

OFFICE OF THE PRESIDENT OFFICE OF MANAGEMENT AND BUDGET WASHINGTON, D.C. 20503

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MEMORANDUM FOR CHIEF ACQUISITION OFFICERS

SENIOR PROCUREMENT EXECUTIVES

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Performing by Delegation the Duties of the Administrator for Federal Procurement Policy

SUBJECT: Strengthening Federal Agency Procurement Forecasts

Competition is a key pillar of the Federal acquisition system and a critical tool for achieving the best return on investment possible for our taxpayers. To help foster robust competition, agencies have long been required by statute to prepare annual forecasts of expected contract opportunities, but variance in the quality and timeliness of agency forecasts has complicated contractors' ability to prepare for competition. In addition, lack of centralized access to search forecasts across agencies and their components has created barriers to entry for small businesses and complicated agency efforts to attract new entrants that can help to strengthen domestic supply chains in the federal marketplace.

The Office of Management and Budget (OMB) continues to work closely with agencies to buy as an organized entity to get better contract outcomes and to improve the resilience of the federal marketplace. Better procurement forecasts are an important part of constructive engagement with industry that helps contribute to effective, responsible, and efficient execution of federal procurements. Consistent with these goals, this guidance provides direction to strengthen procurement forecasts by improving the quality of forecast content, the timeliness of forecast information, and vendor access to agency forecast information through a centralized point that is phased in over the next 18 months. These priorities have been informed by a public crowdsourcing campaign conducted by the Office of Federal Procurement Policy (OFPP) that engaged hundreds of small and large businesses across the country in a collaborative exercise to better understand vendor needs.² Campaign participants submitted feedback on forecast information that was strongly supportive of enhanced access through a centralized point, content standardization, timely updates, and improved technological solutions.

¹ Section 8(a)(12)(C) of the Small Business Act, 15 U.S.C. § 637(a)(12)(C), requires agencies reporting actions to the Federal Procurement Data System (FPDS) with an aggregate value in excess of \$50M in FY 88 dollars to annually prepare and periodically update a forecast of expected contract opportunities or classes of contract opportunities that small business concerns are capable of performing.

² For information on the crowdsourcing Campaign, including the summary campaign report, see <u>"Navigating Tomorrow"</u>'s Opportunities: Help Improve Forecasts of Procurement Opportunities."

Management Guidance

In accordance with the guidance below and the phase-in schedule set forth in Attachment 1, agencies should take actions to strengthen published forecast content, post information on a regular basis and update it as necessary so it is current and timely, and work with the General Services Administration (GSA) to provide centralized access to forecast data on its Forecast of Contracting Opportunities (FCO) tool, a forecasting solution hosted on AcquisitionGateway.gov.³ FCO enables potential offerors to seamlessly review forecast information from any federal agency or component that shares its information on the website. In order to support a centralized view of forecasting opportunities, agencies may choose to either use their own tool and upload their standardized forecasting information and data to the FCO or use the FCO as their forecasting tool. 4

1. Improving forecast content quality by creating a standardized set of data elements: Agencies should work towards providing forecast information for proposed contract actions they anticipate publicizing in the government-wide point of entry in accordance with Federal Acquisition Regulation (FAR) subpart 5.2 requirements that are expected to exceed the Simplified Acquisition Threshold (SAT).⁵ The use of common, standardized data elements across all agency forecasts will provide consistent and essential information to vendors.

Accordingly, agencies should update their internal processes to track and publish the standard data elements identified below in their forecasts and standardize the information agencies provide in their forecast data fields by aligning the information to the prescriptions and definitions included in the Forecast of Contracting Opportunities Tool Data Dictionary, 6 or its successor, to the maximum extent practicable. Attachment 2 provides summary descriptions of each of these data elements with references to the Dictionary.

- Title for the potential contract requirement
- Description of potential contract requirements
- Existing contract/order number (if applicable)
- Contracting agency
- Contracting office/organization
- Predominant place(s) of performance Country
- Predominant place(s) of performance State
- Predominant NAICS Code
- Total estimated contract or order value range
- Extent competed
- Anticipated socioeconomic set-aside types
- Anticipated contract type
- Anticipated award type
- Projected fiscal year for release of solicitation
- Projected fiscal quarter for release of solicitation

³ Acquisition Gateway Forecast of Contracting Opportunities Tool.

⁴ The System for Award Management (SAM) at https://www.sam.gov, will continue to serve as the governmentwide point of entry for active procurement opportunities.

⁵ See definition of SAT in FAR 2.101.

