



Industry Day Best Practices

Small Business Alliance

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SYNOPSIS

Government regularly hosts “Industry Day” events in order to provide information on pending procurements, encourage competition, create a level playing field for all potential offerors, and educate offerors on procurement practices and policies. Industry’s motivations to participate may differ, often focusing on gathering detailed information about upcoming procurements or discovering potential partners and competitors.

This paper identifies and compiles best practices in staging successful, value-driven Industry Days by providing specific recommendations from the initial planning stages through the successful execution of an Industry Day event.

American Council for Technology–Industry Advisory Council (ACT-IAC)

The American Council for Technology-Industry Advisory Council (ACT-IAC) is a non-profit educational organization established to support the government’s mission. ACT-IAC provides a unique, objective, and trusted forum where government and industry executives are working together to improve public services and agency operations through use of technology. ACT-IAC contributes to better communication between government and industry, collaborative and innovative problem solving, and a more professional and qualified workforce.

The information, conclusions, and recommendations contained in this publication were produced by volunteers from government and industry who share the ACT-IAC vision of a more effective and innovative government. ACT-IAC volunteers represent a wide diversity of organizations (public and private) and functions. These volunteers use the ACT-IAC collaborative process, refined over 30 years of experience, to produce consensus-based outcomes. Findings and recommendations contained in this report are based on consensus and do not represent the views of any particular individual or organization.

To maintain the objectivity and integrity of its collaborative process, ACT-IAC does not accept government funding.

ACT-IAC welcomes the participation of all public and private organizations committed to improving the delivery of public services through the effective and efficient use of IT. For additional information, visit the ACT-IAC website at www.actiac.org.

The ACT-IAC Small Business Alliance

ACT-IAC, through its Small Business Alliance, developed this project to assist government and industry in developing and executing more effective Industry Days for IT-related acquisitions. The ACT-IAC Small Business Alliance advises and equips government with best practices and lessons learned focused on improving the interaction between government and small businesses.

Disclaimer

This document has been prepared to contribute to a more effective, efficient, and innovative government. The information contained in this report is the result of a collaborative process in which a number of individuals participated. This document does not—nor is it intended to—endorse or recommend any specific technology, product, or vendor. Moreover, the views expressed in this document do not necessarily represent the official views of the individuals and organizations that participated in its development. Every effort has been made to present accurate

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Further Information

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Executive Summary

Government acquisition and program leadership and staff experience inconsistent results and outcomes from Industry Day events according to members of the Government Advisory Council, which presented these concerns to the ACT-IAC Small Business Alliance during a meeting in early 2017. Some Industry Day events provide much value by improving the acquisition strategy for an upcoming procurement, whereas others are seen as a waste of time and energy due to the lack of substantive information exchange and dialogue around the government's requirements. The Small Business Alliance created its Industry Day Best Practices working group to research and propose ways that agencies and small businesses can leverage Industry Day best practices to develop and execute more effective Industry Day events that will be more valuable to both industry and government, thereby improving the quality of IT acquisitions.

To assist Federal government agencies, the project team gathered feedback from government and industry about Industry Day best practices, trends, and practices to avoid when designing and executing an Industry Day. This report recommends specific best practices, and provides agenda templates for use by government.

The process of developing these recommendations involved independent research by the project team, surveys with ACT-IAC members (both industry and government), and interviews with Office of Small and Disadvantaged Business Utilization (OSDBU) Directors, Category Management, and acquisition personnel from numerous Federal agencies, including:

- U.S. Department of Defense, Defense Information Systems Agency (DISA);
- U.S. Department of Defense, Missile Defense Agency (MDA);
- U.S. Department of Health and Human Services (HHS);
- U.S. Department of Interior (DoI);
- U.S. Department of Labor (DoL);
- U.S. Department of State (DoS);
- U.S. Department of Treasury;
- U.S. Department of Veterans Affairs (VA);
- U.S. General Services Administration (GSA);
- Social Security Administration (SSA); and
- The Federal OSDBU Council.

Introduction

Federal OSDBU organizations were created to promote the use of small businesses throughout their agency and advocate for the ability of small businesses to provide the products, goods, and services that Federal agencies need in order to achieve their mission. One way to meet this goal is for OSDBU organizations to hold Industry Day events, where all business interests, including the small business community, will be able to learn about upcoming procurements, acquisition strategies, and procurement timelines, while meeting in an open forum with government program managers and other companies.

