

# 2011 VISION FORECAST PROCESS HANDBOOK

***BENEFITS TO PARTICIPATION ON A VISION FORECAST TEAM:***

- Access to a forecasting activity where member company participants meet face-to-face with federal government customers, think tanks and Wall Street analysts during hour-long TechAmerica Foundation Vision forecast roundtable discussions.
- Professional development
- Six months lead time on forecast information and analysis before public release at the Vision Conference
- Networking with your industry peers and competitors
- In-depth information on government requirements including forecasts, budget trends, reform initiatives, drivers, and potential business opportunities
- Access to major decision-makers across the federal government (civil and defense) through our forecast interview process

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## **2011 Conference Activities**

The 2011 Vision Conference will be held on October 19-20, 2011 at the Waterford Conference Center, Springfield, VA. It includes the 47<sup>th</sup> Annual Forecast of DoD and NASA, the 23<sup>rd</sup> Annual Forecast of Federal Information Technology (IT), and the 10<sup>th</sup> Annual Forecast of the Department of Homeland Security. Each year, volunteers of the TechAmerica Foundation—through market research and an extensive interview process—gather, collate, and analyze information for the annual Vision Forecast. Our purpose is to:

- Provide government customers the opportunity to express their current and future needs;
- Enable industry to understand and contribute to technology innovations, requirements development, upcoming opportunities, improved business practices and better customer relationships;
- Provide a forum for the IT and Defense community as a whole to obtain a concise, quantifiable assessment of the budgets, programs, priorities, and issues in these rapidly changing environments; and
- Encourage greater government/industry communication and interchange on issues, technology, programs and other areas of mutual interest.

## **Team Descriptions**

Following is a breakdown of conference segments and specific forecast teams on which Vision participants can contribute.

### **Civil Agency Teams**

This segment of the conference will focus primarily on Federal Information Technology Components and will include several teams. Following is a description of some of these teams:

#### **- Federal IT Budget**

This team prepares an annual five-year budget forecast of the IT market for civil and defense sectors of the Federal government, including an assessment of related plans, programs, and market topics that cover computers, telecommunication systems, and related products and services. The committee provides an overall analysis of the Federal and IT budgets for various civil and defense agencies, looks at top-line dollars and trends, and then forecasts Federal IT spending for the next five years. Included in this forecast is an assessment of the various agency Exhibit 53 submissions to the Office of Management and Budget (OMB). The effects of government administrative policies and procedures on the IT marketplace are determined in cooperation with government agencies, and a determination is made on essential facts and figures relating to the IT market.

### **-Game Changers**

This study team takes a qualitative look at the latest in Federal IT trends and how they will offer future business opportunities. For example, cloud computing, Web 2.0/3.0, Open Source, Internet of Things, Crowd Sourcing, etc.

### **-Cross Cutting Analysis of Contract Vehicles**

The Cross-Cutting Team will focus on one of the most dynamic aspects of Federal business – the Federal IDIQ, GSA Schedule, and GWAC marketplace, accounting for more than half of all information technology sales. The team will explore questions and issues of interest to anyone doing business with civilian and defense agencies – which contract vehicles do buyers prefer to use; why; and what opportunities are likely to spring from these agency cross-cutting contract vehicles over the next few years. The team will also develop predictions concerning the future of this market and forecast its growth.

### **-Department of Homeland Security**

This study team is charged with continuing to develop a methodology for assessing the integration of various agencies and the variety of elements in the markets that will emanate from this organization. It will provide both a quantitative and qualitative analysis, including a five-year budget forecast. Future program opportunities will be an important focus for this team.

### **-Other Civilian Agencies/Topics**

Other teams will look at key civilian agencies/topics focused on providing in-depth information on program opportunities. Emphasis will be on strategic plans, procurements and programs, technologies, trends and drivers, the political landscape, co-agency initiatives/roles, and outside influences. Agencies presented at the conference typically focus on those that offer the most opportunity for industry (e.g. VA, HHS, DHS, Justice) or have a major influence on how industry does business with the government (OMB and GSA).

## **DoD Teams**

This segment of the conference will focus on the ten-year outlook for the U.S. Defense market. Following is a description of the DoD teams:

### **-Macro Economic Forecast/DoD Topline**

This forecast team looks at the overall U.S. economic picture and development of a most likely scenario for discretionary spending. The DOD Topline forecast is a ten-year forecast of defense budgets. It involves a top down look at the DOD budget by appropriation category (e.g. RDT&E, Procurement, O&M and Milpers. The forecast will be in constant dollars of budget authority.

