

The Executive Summary

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A BIMONTHLY PUBLICATION OF THE APMP NATIONAL CAPITAL AREA (NCA) CHAPTER

NEW POLICY FOR PAST PERFORMANCE

Unified Approach for Collecting DoD Past Performance Information

On November 20, 1997, Jack Gansler, the new Under Secretary of Defense for Acquisition and Technology signed a policy memorandum titled "Collection of Past Performance Information in the DoD."

The memo, which went to all service and agency heads responsible for collecting past performance information, provides a unified approach for collecting and assessing past performance. The document can be accessed at <http://www.acq.osd.mil/ar/doc/collect.pdf>

In short, it categorizes key business sectors and lists the key assessment elements and ratings. Performance Assessment Review Elements include technical (quality of product), schedule, management, cost control management, etc.;

the rating system ranges from exceptional to unsatisfactory. The real zingers lie in the technical subelements that include product performance, systems engineering, software engineering, logistic support/sustainment, product assurance, and other technical performance.

Gansler included an aggressive schedule to get this system implemented soon as well as to have an automated architecture in place to collect or store this information by January 1, 1999. ☛



**This may be the last time you hear from us!
We need your e-mail address for future correspondence.**

WHAT TO DO ABOUT LESSONS LEARNED!

Everyone Thinks It's A Good Idea

Food always makes proposal people happy, and Lou DeTurrus of ANSTEC, our host for the November Brown Bag Lunch, provided sodas and cookies to attendees. Discussions began with the premise that everyone thinks it's a good idea to hold lessons learned sessions after major proposals efforts, but we all agreed that the planned review sessions tend to slip though the cracks or more often, the right people don't attend.

Use An Impartial Moderator

Almost everyone agreed that if you can make the Lessons Learned Review happen, the best technique for facilitating the meeting is to use an "impartial" moderator. Impartial means someone without ownership in the process, who is more likely to keep the emotion of the moment from getting out of hand. How do you select an impartial moderator? One attendee mentioned that her company often asked a director from Human Resources for this role.

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President's Corner

by Jo Manson

As I reflect on the New Year, we at NCA have much to be thankful for. At our November meeting, we welcomed five new corporate partner companies—Applied Solutions, ARTI, CACI, HJ Ford, and Logicon. Their level of support and involvement in the Chapter provides us with some outstanding opportunities.

Our local meetings have continued to grow and attract strong attendance by members and guests. At our recent dinner, we also had so many people walk in that had not previously registered, we had to set up two additional tables. Our speaker, Bruce Walker, Federal Data Corporation (FDC) Technologies Chief Scientist and Assistant Vice President for New Business Marketing, provided a compelling discussion about the Air Force's risk assessment process.

I am also thankful to a strong board of directors who

ensure the chapter functions smoothly and efficiently. In addition, our recently revised newsletter has received rave reviews on both content and layout. And now I even have more to be thankful for.

New NCA Board Members

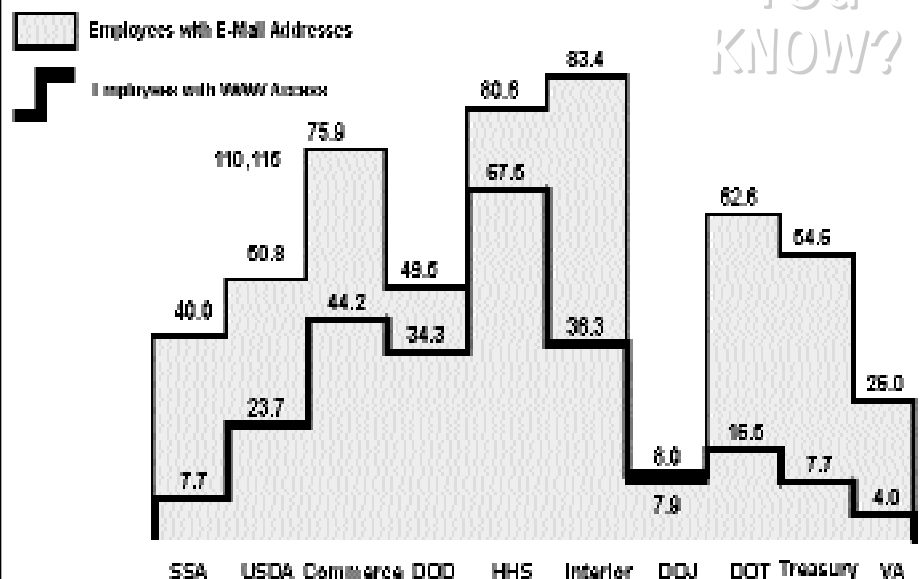
I am pleased to announce the addition of three new board members. Donna Galosi is our new Program Chair and has already started to identify topics and speakers for our upcoming Roundtables that will be stimulating and professionally rewarding. In addition, Kiersten Dick and Loriann Bobotek of Advantage Staffing Services will be our Meeting Chairs and coordinate all meeting announcements and registrations. They have already introduced several new and innovative ideas to improve our processes.