Frequently, however, both government and industry report the quality and usefulness of Industry Days varies widely from agency to agency, and from event to event. This report summarizes feedback from Industry and Government about what constitutes a successful Industry Day, makes recommendations to both Industry and Government about actions that each stakeholder can and should take to improve their Industry Day experience, and provides three agenda templates for different types of Industry Days in the Appendix.

Industry Feedback

Summary of What Is Working and Why

We asked industry leaders to tell us in their own words – through interviews and surveys – what they have found valuable at the best Federal agency sponsored Industry Days that they have attended. Their comments are summarized below:

- **Program Office Participation** – The most successful Industry Day events have government program office staff present how upcoming acquisition(s) are meant to address capability gaps or mission needs, why the government is seeking contractor support, and how success will be defined for the subsequent project. Hearing their perspective is seen as invaluable to understanding the agency's procurement strategy. Having the ability to actually meet one-on-one with program office personnel is also seen as a positive aspect of an Industry Day agenda.
- **Having a Question and Answer Session** – Industry Day events that incorporated an open Question and Answer session were also among those that were considered to be the most valuable. This interaction between the senior agency representatives and contractors provides participants with greater clarity on the details of the upcoming opportunities.

- **Providing Time for Networking** – The best Industry Days were ones that provided time for informal networking with other companies that are attending and could become teaming partners. Opportunities to network with companies that have similar interests in a particular agency are often limited and by providing this time at Industry Day events Federal agencies are bringing together companies in a way that promotes thoughtful collaboration and the development of more effective solutions. Some ideas to facilitate industry networking include:
 - The use of symbols or colors on name tags to visually identify companies by socio-economic categories (e.g., green badge means Woman-Owned Small Business, red means Service-Disabled Veteran-Owned Small Business, blue means HUBzone firm) or by capability (e.g., green badge means that the company excels in Agile software development, red means that the company excels in Infrastructure Solutions, blue means that the company excels in cybersecurity). When taking this approach, agencies should post visible signage to explain the meaning of these colors or symbols, and they should be clear to note this qualifying information when publishing the subsequent Industry Day attendee list.
 - The incorporation of discussion topic tables in order to encourage informal discussion. In this instance, each table should be labeled with a specific topic related to the Industry Day: there should be at least one discussion topic table for each Industry Day agenda item. Include at least one government representative familiar with the topic at each topic table, and more if possible.
- **Specific Contract Opportunities** – Agency representatives should present specific information about upcoming opportunities, including projected timelines, rough orders of magnitude for contract size (either personnel or dollar value), preferred or projected contract vehicle(s), set-aside status, and comprehensive technical requirements. Such levels of detail provides contractors with a better idea of which opportunities to target and also which ones that will require teaming in order to meet all of the technical requirements.
- **Identify Contact Points** – An important aspect of a Federal agency Industry Day is providing the names and contact information of agency personnel that can be contacted after the event is completed in order to discuss particular opportunities before the window closes on discussions with contractors. Ideally these would be program office employees.

Summary of Complaints / Pain Points

When asked to identify the complaints they had regarding Federal government agency sponsored Industry Days, industry interviewees and survey respondents identified the following areas that need improvement:

- **Standard Agency Materials** – Industry finds little value in hearing Federal representatives present information that could readily be found on the agency’s website. Reciting standard agency planning documents, forecasts, and RFIs; and making generic statements without adding new insights are seen as an unproductive use of time for participants from both industry and government.
- **Too Full Agenda** – Industry Days that have a packed agenda of presentations often do not allow adequate time for interaction with the government personnel; and these events are not as valuable as those that do allow time for discussion. Open time for discussion is seen as critical to resolve any questions that participants may have regarding the procurement strategy, upcoming procurements, set-aside focus, procurement requirements, and favored procurement vehicles.
- **Minimal Agenda** - Conversely, Industry Days that have an extremely light or unstructured agenda with a short time allotted to presentations about the procurement’s acquisition strategy, forthcoming procurements, agency requirements, or interacting with the government personnel are also seen as not useful to industry. Typically, in these instances the bulk of the meeting is set aside for unstructured industry networking. This approach frequently proves to be counterproductive, of minimal value to the government, and a waste of industry’s time.
- **OSDBU-Only Participation** – Industry interviewees stated that while many of the OSDBU representatives have valuable insights regarding overall acquisition strategy within their particular agency, OSDBU personnel cannot provide the same level of information about procurement requirements, forecast, or specific procurement acquisition strategies as well-versed program office personnel who need to be part of the Industry Day event.
- **Willing Participation** – It was noted that having government personnel who do not want to be at the event sends a negative message to participants. Industry Day organizers should communicate the value of the event to the program office, educating program office personnel on how to