The forecast also will include relevant information about current DOD activities such as Overseas Contingency Operations (OCO), efficiency savings, changing acquisition practices and an estimate of the future force structure. (Experience on another team usually is a prerequisite.)

#### **-NASA**

This team analyzes budgets and opportunities for NASA space programs and IT, and presents a five year forecast of each.

#### **-C4ISR/DoD IT**

This team prepares a forecast that analyzes all opportunities related to defense mission critical and embedded systems directly involved in C4ISR. IT is considered an enabler for this activity. The major submarkets that will be covered are: C4 (Command and Control, Communications, Computers) ISR (Intelligence, Surveillance, and Reconnaissance) and DoD Information Technology (DoD IT). In all cases only the unclassified portions are included.

#### **-Cybersecurity Special Study**

This study looks at the issues, drivers and trends occurring within DoD and the services to provide cybersecurity. The importance of this marketplace continues to grow with government near term yearly expenditures of over \$10B. The team will analyze the future direction of the cybersecurity effort.

#### **-Services and Support**

This team provides an in-depth evaluation and analysis of the DOD Operations and Maintenance (O&M) budget, the portion that is contracted out, and the addressable market available to the defense services and support industry. The database developed by this team provides an excellent understanding of this key growing marketplace.

#### **-International Defense**

The international team will focus on trends and forecasts of the non-US global topline of defense expenditures. Important regions and countries will be described and key growth markets will be identified. Security issues which could affect the global topline and regional defense investments will be discussed.

#### **-Defense Acquisition Categories/Platforms**

For each of the areas listed below there is a team that looks in-depth at the issues, trends, drivers, budgets, major programs, and other criteria specific to each market that would be of interest and value to defense contractors. Each team develops a bottoms-up ten-year forecast for their market, which is compared to, and rationalized with, the Ten-Year forecast.

- **Aircraft**
- **Missile Defense/Precision Munitions**
- **Military Space**
- **Ships**
- **Vehicles**
- **Science & Technology (S&T)**

### **-Industry Outlook**

The team focuses on the Wall Street view of the defense industry. Interviews are conducted with equity analysts in New York, Boston and the DC area. The team effort is further augmented by a Defense Industry Outlook panel discussion at the conference.

## **FORECAST AND MARKET STUDY GUIDELINES**

### **Forecast/Study/Analysis Content**

The forecast process begins with secondary background research. As noted, each Vision team will begin by defining the parameters of the study and take individual participant commitments for specific background research. Data should be assembled using bottom-up and top-down techniques, drawing only on unclassified and open literature sources. This includes a thorough review of all information pertinent to the agency and/or topic and any outside influence thereon. All Vision study participants should have a good understanding of the subject under consideration.