NCA is Growing!

Our free Brown Bag meetings are turning out to be a great place for guests to find out more about APMP and stimulate their interest in attending our Roundtable events and becoming members. This next year we will conduct monthly Brown Bags and bi-monthly Roundtables. In addition, we hope to launch our own home page soon. We will be conducting a local job bank, and have planned other initiatives that we believe will bring value to our members and stimulate even more corporate partners to join us.

On behalf of the board members, we look forward to your continued support and attendance at these events. See you at the Roundtable on January 21st at our NEW LOCATION, the Holiday Inn in Tyson's Corner! 🍷

Top Ten Federal Agencies Percent of total employees for each agency



Source: CACI Analysis of Data Provided by Federal Organizations

Lessons Learned...

From page 1

Don't Just List the Do's and Don'ts Again

In order to realize true value from lessons learned, it was emphasized that Lessons Learned must result in process changes rather than a mere collection of data on do's and don'ts. One company uses their business process re-engineering center as a vehicle for electronically capturing the data generated from the Lessons Learned sessions. Another uses questionnaires that are submitted electronically for data capture.

Lots of Ideas—How About Yours?

This was a very active Brown Bag session. Lots of great ideas were discussed, but we all felt we could do a better job at implementing process improvement from our lessons learned. The lunch ended with all of us still searching for effective ways to make this happen. We would value your feedback on what you do to conduct an effective Lessons Learned. Please email your ideas to Jeanne Whyte at jwhyte@erols.com, we'll make sure your ideas will get passed on to all our

members through the newsletter or through the upcoming Web page.

The Price of Success

Due to the overwhelming success of our brown bag lunches, we must start to restrict attendance to one individual per company per lunch. This way we can broaden the information that is shared. We promise to provide everyone a debrief of the discussion in the next Executive Summary. Also, to guarantee your admission to future brown bags, cancellations must be received 24 hours prior to the lunch. Thank you all for making this a popular NCA Chapter event. 🍷

Calendar of Events

The purpose of the calendar is to apprise NCA members of upcoming events of interest to proposal professionals.

JAN	12	NCA Board Meeting		703-383-7920
	15	APMP, Electronic Procurement Task Force	• Evolving Procurement Methods Conference	909-659-0789
	15	Advantage Consulting	• Advanced Pricing for Government Proposals	703-642-5153
	21	NCA Roundtable	• Outsourcing	703-383-7920
	21	Advantage Consulting	• Government Contracting for Program Managers	703-642-5153
	22-23	ESI International	• GWACS, IDIQ Contracts, and Schedules	703-558-3010
	27-30	ESI International	• Writing Winning Proposals	703-558-3010
FEB	2-3	ESI International	• Preparing and Delivering Effective Oral Presentations	703-558-3010
	11	NCA Brown Bag	• Approaches to Jump Starting Your Proposal Kick-Off Meetings	703-883-2590
	11-12	ESI International	• Procurement and the Internet	703-558-3010
	12	Advantage Consulting	• Proposal Development Workshop	703-642-5153
	19	Advantage Consulting	• Business Development Workshop	703-642-5153
	26	Advantage Consulting	• The Essentials of Government Project Management	703-642-5153
MARCH	2-6	ESI International	• Winning New Business	703-558-3010
	12	Advantage Consulting	• Proposal Development Workshop	703-642-5153
	18	NCA Roundtable	• Reward and Motivational Practices; Membership Night	703-383-7920
	19	Advantage Consulting	• Business Development Workshop	703-642-5153
	26	Advantage Consulting	• The Essentials of Government Project Management	703-642-5153
	APRIL	9	Advantage Consulting	• Proposal Development Workshop
16		Advantage Consulting	• Business Development Workshop	703-642-5153
16-17		ESI International	• Procurement and the Internet	703-558-3010
16-17		ESI International	• GWACS, IDIQ Contracts, and Schedules	703-558-3010
23		Advantage Consulting	• The Essentials of Government Project Management	703-642-5153
27		APMP	• National Conference (Colorado Springs)	909-659-0789

Proposal Software Solutions

From Sticky Fingers to High Technology

By Ralph Sklarew, Ph.D and Bill Boyle

Do you remember the days when your fingers got sticky while cutting and pasting pieces of written documents together? Remember trying to pick the correct type ball to insert in your IBM Selectric? How about choosing colors or patterns of Chartpac tape or rub-offs? While a few of us may recall the pre-PC days of proposal writing, none of us can deny the changes and improvements that software and technology have brought to our profession. Our end products have improved tremendously, both esthetically and in content. These improvements come at the same time as requirements for increased productivity and shortened time frames to respond to an RFP.