appropriately interact with industry during an event and working with the program office to jointly plan the event.

Recommendations for Government to Improve Industry Days

Those areas noted as working and providing value in the best Industry Days are the ones that we would recommend implementing in all future Industry Day events. The biggest challenge to that is the way various agencies are organized and the amount of interaction there is between the OSDBU and the Program Offices. In some agencies, there is a close tie between the two, whereas in other agencies they do not collaborate as closely. With program office participation being the most mentioned area of importance for Industry Day success, ensuring full program office participation is significant.

Agencies should consider working with a **professional facilitator** to design and execute these sessions, particularly when planning larger, more complex events. Qualified facilitators can be found via several trade associations, including the International Association of Facilitators (<https://www.iaf-world.org/site/>) and the Mid-Atlantic Facilitators Network (www.mafn.org), among others.

To recap, our recommendations for Industry Day best practices are:

1. **Program Office Participation**
2. **Having a Question and Answer Session**
3. **Providing Time for Structured Networking**
4. **Specific Contract Opportunities**
5. **Identify Contact Points**

Government Feedback

Summary of Findings About What's Working and Why

Government interviewees and survey respondents identified a number of areas that are important to holding a successful Industry Day. Industry Days take differing forms depending on whether it is a discussion of a pending solicitation or a vendor outreach session.

From a government perspective, a "successful" or "productive" Industry Day / vendor outreach session is one where:

- Government finds small businesses they can work with immediately (i.e., contract ready vendors);
- Small business receives information they can use to win future contracts;
- Government finds value in meeting their needs, provides for a competitive process, and subsequently receives quality proposals;
- The event is well attended and people are engaged in an active dialogue;
- Government holds an Industry Day early in the acquisition process for feedback about the draft procurement and how to address a requirement or problem;
- Government receives information to better define a requirement and create an acquisition strategy that will result in the most innovative and best value solution; and
- Saves the Government time and reduces the likelihood of protests.

Government interviewees and survey respondents noted that the following worked well and added to the success of their past Industry Day events:

- There needs to be two (2) fronts:
 1. Government must define their objective for a successful outcome to the Industry Day and any acquisitions that will be discussed during the event.
 2. Government must share information that states what they procure and how they procure so that industry has a better understanding of how appropriated money is distributed (i.e., flows) within the agency as well as which contract vehicles they will use for the particular procurement under discussion.
- Implement a Best Practice combining the prepared presentation segment with one-one sessions. An example is what DISA does for their Forecast to Industry event, which features a general session where senior DISA leaders and program managers brief specific areas of interest and the upcoming acquisition opportunities. Throughout the day Industry Partners can speak with subject matter experts located at a number of program tables. At the end of the day the agency holds a "Meet the Seniors" event, at which DISA's senior leaders and DISA's Industry Partners have the opportunity for short one-on-one conversations.
- The addition of matchmaking processes can help government find new, contract-ready small businesses that are trying to penetrate an agency, especially when the agency's requirements, needs, certifications, and clearance requirements are clear and well defined.
- At times limiting attendance to a set number (e.g., 100) of current contract holders created a group discussion where everyone was prepared, contract-ready, and open to holding meaningful discussions about upcoming

contracting needs and requirements. (It was noted that there is a downside to this approach in that it inhibits new company participation.)

- Facilitated sessions with current IDIQ holders created opportunities for emerging businesses to learn about how to be successful in the agency's environment, how to continually improve on government services, and how to collaborate across industry to develop innovative and cost-effective solutions.
- Utilization of Reverse Industry Days for small business.