⁶ See the Forecast of Contracting Opportunities Tool Data Dictionary https://acquisitiongateway.gov/documents/resources/23240. These definitions generally align with the definitions in FPDS Data Elements Dictionary available at

https://www.fpds.gov/downloads/Version 1.5 specs/FPDS DataDictionary V1.5.pdf.

- Projected period of performance start date
- Point of contact
- Small business specialist contact
- Date last updated

The FCO tool will provide current and prospective vendors with a centralized view of forecasts from across the government with standardized information on the data elements described above and in Attachment 2. However, agencies may collect, track, and publish additional data elements beyond those listed in Attachment 2, as appropriate, on their own forecasting tools. The Community of Practice on Federal Procurement Forecasting created by this memorandum (see Implementation Actions), led by GSA in collaboration with OFPP, will ensure appropriate data management and will coordinate with the Procurement Committee for E-government (PCE) on any potential adjustments, including any additions or deletions, to the tracked forecast elements and the FCO tool.

2. Improving timeliness of forecast information: The results from the crowdsourcing campaign indicated that more frequent reporting of forecast information can improve offerors' ability to engage, track, and respond to procurement opportunities.

Agencies should therefore update their internal policies and processes to report new forecasts on no less than a quarterly basis. In addition, to the extent possible, agencies should update previously published procurement forecast data if more current information becomes available to better inform prospective vendors. For example, if, an agency decides to amend its acquisition strategy, the agency should update the forecast to reflect any changes in strategy captured by the data fields listed above. Agencies should consider the nature of the requirement (e.g., size, complexity, commerciality, whether it is new or continuing) in determining how far in advance of the synopsis or release of the solicitation the forecast is made public.⁸

To the extent possible, agencies should publish forecasts with fully completed data fields to increase the usefulness of the entry. If information for certain data fields is not available when the forecast is otherwise ready for publication, the data field(s) should be labeled "to be determined" and information should be provided no later than the earliest quarterly update after the information becomes available, both on agency sponsored forecasting tools and on the FCO tool centralized view. If an agency concludes that it is unable to furnish information in a required data field for a given transaction, due to, for example, operational security concerns or timing of acquisition planning decisions, it should label the field "not available" and seek to address this information gap in future forecasts to maximize vendors' ability to plan for competition.

3. Improving access to forecasts by making forecast data available via a centralized view: The GSA FCO tool provides user-friendly search and filter functions. Equally important, it provides a single location for vendors and industry stakeholders to view all core data elements described above across all Executive Branch agencies.

To achieve the goal of improved vendor access to forecasting information, procurement organizations within agencies are requested to adopt one of the following two approaches (see Attachment 1 for the complete phase-in schedule process):

⁷ Agencies that choose to use the FCO as their procurement forecasting tool (as noted in Approach #2 below) will be required to coordinate with the Community of Practice and the PCE for the addition of customized data elements beyond those listed in this guidance.

⁸ To the extent possible, agencies should ensure timely archiving of forecast actions that have been published on the government-wide point of entry.

Approach #1. Agencies that have invested or plan to invest resources into developing and maintaining their own forecasting tools should ensure that their tools are accessible and navigable for potential users. As outlined in Attachment 1, by the end of Q3 of FY 2026, agencies must also have the capability to submit their procurement forecast data to the FCO tool to enable a centralized view for interested contractors of procurement opportunities across federal agencies. The FCO tool allows for automated Application Programming Interface (API) integration as well as manual bulk upload of data. The GSA Office of Small and Disadvantaged Business Utilization (OSDBU), in coordination with OFPP, will ensure agencies are assisted with on-boarding and creating sustainable processes for forecast data uploads into the FCO tool.⁹

Approach #2. Agencies who do not currently have and/or do not wish to maintain their own forecasting tool meeting the requirements of this memorandum may use the FCO as their own procurement forecast tool and enter forecast information directly on the FCO. GSA maintains a forecast tool template and data preparation tool that may be customized and used by agencies to track and upload data internally. Agencies who choose this approach should prepare their workforce to input all forecast information directly into FCO by the end of Q3 of FY 2026 - as part of the outlined roles and responsibilities, GSA will maintain updated GSA points of contacts for any questions and/or feedback from agencies.