Preparing a winning proposal can be some of the most important business development activity we accomplish. These two-page to 15-volume documents require creativity, management skills, writing ability, and much more. Very little of your work product requires so many skills to come together in a such brief time frame. A winning proposal can produce more for your company than almost any other work product. With all this at stake, is there really a computer program we would be willing to stake our business on?

A Niche in Time

Specialists in software development have found niche markets to serve virtually every conceivable need from aerospace to zymurgy (the science of fermentation). The development of proposals is no exception. The specific tools available today and, coming tomorrow, range from tracking progress, text searching, desk top publishing, through to developing a sales strategy. How to identify, locate, evaluate, and use these tools will be the focus of a series of articles for *The Executive Summary*.

Dr. Sklarew is a Ph.D. (Physicist) consulting and starting technology-based companies for past 20 years. Technological applications management, strategic planning; Bill Boyle is working as MCI's Global Network Solutions Manager, preparing complex, commercial proposals for global network and Internet solutions for large multinational companies.

A 5-part series to review the software solutions of:

ADVANTAGE CONSULTING NETWORK
APPLIED SOLUTIONS
BARKER & ASSOCIATES
CCSI
JADE
KLS TOOLS
LCT INCORPORATED
MAD RIVER
ODYSSEY DEVELOPMENT, INC
POWERNET, INC
RANSONE ASSOCIATES
SANT CORPORATION
WISEWARE

In the next five issues we will discuss:

- A summary of the better software tools that serve our profession including types of products, firm names, addresses and contacts
- Various characteristics and criteria of each package with comparison charts so you can evaluate how your needs compare to the characteristics and criteria
- A description of each characteristic and why it is important
- Case histories of firms who have implemented proposal software, including "How to put it all together," and recommended best practices
- Guides to help you decide a make or buy decision
- Thoughts on implementation, planning costs, and justification
- Where the future will take us in this ever changing field, and how will the Internet and multimedia change our work product.

Software Benefits

We all know that the benefits of software can easily be overstated. How can we be sure the investment dollars are well spent and that the hoped for time savings will be achieved? It is fairly easy to identify the costs of developing a proposal; the time frame is limited, the people involved can be identified, production costs are

known, etc. Based on the software you choose to evaluate, you will be able to estimate the time savings and consequent reductions fairly easily. You know the number you will produce in a year and with simple calculations you can determine the payback period for the software investment. This will provide the quantifiable benefits.

The unquantifiable benefits, such as improved work product, easing the stress on the staff, allowing for additional opportunities to be examined, increasing the likelihood of meeting the proposal submission date, reduction in errors, meeting the client's requirements, and increasing your win-rate are more difficult to forecast. Each of these benefits can be achieved with careful selection and implementation. You must know your requirements, budget, and company talents/resources but benefits are all attainable.

A wide range of products can aid you and your firm to increase your business. In this series we will discuss the products from the vendors listed in the box at left.

We actively encourage other vendors to contact us so their offerings can be added to this list.

The products developed by these vendors have distinct capabilities and focus, some do more than others, some cost more, some meet only one or narrow but important needs.

Let's Get Started

The following product summaries are provided by the individual developers. We asked them to provide descriptions of their software. We are featuring them in random order as we receive them. Beginning with the next issue of *The Executive Summary* we will complete these product summaries and provide a product evaluation matrix.

Proposal Master and RFP Master by the Sant Corporation of Cincinnati, Ohio

Proposal Master produces just about everything needed for a complete proposal: the cover letter, title

page, table of contents, executive summary, statement of your client's objectives, presentation of products and services, your differentiators. Proposal Master can run stand-alone, on Lotus Notes, across a LAN, or on your corporate Intranet.

RFPMaster lets you search through existing text to find what you need in a matter of seconds. RFPMaster's features include:

- Hypertext search function using key words and Boolean logic
- Capability to edit answers on the fly
- Complete integration of client names to customize the RFP content
- Automatic creation of a compliance matrix, including dynamically linked page references
- Ability to store modified or new data so everyone has access to them
- A time stamp that automatically notifies content owners when it's time to review their data.