Summary of Complaints / Pain Points for Government

Government agency representatives stated clearly that industry representatives – and Small Business vendors, in particular – need to prepare for an upcoming Industry Day or Vendor Outreach Session in advance. This is paramount to government and it includes:

- Vendors MUST be “contract-ready,” which means that the company must be registered in the Federal government’s “System for Award Management” (SAM), have an established DUNS number, have past performances that aligns to the needs and mission of the agency, have the appropriate facility clearance, and possess certifications for the opportunity at hand or forecast.
- Industry personnel need to come prepared with a basic understanding of the agency, review said agency’s acquisition forecasts, read through other information that has been released via FedBizOpps, read the draft solicitation, and develop germane questions.
- Industry attendees need to proactively engage and participate in the discussion.
- Firms should have a fact-based view or perspective about why their position is of benefit to the government.
- Industry should know when it is more appropriate to meet with Small Business Administration (SBA) and Procurement Technical Assistance Program (PTAP) representatives rather than attend an Industry Day.

Recommendations for Industry to Improve Industry Days

To recap, Government representatives offer the following recommendations for Industry in order to improve the outcome of an Industry Day, while recognizing that an event to discuss specific contract requirements versus a program area versus an overall forecast are all distinct and therefore they serve different purposes.

- 1. Preparation – on both sides.**
- 2. Set expectations – on both sides.**

3. **Have the ‘right’ participants – on both sides.**
4. **Attending companies must be ready to compete for a Federal contract.**
5. **Ensure those Industry participants are prepared – know the agency and the mission – so that you can meaningfully engage government in dialogue.**
6. **Know who to market to within an agency rather than a generic discussion of the company overview and capabilities statement.**
7. **If sending an alternate Industry representative, brief this person fully so that they can fully step-in and meet the government’s expectations.**
8. **Provide input as to how Government can create an acquisition strategy to get the most innovative and best value solution, as this will result in a stronger procurement and more refined requirement.**
9. **Share the information and knowledge that they can with others.**

Government’s key objectives for events that reach the Small Business community are to encourage competition as well as create a level playing field by providing information to help potential offerors make bid/no bid decisions and write targeted proposals that address the government’s requirements. The goal is to continue to increase the pool of acceptable small business participants to infuse “new blood” that will generate new solutions and meet an agency’s small business goals for that fiscal year.

Government representatives, especially those who support an OSD/BU, tend to focus their attention on newly formed small businesses just entering the government marketplace when they discuss recommendations for Industry. When referring to businesses that are “contract or procurement-ready,” Government expects that the small business has established a DUNS number, CAGE code, and registered in SAM so that they will be eligible to do business with the United States government.

Conclusion

Government and industry will get more value from Industry Day events if both parties understand their respective roles when participating in an Industry Day:

For Government:

- Provide meaningful information about upcoming procurements, including prospective timelines, acquisition strategies, a clear definition of the government’s needs or requirements, and the desired outcomes.
- Encourage and capture formal and informal industry feedback.

- Allow time for industry participants to network with each other and with the government participants themselves.

For Industry:

- Be procurement ready.
- Do your homework by coming prepared to learn, ask meaningful questions, and provide insightful feedback.
- Be ready to state why a specific solution or acquisition strategy is better for the government, not just your company, when you promote a specific solution or acquisition strategy in your discussions with Federal representatives.

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Appendix A– Sample Industry Day Agendas

This appendix includes sample or model Industry Day agendas for three types of Industry Days:

1. Half Day in-person event
2. Full Day in-person event
3. Virtual / Webinar event

These models are intended as guides or a starting point for government to use when planning their Industry Day event.

Agenda Template for a Half Day In-Person Event

This agenda assumes the Industry Day will be no longer than 3 hours. In such instances, we recommend holding this type of Industry Day in the afternoon, as this will enable companies that are traveling to the Industry Day to fly-in and fly-out of the Industry Day location on the same day, rather than have to incur the cost of a hotel room. (This issue is particularly acute for small businesses.) Also, Federal representatives should make all Industry Day presentations and the Attendance List available online, prior to the event if possible and soon after the event if not.