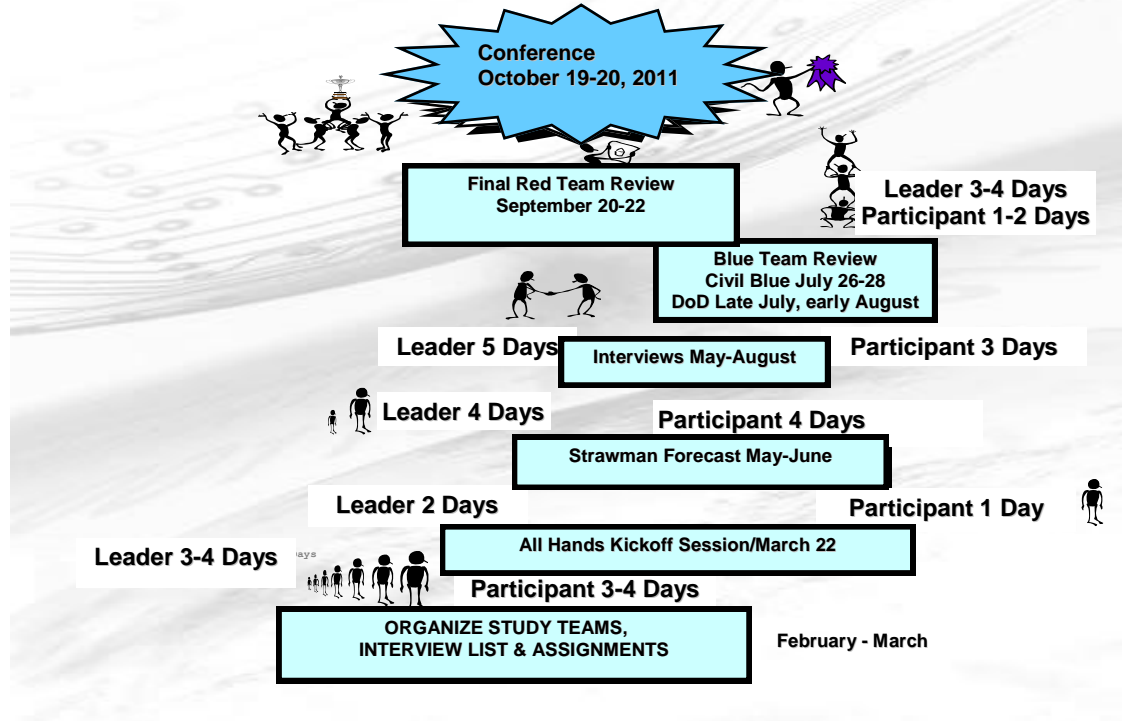
Organization of the study should be done early in the process with an outline of study objectives provided for team members to fill in blanks as information becomes available. It sometimes helps to use viewgraphs from previous years (if appropriate) as a strawman to determine what has changed and to assist the process of organizing the study. Of course, there will be changes to the outline as the study progresses, but this is a helpful tool for identifying priorities and making assignments. Remember, the interviews provide an opportunity to compare the draft data with what is being heard from the customer. It is important to provide an **analysis** of the market, instead of developing the forecast based solely on the information from the interviews. Keep in mind, also, that merely updating a forecast from a previous year does not differentiate the real changes that are taking place. Each year should be a fresh look at the respective agency/market. In the early stages, particular attention should be paid to determining how the team will quantify the market and who will be responsible for this task.

### **Participant Requirements**

The quality of participation reflects the commitment level by individual participants and teams as a whole, and determines the quality and value of the final results. The chart below is a good representation of what one can expect to expend on this effort if everyone participates fully.

# Vision Market Forecasts

## WHAT'S INVOLVED



## Leader/Participant Time Requirements

Those team members who qualify as team participants (see description below) will receive password access to the information that is developed and interview notes posted on the secured TechAmerica Foundation web site. They will also receive a reduction in price when registering for the 2011 Vision Conference if they qualify and participate in the study on a continuous basis.

Participants are those who:

- Contribute to the research process on a continuous basis;
- Provide analysis throughout the process;
- Attend at least 50% of all team meetings either in person or via teleconference;
- Participate in at least one team review (Blue/Red);
- Attend a minimum of three (3) interviews as assigned;
- Submit notes in a timely manner (notes are critical to the process);

If your ability to commit to this effort changes during the process, please advise your respective team and/or agency leaders immediately so that assignments can be readjusted, and, if necessary, you will be dropped from our participant list. The expectation is that all participants will contribute fully to the study.

## **INTERVIEW PROCESS**

### **-Data Gathering Result**

Interviews should be conducted **ONLY AFTER DATA GATHERING AND ANALYSIS HAVE BEEN COMPLETED**. Interviews are to be used to validate ideas, test theories, determine if there is consensus, address information voids and gaps, etc., based on the data gathered. During the data gathering and analysis period, agency teams should develop a strawman of the presentation to use in guiding them towards a particular focus or theme. Presentations may be used during the interview process as a basis for discussions—they are helpful in shaping customer feedback. Note that significant amounts of data will be provided in the conference CD, but only the highlights will be presented. Additional information that is deemed to be of interest, but does not make it into the formal presentation, can still be included on the conference CD as back-up slides to the formal presentation.