Implementation Actions

Successful and timely transition to a centralized and standardized view of forecast opportunities is a shared responsibility between OFPP, GSA, and agencies. To meet this goal, agencies should strive to carry out the responsibilities enumerated in Attachment 1 in accordance with the stated timelines. Specifically, agencies should designate a Forecasting Lead, who will serve as the accountable official to OFPP for agency compliance with the requirements of this memorandum, and resolution of agency forecast data issues. The Forecasting Lead should evaluate and update, as necessary, the agency's internal processes on tracking and updating procurement forecast data, including identifying the appropriate points of contact and stakeholders within the agency who may be involved in the process such as the Senior Procurement Executive, the OSDBU, and/or the designated agency Industry Liaison.

The Forecasting Lead is also encouraged to explore and facilitate investment in tools and capabilities (such as API) that can provide long-term cost savings and promote efficiency and maximizing of existing resources. The Forecasting Lead should also evaluate potential training needs and capacity building of personnel involved in the forecasting process. In coordination with OFPP, GSA will establish a Forecasting Community of Practice that will include the agency Forecasting Leads representatives, as identified by the nominating agency, and will provide a space for agencies to collaborate, share best practices, and improve the quality and accessibility of procurement forecast information across federal agencies. The Community of Practice will engage and coordinate with the PCE to provide updates and to discuss data management and any desired revisions to the required core content elements.

OFPP will maintain this management guidance, in consultation with the Chief Acquisition Officers Council and the Forecasting Leads, and consider updates as necessary based on agency experience and feedback from the Community of Practice and the PCE. OFPP will also work with the other members of the Federal Acquisition Regulatory Council to review existing FAR coverage on forecasts and the need for any amendments.

⁹ Agencies that select Approach #1 should ensure that their tools and content are publicly available and easily accessible for industry partners in accordance with the objectives of this guidance.

Questions regarding this management guidance may be sent to the following mailbox: MBX.OMB.OFPPv2@OMB.eop.gov.

Attachment 1 - Agency Contract Forecasting Improvement Schedule and Roles and Responsibilities Attachment 2 - Standard Data Elements Charts

Attachment 1

Agency Contract Forecasting Improvement Schedule and Roles and Responsibilities

Agencies and the General Services Administration (GSA) should follow the enumerated actions in accordance with the schedule below to provide for the orderly phase-in of improved contract forecasting practices.

| | OFPP Responsibilities | Timing |
|----|--|--------------------------------------|
| 1. | OFPP will maintain this management guidance, in consultation with the Chief Acquisition Officers Council and the Equity Interagency Policy Council, and consider updates as necessary based on agency experience and feedback including feedback from the Community of Practice on Federal Procurement Forecasting and the Procurement Committee for E-government. | Ongoing |
| | Agency Responsibilities | Timing |
| 1. | Designate a forecasting lead to serve as the primary point of contact for agency on- boarding, agency compliance, and resolution of agency forecast data issues. | Within 3 months of guidance issuance |
| 2. | Engage with GSA's Forecast of Contracting Opportunities team to schedule agency on-boarding into the Forecast of Contracting Opportunities (FCO) tool by either directly loading data into the GSA FCO tool, or through electronic transfer of data from an existing in-place FCO tool (e.g. API). | Within 3 months of guidance issuance |
| 3. | Meet management guidance requirement number 1 on <i>improving forecast content quality</i> : Update tools, processes, and policies to capture the required core data elements of this management guidance. | By the end of Q3, FY 25 |
| 4. | Meet management guidance requirement number 2 on <i>improving timeliness of forecast information:</i> Put into place the processes and procedures required to collect and report forecasts on a quarterly basis. | By the end of Q1, FY 26 |
| 5. | Meet management guidance requirement number 3 on improving access to forecasts through a centralized view of forecasted opportunities: Ensure forecasts are fully available in GSA's FCO tool, taking steps to ensure all data is consistent across existing tools and proper processes and personnel are in place to ensure that agency data will be loaded into the FCO tool on a quarterly basis. | By the end of Q3, FY 26 |
| 6. | Ensure that agency maintains effective internal processes and is self-sufficient on updating and submitting data after initial onboarding (via the designated agency forecasting lead, as applicable). | Ongoing |
| | GSA Responsibilities | Timing |