Time	Session Title / Content	Notes
30 minutes	Industry Networking	Allow time before the event for industry personnel to network with each other
15 minutes	Welcome <ul style="list-style-type: none"> • Review agenda and goals for event • Set expectations about the types of questions government personnel will be able to answer • Introduce all of the presenters and panelists and define their role • Provide logistics information (e.g., the location of restrooms and emergency exits, any building regulations, etc.) 	Formal start to the Industry Day
1 hour	Program Overview <ul style="list-style-type: none"> • How the Program supports the Agency’s mission • Program stakeholders • Program’s specific needs • Policy requirements • Other constraints 	The presenter should be the Program Executive / Manager or their deputy. Consider adding panelists from the Program who can provide detailed specifics about the Program requirements and answers to technical questions.

Time	Session Title / Content	Notes
	<ul style="list-style-type: none"> Allow time for audience Questions and Answers 	
15 to 20 minutes	Break	Assume 15 to 20 minutes for the break, particularly if the restrooms are not close by.
45 minutes	Procurement Information <ul style="list-style-type: none"> Acquisition Strategy Acquisition Timeline Acquisition Requirements Acquisition Procedures Allow time for audience Questions and Answers 	Given by the Procurement Contract Officer (if known) or other senior acquisition professionals who will be able to answer questions about the expected procurement process.
15 minutes	Question & Answer Period <ul style="list-style-type: none"> Make all speakers available for this session Open to follow up questions from earlier topics or new issues Document all questions and answers 	
	Formal Event Close <ul style="list-style-type: none"> At a minimum, provide an email address that participants can use to submit additional questions that will be answered publicly (e.g., via FedBizOpps) after the event has wrapped up 	Formally close the event
30 minutes	Informal Networking	Encourage government officials to mill about the room and talk to industry

Agenda Template for a Full Day In-Person Event

This agenda assumes the Industry Day will be a full day event, with a break for lunch. Full Day events are best for discussing multiple programs and their procurement opportunities, such as a beginning of Fiscal Year procurement forecast. Make all Industry Day presentations and the Attendance List available online in advance of the event if possible or shortly thereafter if not.

Time	Session Title / Content	Notes
30 minutes	Industry Networking	Allow time before the event for industry personnel to network with each other

Time	Session Title / Content	Notes
10 minutes	Welcome <ul style="list-style-type: none"> Review agenda and goals for event Set expectations about the types of questions government personnel will be able to answer Introduce all of the presenters and panelists and define their role Provide logistics information (e.g., the locations of restrooms & emergency exits, any building regulations, etc.) 	Formal start to the Industry Day
20 minutes	Opening Remarks <ul style="list-style-type: none"> Direction of the organization How the organization supports the Agency's mission Where and how the organization needs industry support (highlight the upcoming programs) 	Should be made by the organizational executive or deputy.
30 minutes	Program Overview #1 <ul style="list-style-type: none"> How the Program supports the Agency's mission Program stakeholders Program's specific needs Policy requirements Other constraints Allow time for audience Questions and Answers 	<p>The presenter should be the Program Executive / Manager or their deputy.</p> <p>Consider adding panelists from the Program who can provide detailed specifics about the Program requirements and answers to technical questions.</p>
30 minutes	Procurement Information for Program #1 <ul style="list-style-type: none"> Acquisition Strategy Acquisition Timeline Acquisition Requirements Acquisition Procedures Allow time for audience Questions and Answers 	Given by the Procurement Contract Officer (if known) or other senior acquisition professionals who will be able to answer questions about the expected procurement process.
15 minutes	Break	Assume 15 to 20 minutes for the break, particularly if the restrooms are not close by.
30 minutes	Program Overview #2 <ul style="list-style-type: none"> How the Program supports the Agency's mission Program stakeholders Program's specific needs 	<p>The presenter should be the Program Executive / Manager or the deputy.</p> <p>Consider adding panelists from the Program who can provide detailed specifics about the Program</p>