### **-Interview Lists**

Over the years, the teams have developed interview lists. These are developed, reviewed, and revised annually. In all cases, the Team Leader is responsible for developing a current list of people to be interviewed. The Team Leader should make assignments to team members to assist in generating a complete and final list of people to be interviewed. **Note: We use the term “interview” amongst ourselves; however, with the customer we call our activity a “meeting” rather than an “interview.” We have found that using the word “interview” often brings in a Public Affairs level of activity that is not necessary. It takes an inordinate amount of time to work this extra step until the customer office realizes that we are not looking for what they think of as the traditional press interview.**

A few of the basics for developing and updating an interview list include:

- Each year should begin with a fresh list, even though there may be repeat interview targets by virtue of the position rather than the person. Teams should not assume that previous lists are correct, because changes occur constantly.
- Lists **MUST** include full name, title, agency/firm, street address, city, state, zip, telephone and e-mail addresses of selected people the team would like to interview during the year. The name, phone # and email address of the interviewee’s point of contact (POC) should also be

included. (**NOTE: Every effort should be made to provide email addresses. Since the mail has been slow and unreliable email has become the most efficient means of contacting interview candidates.**) Where an individual's name does not clearly indicate gender, please provide that information on your list to avoid any misunderstandings. Please be sure to provide correct military rank information. Accuracy and completeness of information supplied about the interviewee is important to ensure proper action related to that interview request. If a name from the previous year is used, please take the time to verify current information.

- **NOTE: It is NOT the responsibility of the TechAmerica Foundation staff to compose interview lists or research the address data. This is the responsibility of each team.**
  - **Also, teams should make sure they can support interviews outside of the DC area. Team leaders should poll their members on their ability to travel to ensure coverage. It is the team's responsibility to schedule out of town meetings, not the TechAmerica Foundation's staff.**
- Team Leaders should remind team members that the purpose of the interview is to validate data gathered by the team, not to meet a person for personal company business.
  - If the team wants to interview a "position" that is currently vacant, the team must select that "position" as a placeholder. If another team later requests to interview the person having been named to the position, the team that originally specified the position will be the designated lead at the interview resolution meeting.
  - Lists should prioritize the top 20 names since this will be the order in which interviewees are contacted for meeting scheduling. (Note: It is not necessary to have 20 names on the list, but even shorter lists should show a priority for each candidate.)

Over the years we have found that extensive lists of people to be interviewed are counter-productive. Because of the time constraints on our participants and the need to be mindful of the time of our government customers, **teams need to be selective in the number of people they request to be interviewed and the location of the customer.** It has been found that a few really good interviews are just as effective as large numbers of moderately good or even poor interviews. One year, for example, one team requested meetings with 30 customers (down from 50 the previous year), and they found they had more than enough information to validate their research. Thus, it is strongly urged that teams develop shorter interview lists. If there is not enough information derived from those meetings, or if there is a compelling reason to

add more meetings later in the process, we can always do so. Towards the end of the process, the momentum for participating in interviews typically lags. If we concentrate on obtaining the critical interviews by being very selective, we do not use energy to obtain marginal ones. The TechAmerica Foundation and the team interview manager work closely together to maximize the return from the list of customers the team wishes to interview.

### **-Interview Database**

Foundation staff will establish a master database upon which they will enter all interviewee information, including which team requested the interview. The staff will assign interview codes for all potential interviewees to protect the “not-for-attribution” interview requirement. The code will be an agency and number designation. **This code number is to be used in place of the interviewee name on all notes and write-ups. No comments should be attributed to the customer being interviewed at any time (this includes team meetings and within your company).**

### **-Interview Resolution**

The Interview Resolution Meeting is held to coordinate all interviews where more than one team has requested to interview the same individual. This occurs much more with the DoD teams than Civil Agencies.

The Chair of the Strategic Forecast Council (or designated DoD and Civil Day Chairs) will serve as the arbitrator in the interview resolution process. Following established guidelines, the Chair will listen to team rationale for wanting to lead a particular interview, will prioritize requests, and will resolve all other issues as needed. Usually, multiple requests to see the same person will be adjudicated by designating a lead team and then offering a place at the interview to each of the other teams that wish to see a particular individual.

The first seat will be given to the Team Leader who will be responsible for following up once the interview is scheduled. The second and third seats will also be designated during the interview resolution process. Only seats one through three are guaranteed to attend the interview. (In a few special cases the interviewee will allow more than three team members to attend. However, only under exceptional circumstances should more than three people attend.)

### **-E-Mailing Interview Letters**

The TechAmerica Foundation emails the interview request letter on Foundation letterhead signed by the Chairman of the Foundation, Phil Bond. **No team or individual is authorized to mail out interview request letters on behalf of the TechAmerica Foundation.** The email body contains a short note that references the attached PDF version of the formal letter.

