



***US Department of Defense
Office of Small Business Programs
2018 Small Business Training Week***

Telling Stories and Answering Common Questions using Data

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Agenda

- **FPDS: Intro**
- **Small Business Specialist Scenarios**
- **Other Standard Reports**
- **Questions and Answers**





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FPDS IS:

An automated system used to collect and report on federal procurement spending

The single authoritative repository for federal procurement award data



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FPDS: Why it's there

FPDS provides a comprehensive web-based tool for agencies to report contract actions. The resulting data provides—

“...a means of measuring and assessing the effect of Federal contracting on the Nation's economy and the extent to which small, veteran-owned small, service-disabled veteran-owned small, HUBZone small, small disadvantaged, women-owned small business concerns, and AbilityOne nonprofit agencies operating under 41 U.S.C chapter 85, Committee for Purchase from People Who Are Blind or Severely Disabled, are sharing in Federal contracts”

-FAR 4.602(a)(2)



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Small Business Specialist Scenario

Bad responses

- **"Pretty well."**
- **"Not bad."**
- **"About like last year."**
- **"I don't know."**
- **"The quarterly report isn't due for another two months."**
 - **"Nobody sent me the numbers yet."**
 - **"Who wants to know?"**
 - **"I'll ask the data person."**





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Small Business Specialist Scenario

**Good responses provide data to help
your senior leader make informed
business judgments.**

- 1. Achievements**
- 2. Achievements v Goals**
- 3. Achievements Year-over-Year**
- 4. Projected achievements at EOFY**
- 5. SB \$ Year-over-Year**





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Small Business Specialist Scenario

- **Achievements**
 - **The single most important report for the Small Business Program at levels below the Departmental level is the:**
 - **Small Business Achievements by Awarding Organization Report**
 - **You need to be able to run this report consistently and report its results**
 - **“Ma’am, as of today’s report, 49.5% of our Total Small Business Eligible Dollars have been awarded to Small Business.”**





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Small Business Specialist Scenario

- **Achievements v. Goals**
 - **Sources:**
 - **Small Business Achievements by Awarding Organization Report**
 - **Goal assignment memorandum**
 - **Typical Output: Columnar chart**
 - **"Sir, The attached chart shows, as of today, we are meeting all five assigned goals."**

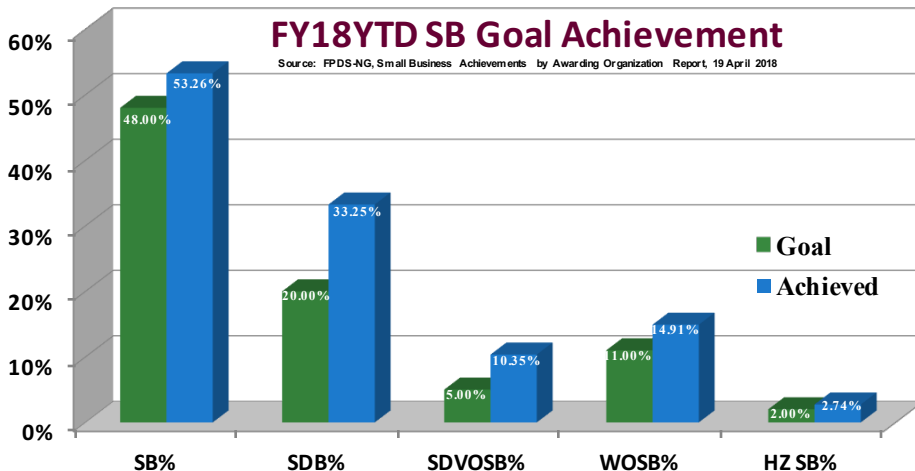




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Small Business Specialist Scenario

• Achievement v. Goals





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Small Business Specialist Scenario

- **Achievement Year-over-Year**
 - **Sources:**
 - **Small Business Achievements by Awarding Organization Report**
 - **Output: Line chart**
 - **“Sir, The attached chart shows, as of today, we are ahead of last year’s same day Small Business percent achievement by 661 basis points.”**