| 1. | Maintain and properly secure the FCO tool and provide opportunities for agencies to upload and maintain agency data in an orderly manner. Ensure the FCO tool operates consistent with the management framework set forth in this guidance. | Ongoing |
|----|--|--------------------------------------|
| 2. | Provide OFPP a schedule of agency on-boarding, based on agency engagement, into the FCO tool to ensure full agency representation. | Within 6 months of guidance issuance |
| 3. | Provide training on the bulk upload and data preparation tools available for agency use. | Ongoing |
| 4. | GSA OSDBU or other designated office shall provide basic program management support, including sharing of best practices, to assist agencies in on-boarding and creating sustainable processes for forecast data uploads into the FCO tool. | |
| 5. | GSA OSDBU or other designated office shall develop capabilities to support compliance and utilization reporting for the FCO tool, including but not limited to FCO site utilization, agency on-boarding compliance, agency quarterly reporting compliance. | Ongoing |
| 6. | Employ best practices for human centered design to receive and incorporate agency and user feedback on the tool on a reasonable cadence. | Ongoing |
| 7. | Establish a Community of Practice on Federal Procurement Forecasting consisting of designated agency leads and other agency forecasting stakeholders. Coordinate with and engage the Procurement Committee for E-government for feedback on potential adjustments to forecasting elements and standards. | Ongoing |

Standard Data Elements Chart

This Attachment identifies standard data elements for a procurement forecast and provides summary descriptions and references to standardize the information provided in the data elements. The Forecast of Contracting Opportunities Data Dictionary¹⁰ outlines the field definitions, field standards, and other relevant information – the chart below should be used as general reference.

Agencies should strive to provide information for as many of the elements as possible in the forecast when it is posted. If the agency determines that information for a given field is not available when the forecast is otherwise ready for publication, the data field(s) should be labeled "to be determined" and information should be provided no later than the earliest quarterly update after the information becomes available, both on agency own forecasting tools and on the FCO tool centralized view. If an agency concludes that it is unable to furnish information about a data element for the planned acquisition, it should update field entry to "not available" and seek to address this information gap in future forecasts to maximize vendors' ability to plan for competition.

| | Data Elements List | | | | |
|-----|--|---|--|--|--|
| 1. | Title for the potential contract requirement | brief information on the procurement requirements | | | |
| 2. | Description of potential contract requirements | summary level, plain language description of the potential award | | | |
| 3. | Existing contract/order number (if applicable) | the unique identifier for each contract, agreement or order that is currently linked to the requirement (previous PIID if recompete) | | | |
| 4. | Contracting agency | the agency of the contracting office that executed or is otherwise responsible for the transaction | | | |
| 5. | Contracting office/organization | information on the organizational entity below the level of agency that is responsible for the requirements | | | |
| 6. | Predominant place(s) of performance - Country | the predominant place of performance at the time of award to include state and country identification and/or nationwide | | | |
| 7. | Predominant place(s) of performance – State | the predominant place of performance at the time of award to include state and country identification and/or nationwide | | | |
| 8. | Predominant NAICS Code | predominant North American Industry Classification System (NAICS) codes designate major sectors of the economies of Mexico, Canada, and the United States | | | |
| 9. | Total estimated contract or order value range | the estimated / anticipated dollar range to be obligated for the lifecycle of the award (not the independent government cost estimate) | | | |
| 10. | Extent competed | anticipated competitive nature of the contract including full and open competition, follow-on, and other than full and open competition | | | |
| 11. | Anticipated socioeconomic set-aside types | the designator for type of set aside determined for the contract action (e.g., 8a Competitive, HUBZone, Small Business, Women-Owned Small Business, etc.) | | | |

¹⁰ Link to the Forecast of Contracting Opportunities Tool Data Dictionary -

https://acquisitiongateway.gov/documents/resources/23240. Note that to the maximum extent possible, the definitions in the Forecast of Contracting Opportunities Tool Data Dictionary align with the definitions in FPDS Data Elements Dictionary available at

https://www.fpds.gov/downloads/Version_1.5_specs/FPDS_DataDictionary_V1.5.pdf.

| 12. | Anticipated contract type | the type of contract as defined in FAR Part 16 that applies to the procurement (e.g., include firm fixed price, cost reimbursement, etc.) |
|-----|--|--|
| 13. | Anticipated award type | the type of award being entered (types of awards include Purchase Orders (PO), Delivery Orders (DO), BPA Calls and Definitive Contracts) |
| 14. | Projected fiscal year for release of solicitation | the fiscal year for the estimated solicitation |
| 15. | Projected fiscal quarter for release of solicitation | the fiscal quarter for the estimated solicitation |
| 16. | Projected period of performance start date | the projected and/or estimated period of performance fiscal year and quarter start date for the entire contract period |
| 17. | Point of contact | point of contact identified by agency to address questions regarding the forecast listing - to include email address of the point of contact for an IDV, entity, contracting agency, reporting agency, customer, and/or offset officer |
| 18. | Small business specialist contact | point of contact of the Small Business Specialist for the agency responsible for the listing |
| 19. | Date last updated | the date that an entry was last updated in the procurement forecast (automatically system generated on the FCO tool) |