### **-Interview Coordination and Scheduling**

Each Team Leader needs to assign a participant on the team (if not himself/herself) to coordinate all interviews. A listing of all interview managers/leaders will be provided to all the teams. **The interview manager needs to be available by phone or e-mail during the interview cycle. The process can be hectic and constantly changing. Accessibility to this person is essential and should be taken into account when selecting an Interview Manager.** In addition, it is wise to have all team members provide alternate phone information (home/cell/hotel/etc.) so that they may be contacted in a timely manner should an interview change occur.

After sending out the emails requesting interview meetings, the TechAmerica Foundation staff will phone all potential interviewees in the Washington, DC, metropolitan area to arrange a time for them to be interviewed.

TechAmerica Foundation staff will alert the Team/Agency Leaders when the emails have been sent to interviewees outside the Washington, DC metropolitan area. **Due to the difficulty in determining team participant's availability and capability to travel, teams will make the follow-up phone calls to schedule outside DC interviews.** Teams need to advise the TechAmerica Foundation staff when outside DC interviews are scheduled so that this information may be added to the master database and disseminated as needed.

Once an interview is scheduled and notice is sent out to all Team/Agency Leaders, it is the responsibility of the team interview manager to contact their team members and any support teams to determine who will attend the interview. **Once the specific interview team has been formed, the interview lead calls the office of the interviewee to confirm the visit and to provide names and other pertinent information required, e.g. company affiliation, social security number. This should be done 1-2 weeks in advance of the meeting.** Another call should be made to the interviewee the day before the meeting to reconfirm. The interview manager also needs to let a TechAmerica Foundation staff member know who will attend the interview (and an emergency/cell phone number for each of them) because there are many times that the interviewee's office will call at the last minute and to say that an interview must be rescheduled. In this case, TechAmerica Foundation staff will contact the team and notify them of the change. **You must receive an e-mail or phone confirmation from the interview manager confirming that you are on an interview. If you happen to see that there is an interview scheduled that you would like to attend and you have not been called, check with the appropriate interview manager. If you just show up at the office where the meeting is to be held, and are not expected, you will be asked to leave.** Again, close coordination is essential. A log of all interviews will be kept up to date with the TechAmerica Foundation staff so that they can send thank you letters and provide copies of the final Forecast CD to those who were interviewed.

### **-Interview Questions**

The Team Leader is responsible for coordinating a list of questions to be asked during the interview. With many customers it is important that the interviewee receive a copy of these questions at least one week prior to the interview. With some, however, questions in advance are a hindrance to obtaining the meeting. The TechAmerica Foundation staff and returning team members will be able to judge what is needed in specific cases. During the interview, ample time must be given to each team attending, and also for those teams who are not attending, but are submitting questions, to ensure that all questions are posed during the interview. The key element is for each team to decide what interviews are truly critical to their study and to prioritize the questions for each customer.

If more than one conference activity or team is involved in an interview, the **interview leader** should assimilate a set of questions from all interested parties and e-mail it out ahead of time to all interview participants. The interview leader should ensure that each team gets to ask at least one question. The set of questions should be tailored to the person being interviewed and will be e-mailed to the interviewee ahead of time only if their office requests. As noted previously, this is a judgment call. We don't want to "scare" the interviewee into feeling obligated to answer every question in detail or into declining the interview because he feels he is not knowledgeable on all subjects. However, we want the interviewee to feel confident about the topics that will be discussed.

The interview leader should bring a set of back-up questions in case the interviewee steers the conversation in a different direction. Do not follow the list of questions exactly if the interviewee wants to expand on a certain subject. Let the meeting flow naturally; that is, do not read the questions. Also, be sure that the questions are open ended, encouraging discussion beyond a "yes" or "no" answer. Sharing a straw man forecast with the interviewee can help keep an interview on track.

### **-Managing the Interviews**

At least two, but not more than three team members should be present at a given interview. The individuals conducting the interview should all represent different member firms. **A minimum of two different companies must be at each interview. Team members who must cancel at the last minute should contact the Team/Agency Leader, interview manager, and TechAmerica staff to arrange for other representation.** Make sure you get someone "live" so the message gets passed on. **The substitute must be someone on the team roster and NOT someone from your company who is not officially participating and lacks training in the Vision process.**

All interviews are to be at the unclassified level. Use of electronic devices in any form (including laptop computers or tape recorders) is not permitted during an interview, unless the interviewee grants permission.

