingly to actual changes on the Forecast. Can you please explain this field? Can operating units be further encouraged to update the Status Change information each time they modify a record?

USAID Response: This field was created to prior to the Live Feed Forecast to communicate from quarter to quarter updates or changes that have been made in the Forecast. With the new Live Feed and the Last Updated field, the Business Forecast Status Change may need to be revisited. In the meantime, we will continue to encourage operating units to keep this field updated.
3. **[JAMI] New Opportunity Not Previously Forecasted:** What period of time does the “New Opportunity Not Previously Forecasted” refer to? Not previously forecasted from the prior quarter? Many opportunities are listed as New Opportunities, however they’ve been on the Forecast for multiple quarters. Is it possible for USAID to add or provide visibility into a “Created Date” field, so that we can more easily confirm whether or not an opportunity is truly new?

USAID Response: This option was created prior to the launch of the new Live Feed. Prior to the Live Feed this status was used to identify opportunities that were not included in the previous quarter's Forecast. Given the shift to “live” updates it is still being used to show new opportunities over the last quarter, though the opportunity may not be new if the user is conducting a daily check. The new feature of “Last Modified” date has been added to help our partners identify updates.
4. **[JAMI] Local Opportunities:** Does USAID plan to include indications on the forecast if a procurement will be locally restricted?

USAID Response: USAID is reviewing the feasibility of this enhancement to specifically identify local competitions on the Business Forecast.
5. **[JAMI] Requests for Task Order Proposals (RFTOPs) on FBO.gov:** We greatly appreciate that USAID is now including Task Orders in the Business Forecast. Would it also be possible to post the RFTOPs on FBO or on the USAID website so they can be viewed by all organizations and not just the IDIQ prime implementers? We realize that bidding is restricted to the prime IDIQ holders, but the RFTOPs still contain valuable information for all organizations that work in, or hope to work in that country and/or sector.

USAID Response: USAID does not plan on posting RFTOPs on FBO.gov or on USAID.gov. Federal Acquisition Regulation (FAR) Part 5--Publicizing Contract Actions specifically excludes orders placed under FAR Part 16.5--Indefinite-Delivery contracts and it is not USAID’s intent to go beyond these requirements.
6. **[CHARITY] Excel Version of Business Forecast:** Can USAID please confirm that the Excel version of the Business Forecast is inclusive of all opportunities on the searchable live Business Forecast for Missions and Washington, and that it is updated at the same time as the live forecast?

USAID Response: Yes, the Excel version of the Forecast is updated at the same time as the live feed. If you download the Excel version of Business Forecast you will be downloading all of the information available through the Live Feed search tool.

7. **[CHARITY] Updates to Live Feed:** Could USAID please provide more information on how forecasted opportunities are updated in the live business forecast feed? At the time of submission, a number of forecasted opportunities have not been updated in the live feed since December 2016. What steps will USAID take to ensure forecasted opportunities are updated in a timely fashion or reflect any changes made, particularly in relation to submission dates which have passed? Can you please clarify how often the forecast is expected to be updated?

USAID Response: Opportunities are updated daily in the Business Forecast based on information derived from the Agency's Acquisition and Assistance (A&A) Plan. USAID asks Agreement/Contracting Officers and program/technical staff to make relevant updates as soon as possible so this information can be made available to the public. Any discrepancies in dates should be brought to the attention of the POC listed in the forecast. USAID will continue to take quarterly snapshots to manage the data and archive information as needed.

8. **[JAMI] Incumbent:** In the new live feed forecast, information about the 'incumbent' seems to be missing. Following the previous Q&A, we understood that USAID would continue to provide this information (with reference to the 'incumbent' rather than the 'implementing partner'). What is the difference between N/A and TBD? Does TBD mean there is an incumbent for that project already and they are determining if they will get another phase funded or does it mean something else such as sole source? Or are N/A and TBD essentially the same?

USAID Response: These are essentially the same, in that the planned action is a new requirement and there is no incumbent to list. We will work to streamline responses to N/A. Incumbents will be listed when they are available. It is important to note that the Business Forecast only includes planned competitive activities, so sole source procurements will not be listed.

9. **[CHARITY] Feedback on Live Feed:** Is USAID planning on conducting any user surveys or providing any mechanisms for feedback and suggestions for the new system?

USAID Response: USAID welcomes feedback on the new Live Feed at anytime. Many organizations have been actively sharing feedback and suggestions to the Agency. We have been taking all of the suggestions and working with our technical colleagues for possible enhancements to the system. If you have comments on the new tool, you can send them to businessforecast@usaid.gov.

10. **[CHARITY] Notifications from Live Forecast:** Is it possible for USAID to add a feature that allows you to receive alerts or updates when opportunities have been updated?

USAID Response: We appreciate this suggestion. We have shared this request with our

technical team. They are currently looking into the feasibility of creating alert features on the Live Feed. Over the next quarter we will try to scope out the feasibility of the requirement and will share with you a status update on our next call.

11. [CHARITY] Improving Search Features on Live Feed: Can USAID add the capabilities to be able to search by more than one operating unit, by a ranges of dates, etc.?

USAID Response: This is a capability that we identified before rolling out that we wanted to add to the Live Feed. As Mark mentioned, we are working to add these features to the Live Feed. We are hopeful that sometime in the next month or so this will be included on the Forecast.

12. [JAMI] Removing Opportunities from the Forecast: Could USAID ensure that opportunities that are no longer available are removed from the forecast as well, for ease of comprehension?

USAID Response: Yes, we will continue to reinforce this message to operating units to update the status of their planned actions as they progress through the pre-award process so that closed opportunities do not appear on the Forecast.

13. [JAMI] Last Modified Date: Does this date change when data is updated in fields that are not publically visible on the Forecast?

USAID Response: Correct. The updated date changes anytime a record is edited and saved in the A&A Plan. While you may not see updates/changes that have been made on the Forecast, you can view the last modified date as a verification that information has recently been reviewed and verified.

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 to provide a few closing remarks.

Closing Remarks by Mr. Walther

I add my thanks to Rachel and others. We really appreciate your interest. As Rachel noted that we are working to get the responses to your questions posted by the end of the day. We hope you find it responsive to all of your questions.

Final note, as some of you know, we are still exploring timelines and structures for a Partners' Day in the spring. We are working in conjunction with the Management Bureau. We will keep you posted on the details.

Thanks to everyone for helping to answer the questions and the worldwide effort to make this informative and helpful to everyone.