Time	Session Title / Content	Notes
	<ul style="list-style-type: none"> • Policy requirements • Other constraints • Allow time for audience Questions and Answers 	requirements and answers to technical questions.
30 minutes	<p>Procurement Information for Program #2</p> <ul style="list-style-type: none"> • Acquisition Strategy • Acquisition Timeline • Acquisition Requirements • Acquisition Procedures <p>Allow time for audience Questions and Answers</p>	Given by the Procurement Contract Officer (if known) or other senior acquisition professionals who will be able to answer questions about the expected procurement process.
60 minutes	Lunch	Allow up to 90 minutes if lunch facilities are not located on premise
30 minutes	<p>Program Overview #3</p> <ul style="list-style-type: none"> • How the Program supports the Agency's mission • Program stakeholders • Program's specific needs • Policy requirements • Other constraints • Allow time for audience Questions and Answers 	<p>The presenter should be the Program Executive / Manager or their deputy.</p> <p>Consider adding panelists from the Program who can provide detailed specifics about the Program requirements and answers to technical questions.</p>
30 minutes	<p>Procurement Information for Program #3</p> <ul style="list-style-type: none"> • Acquisition Strategy • Acquisition Timeline • Acquisition Requirements • Acquisition Procedures • Allow time for audience Questions and Answers 	Given by the Procurement Contract Officer (if known) or other senior acquisition professionals who will be able to answer questions about the expected procurement process.
15 minutes	Break	Assume 15 to 20 minutes for the break, particularly if the restrooms are not close by.
75 minutes	<p>Targeted Small Group Discussions</p> <ul style="list-style-type: none"> • Determine small group topics ahead of time • Set up areas of the auditorium or break-out rooms to informally address specific topics with government program and acquisition staff 	<p>The purpose of the small group discussions is to give industry time to ask targeted questions to government personnel that have detailed knowledge regarding the procurements in question.</p> <p>Can do this in one large room with a table per topic, or by using smaller breakout rooms</p>

Time	Session Title / Content	Notes
	<ul style="list-style-type: none"> Encourage industry personnel to move from small group discussion at their leisure 	
15 minutes	Formal Event Close <ul style="list-style-type: none"> At a minimum, provide an email address that participants can use to submit additional questions that will be answered publicly (e.g., via FedBizOpps) after the event has wrapped up 	Formally close the event
30 minutes	Informal Networking	Encourage government officials to mill about the room to talk to industry

Agenda Template for a Virtual Event

This agenda assumes the Industry Day will be virtual, online, or a webinar event lasting no more than 2 hours. Use a webinar tool that allows industry attendees to submit questions that the presenters can address in real time. Make all Industry Day presentations and the Attendance List available online.

Time	Session Title / Content	Notes
10 minutes	Welcome <ul style="list-style-type: none"> Review agenda and goals for event Set expectations about the types of questions government personnel will be able to answer Introduce all of the presenters and panelists and define their role 	Formal start to the Industry Day
45 minutes	Program Overview <ul style="list-style-type: none"> How the Program supports the Agency's mission Program stakeholders Program's specific needs Policy requirements Other constraints Allow time for audience Questions and Answers via the online submission function 	<p>The presenter should be the Program Executive / Manager or their deputy.</p> <p>Consider adding panelists from the Program who can provide detailed specifics about the Program requirements and answers to technical questions.</p>
45 minutes	Procurement Information	Given by the Procurement Contract Officer (if known) or other senior

Time	Session Title / Content	Notes
	<ul style="list-style-type: none"> • Acquisition Strategy • Acquisition Timeline • Acquisition Requirements • Acquisition Procedures • Allow time for audience Questions and Answers via the online submission function 	<p>acquisition professionals who will be able to answer questions about the expected procurement process.</p>
<p>20 minutes</p>	<p>Question & Answer Period</p> <ul style="list-style-type: none"> • Make all speakers available for this session • Open to follow up questions from earlier topics or new issues • Document all questions and answers 	
	<p>Formal Event Close</p> <ul style="list-style-type: none"> • At a minimum, provide an email address that participants can use to submit questions that will be answered publicly (e.g., via FedBizOpps) after the event has wrapped up 	<p>Formally close the event</p>

Appendix B – OSDBU and Industry Day Resources

This appendix includes OSDBU and Small Business resource information.

Establishment of Office of Small and Disadvantaged Business Utilization Office

Document reference: TITLE I—AMENDMENTS TO THE SMALL BUSINESS INVESTMENT ACT OF 1958, Chapter 3,

<https://www.gpo.gov/fdsys/pkg/STATUTE-92/pdf/STATUTE-92-Pg1757.pdf>

Industry Day Resources

1. FedBizOpps
FedBizOpps.Gov Small Business Events
2. OSDBU Interagency Council
OSDBU Interagency Council
3. Federal OSDBU Council Members
Federal OSDBU Council Members