There are times when an interview is cancelled at the last minute. When the call comes into the TechAmerica Foundation, the staff will do everything they can to alert the entire interview team (again, a hotel, home or cell phone number is a plus). However, realistically, there are times when the notice is too short. Please understand that problems can occur at the last minute. The TechAmerica Foundation will attempt to reschedule all cancelled interviews, or work with the team leader to do so.

**The most critical part of the interview is the way in which the interview leader manages the meeting.** This person must handle all aspects of the meeting in a most professional manner. It is up to the interview leader to manage the up front coordination, making sure that all team interests are served, and that the process remains fair to those involved. At the meeting he/she will set the stage with the customer: verbalize the ground rules—not-for-attribution, unclassified, etc.; indicate that this is in the form of a round table discussion (it's not an interrogation); and make sure that everyone is introduced. The interview leader sets the pace of the meeting and makes sure that all participants are able to ask the questions that they need to have answered. The leader must remain sensitive to the customer's interests, concerns, and available time. The interview leader may need to gently keep the customer on the discussion topic(s) that have been previously prioritized by the participants. And the leader should signal the end of the meeting expressing appreciation for the opportunity to meet. It should be mentioned that the results of the conference will be made available to the interviewee after the conference is over.

### **-Interview Timeline**

One week before –

- In order to ensure correct information and location, the Interview Lead should contact the interview office, confirm the appointment, verify address data, and make sure the office has the names of team members (and any necessary information required by security), and tailored interview questions if appropriate.

One day before –

- In order to ensure up-to-date information and verify any last minute changes, the Interview Lead should contact the interview office, confirm the appointment time and location, and make sure the office has any updates to the names of team members.

15 minutes before –

- The interview team should meet prior to the interview to discuss the interview strategy, any sensitive issues, decide the most important questions, designate or reconfirm the order of who will ask which questions, assign the person who will be the lead note taker, and determine follow-up procedures. If the interview is in the Pentagon, meet 30 minutes ahead of time. At this time meetings at the Pentagon are quite difficult and require extra preparation on the part of the team and the office of the person being interviewed. Please be gracious and understanding regarding the requirements for access to the Pentagon (and other offices with similar security measures).

During -

- The Interview Lead should provide introductions, include a short statement about interview ground rules, establish the length of time for an interview, and establish the flow of the interview.
  - Ground Rules: Always state at the beginning of the interview what the TechAmerica Foundation is, what we are working toward in our forecast study, the cross-industry nature of the interview team, and that the discussion will be unclassified and “not-for-attribution.”

*Introduction: The TechAmerica Foundation is a 501c(3) non-profit, non-partisan affiliate of TechAmerica. The charter of the TechAmerica Foundation is to create and disseminate industry, policy and market research studies, covering topics such as U.S. competitiveness in a global economy, innovation in government and other areas of national interest. The Foundation also organizes conferences and seminars to explore pertinent issues with government and industry representatives and to share the Foundation’s findings. The Vision Conference is the Foundation’s major undertaking to achieve this goal.*

*Our interview team is here today to help prepare for this year’s conference which will be held in October. This will be the 47<sup>th</sup> year that we have presented our forecast. Your comments are “not for attribution” and to thank you for agreeing to meet with us, we will mail you a copy of the presentations and forecast from the conference. We would like to confirm that the meeting today will be for an hour.*

- Time Factor: Confirm the amount of time that is available for the interview (request one hour). Interviewee’s schedules often change and time allotted should be established at the beginning of the meeting.
- Interview Flow: The Lead Interviewer should share time with all participants, making sure that all key questions are posed and that each person has an opportunity to participate.

- There is absolutely no company marketing during the course of the visit. If an interviewee wants to discuss a company specific subject with someone in the interview team, the Interview Lead should suggest that they set up a separate meeting. It is made very clear in the letter sent to the interviewee requesting the meeting that it is not a marketing meeting, but an industry study.
- Wrap-up the interview by asking if the interviewee has “any messages to industry.” Let the interviewee know that we will furnish final conference proceedings, in the form of a CD mailed to them after the conference.
- All interview participants should take notes, even though one person is officially appointed “note taker.”
- **END INTERVIEW ON TIME!**

After the interview -

- Immediately following the interview, all interview team participants should take 15 minutes to compare notes on what they heard. This action has two purposes: 1) to make sure the documenter’s notes reflect a composite view; and 2) to discuss how the interview correlated with other views on similar topic(s). All note takers should provide their notes to the person assigned to do the write up.