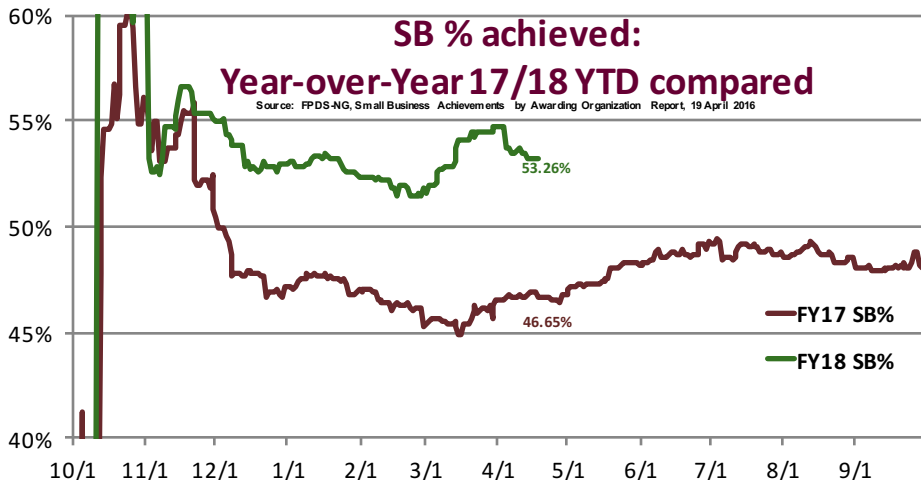




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Small Business Specialist Scenario

- Achievement Year-over-Year**





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Small Business Specialist Scenario

- **Projected Achievement at EOFY**
 - **Sources:**
 - **Small Business Achievements by Awarding Organization Report**
 - **04/19/2017-04/18/2018**
 - **Output: Columnar chart with explanatory notes**
 - **“Ma’am, The attached chart shows, as of today, we are projecting to meet five of our five assigned goals.”**

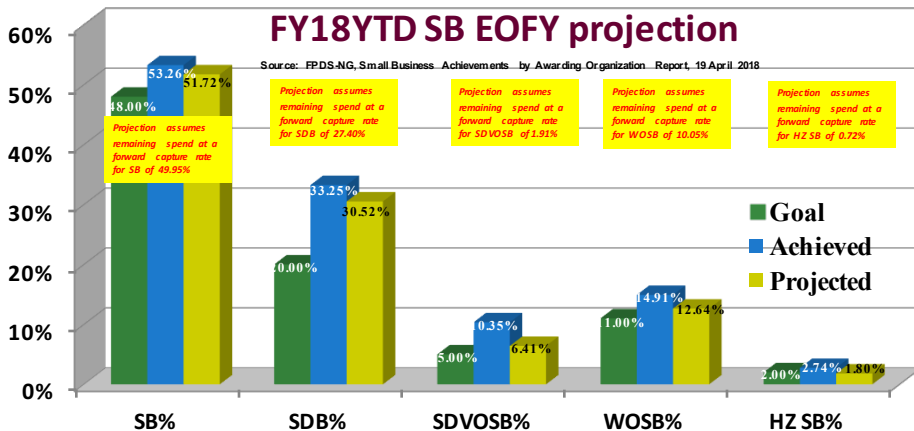




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Small Business Specialist Scenario

- Projected Achievement at EOFY**



For SB%: FY18YTD spend + FY17 (04/19/17-09/30/17) spend at a forward SB capture rate of 49.95%



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Small Business Specialist Scenario

- **Small Business Dollars Year-over-Year**
 - **Sources:**
 - **Small Business Achievements by Awarding Organization Report**
 - **Output: Line chart**
 - **"Sir, our current spend line shows we are leading last year's Small Business dollars same day by roughly \$33m."**

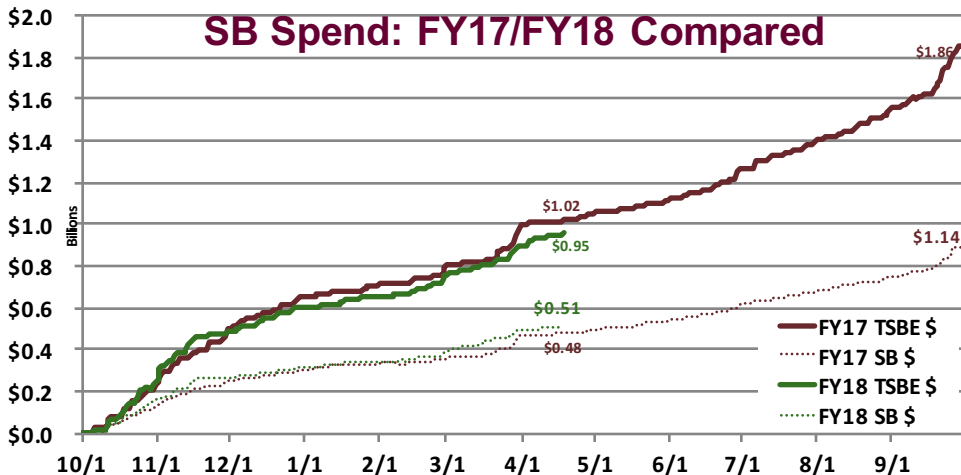




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Small Business Specialist Scenario