A few days after -

- Copies of interview notes should be distributed (see below). Make sure you have permission from the customer to reproduce any handouts. If permission has been given, the Interview Leader should send copies of the documents to the TechAmerica Foundation for posting on the website.

### **-Interview Notes**

The interview note taker should write-up the interview highlights as soon as possible after completing the interview, but **no later than five business days (one business week) after the interview**. All interview notes should be treated as sensitive proprietary material. **Never identify the interviewee(s) or their office designation by name in written notes.** Do not name the file using their name, instead use the interview code. The code is always shown on the interview schedule. E-mails also should not include any identifying information other than the code.

Notes may include both the questions and the answers. They should provide information on the value of the interview, whether this person should be seen again and any documents received (all document originals should be sent to the TechAmerica Foundation). The interview leader assigns a person to be in charge of

writing up the notes, although all attendees are encouraged to take notes. The person in charge of writing up the notes should:

- 1) Collect notes from each person in attendance (or each person can fax or email the notes to the note taker);
- 2) E-mail the draft of the notes back to the team within 3 days; and
- 3) Get back any edits within 2 days, (assume no response means the notes are okay);
- 4) Post the final set of notes within a week of the interview to the TechAmerica Foundation website. There is a password protected section on the site for posting notes. Notes from every interview must be provided.

One of the reasons so many people assist in the process is that they have access to team interview notes, since they do not have the opportunity to attend all interviews. We urge all participants to promptly provide the notes so that they may be shared with others. You may be denied further attendance at interviews if the notes are not submitted.

#### **-Not-For-Attribution**

We would like to reiterate the need to maintain confidentiality of the information provided by those whom we interview. **We have promised “not-for-attribution” status and we strive to maintain the integrity of the process.**

- No name or position title (if that will identify the person) should be associated with the statements made. **This “not for attribution” provision should also be adhered to in using the information within individual companies, such as briefings to management.**
- These names cannot be used or directly quoted in conference or other presentations.
- Do not share the names or notes of those interviewed with other customers that you are meeting with (either through the TechAmerica Foundation or in other venues).
- No indication is to be made to the press or others not participating on our teams of specifically who was interviewed. Refer others to the TechAmerica Foundation staff if there are any questions regarding a list of interview contacts.
- Do not put the name of the person interviewed or specific office code/identification that would make it obvious to someone else who was interviewed on any notes or correspondence. Utilize the established interview code system.

### **-Presentation Review Process**

During the course of the year there will be three color team reviews—Blue, Red and Gold. Each review will have a different level of completeness for presentations.

**The Blue Team Review:** The Civil Blue Team review will occur over the July 26-28 timeframe, with time slots scheduled for each team. The DoD Blue Team review will occur over a two week period (most likely the last week of July and first week of August) with individual times set up for each of the teams. The Blue Team Reviews will be comprised of individual team working sessions. The goal of Blue Team is to ensure that each presentation has a cohesive theme and story. Each presentation should be eighty percent complete.

**The Red Team Review** should be a ninety-nine percent complete presentation. The Red Team reviewers consist of a number of outside subject matter experts that will make in-depth evaluations of the presentations. The schedule will leave enough time for teams to react to any substantial changes to the presentations and or forecasts. It may be decided that a Gold Team (dress rehearsal) is needed; this decision will be left to the DoD and Civil Conference Day Chairs. All team members are invited to participate in the review process; only those who have been contributing participants during the process will be allowed to attend Red Team. This determination will be made by each team leader.

**The Gold Team Review (if required)** is a final dress rehearsal with a verbal run through of the final presentation charts with the presenter to ensure completeness, continuity and message amongst presentations and a final evaluation of Red Team suggestions.

During all color team reviews, special attention will be made to:

- Ensure that the non-attribution ground rules are adhered to in terms of not calling out names or position title of interviewees.
- Ensure that company specific references, either negative or positive concerning program performance, are not made. Program opportunities within each agency presentation should focus on areas of future opportunity versus company specific past performance.