- **Small Business Dollars Year-over-Year**





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Small Business Specialist Scenario

- **Total Small Business Eligible \$**
- **ANSWER:** “Total Small Business eligible dollars equals all obligation MINUS obligation subject to the goaling exclusions.”
- **OFFICIAL FPDS-NG definition of TSBE\$:** “Total Small Business Eligible Dollars: This column is an aggregation of Dollars Obligated, after exclusions are applied.”





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Small Business Specialist Scenario

- **Goaling Exclusions**
- **ANSWER: “Categories of contracts that are reported to FPDS-NG for statistical purposes, but are not part of the Small Business Base. Each category has an explanation indicating why it is excluded. The SBA provides information on exclusions from the goaling baseline in its ‘Goaling Guidelines.’ The Goaling Guidelines are the only official source of instruction available to participating agencies on exclusions to the small business goaling baseline.”**





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Small Business Specialist Scenario

- **Goaling Exclusions**
- **ANSWER (continued):**
- ***See “Goaling Guidelines for the Small Business Preference Programs for Prime and Subcontract Federal Procurement Goals & Achievements, July 3, 2003.”***
- ***See also 11/18/2015 memo from the House Small Business Committee staff***
- ***See also FPDS-NG Small Business Achievements by Awarding Organization Report parameters***





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Small Business Specialist Scenario

- **Formula for calculating SB %:**
- **$SB\% = SB\$ / TSBE \$$**
- **Small Business percentage equals Small Business Dollars divided by Total Small Business Eligible Dollars**
- **For SDB, SDVOSB, WOSB, and HUBZone SB % calculations, only the numerator of the formula changes.**





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Other Standard Reports

Unique Vendors This report reflects the number of Unique Vendors in a given Fiscal Year.

Exercise: Run the Unique Vendors report for your activity from 10/01/2013 to present, drilled to Fiscal Year

Awards By Contractor Type -This report displays the dollars and actions for Awards by Contractor Type. The report also allows drilling down to the PIID level.

Exercise: Run the Awards by Contractor Type report for your activity for FY17

Bundled and Consolidated Contracts Report - This Report displays the actions and dollars for Bundled and Consolidated Contracts that exceed the threshold that was in place on the date signed of the action



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Other Standard Reports

Total Actions by NAICS Report

The report displays actions and dollars by North American Industry Classification System (NAICS) sectors and codes.

Exercise: Run the Total Actions by NAICS Report to identify Top Ten NAICS for your activity in FY17.

Contract Detail Report This report provides the complete contractual data for the specified PIID.

Exercise: Run the Contract Detail Report on a contract # of your choosing.

Federal Contract Actions and Dollars This report displays the federal contract actions and dollars for the specified date signed range

Exercise: Run the report to determine how many dollars your activity has obligated this fiscal year.



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Other Standard Reports

Procurement History for Market Research Report This report provides total dollars awarded to all vendors for a Product and Service Code (PSC) given in the search criteria.

Exercise: How many actions at your activity are coded with FSC 9999 at your activity?

Contractor Search This Report shows Total Actions and Dollars for a given Contractor.

Exercise: Run a report to identify what percentage of your DODAAC's FY17 obligation was made to your top 25 vendors by \$ volume

Potential Vendor Anomaly Report This report displays all the contracts that are marked as Small Business in the CAR, but the contractor is one of the Top 100 Federal Contractors.

Exercise: Does your activity show any anomalies?



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Other Standard Reports

Subcontracting Plan Report This report displays "Subcontracting Plan" data as 'Plan Required - Incentive Not Included', 'Plan Required - Incentive Included' or 'Plan Required (Pre 2004)' for base documents.

Exercise: Run report to determine how many FY17 awards require a subcontracting plan at your activity



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Always consider

- **Trends**
- **Dates**
- **Analyze the data...don't just provide it.**
- **Data anomalies**
- **Ad hoc reports may be needed**



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QUESTION AND ANSWER SESSION





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FOR MORE INFORMATION

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