PME by Power NET, Inc

PowerNET's Process Management Engine (PME) lets you control and streamline your proposal process from beginning to end. Features include RFP parsing, compliance tracking, reuse library, document management, and metrics. PME provides a shared workgroup environment for the proposal team to share information and collaborate. PME's automatic assignment gener-

In the March issue of *The Executive Summary* we will cover other products and provide an evaluation matrix to help evaluate the products and their capabilities.

ation, electronic routing, and access control provide structure to organize the team's process.

WinAward™ by Bayesian Systems, Inc.

WinAward™ is a business opportunity tracking and bid decision analysis software tool for all competitive marketing and bid situations. The package structures the collection of opportunity information and helps companies select the best opportunities to bid. WinAward™ permits collaborative data gathering and use on networks with Government contractors (Federal, State, Local), and competitive commercial industries.

RESTRIEVE™ by Applied Solutions, Inc.

RESTRIEVE™ is a résumé search, tracking, and reformatting software tool focused on the

special requirements of professional services proposals. The package will soon provide the same capabilities for Past Performance project abstracts. RESTRIEVE™ permits collaborative work responsibilities and use on networks.

Proposal Strategist by Wiseware LLC

Proposal Strategist provide an interactive, multimedia tool to guide the user in developing proposal strategies that capture new business contracts. The patent-pending software is an easy-to-use "mid-tool" containing the reasoning process and mental models of expert business strategists.

Web page for the Information Exploration Series

For this Information Exploration Series, we started a Web page with background information to these articles. Please visit it at <http://www.skclarew.com/ProposalSoftware>. The site includes a complete series outline, a list of vendor contacts, evaluation criteria matrix, and article drafts, and the complete series of final articles published in *The Executive Summary*. Please contribute your suggestions, knowledge, and experiences to make this valuable to all NCA members. ☛

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Proposal Agility

Responding to Wide and Demanding RFP Requirements

Today's procurement environment demands proposal agility to respond to the constantly changing and ever complex past performance requirements many of us have been experiencing. This is especially true in the quick response, IDIQ environment where these complex requirements heavily tax even the most well organized and well managed corporate proposal data systems, regardless of company size.

Challenging RFP Requirements

Let's look at the Government landscape of recent RFP requirements.

NASA often wants you to document any key personnel change on a contract and state why the person left the contract. The Justice Department often tries to tie the people you bid to the projects you are including in past performance.

In EPA, a recent "oral" requirement did not include questions and answers or a presentation.

Instead, bidders were asked to send six key people who would each be asked two questions without consulting with one another or in the presence of the others.

And, how about the recent DoD procurement that asked you to submit two examples of past performance—your best contract and your worst (criteria not defined in the RFP).

And, of course, there was the recent Seat Management procurement that had such demanding asset management and user support requirements that it was only possible to bid with very large teams who had to combine their experience to meet the RFP requirements for such areas as "acquire, configure, burn-in, deploy and integrate a minimum average of 8,000 desktop computers a month for the last two years" or "shall have provided help desk support to a minimum of 100,000 users per year for the past three years. A minimum of 50,000 users shall have received COTS software technical support per year for the past three years."

Let's look at another recent example. The US Coast Guard asked offerors to give a 30 minute presentation of technical capability (this included experience and capability). Sounds simple so far,

right? Then at the end of the presentation, the Coast Guard gave the five key personnel present a sample task with 90 minutes to prepare and present their proposal to accomplish the task, which had to include a breakdown of hours by labor categories. The Coast Guard provided a computer, printer, and flip chart. The preparation and rehearsal time to prepare for this type of response is challenging to companies of all sizes, especially small businesses.

The Impact

When the Government places unrealistic demands on contractors, it impacts already limited B&P budgets. In addition, extreme demands for varied data and requirements can tax the best proposal processes because the response requires more complex proposal teams to complete these assignments thoroughly and accurately.

Here is an example of an unrealistic demand and an assessment of the cost of meeting the requirements. A Government agency was rebidding a personnel support service contract on which the incumbent of five years had more than one-hundred "specialists" working. In the RFP and at the Bidder's Conference, the Government indicated that it wanted to retain most of the current support personnel, despite which contractor won the rebid.

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- Non-Profit
- Precision Instruments
- Systems Integration
- Transportation Services
- Other (specify)

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Corporate Partners Receive Recognition

Five new Corporate Partners received special recognition at the November Roundtable. Left to right: Dr. Horace Jones, President/CEO of Advanced Resource Technologies, Inc. (ARTI); Ms. Ann Pederson, Executive Vice President, Applied Solutions, Inc.; Mr. Don Alducin, CEO, HJ Ford; Mr. Jim Ballard, Vice President, Logicon; and Ms. Patti Nunn, Director of Proposal Systems, CACI. At far right, is NCA Vice President Nancy Nix-Karnakis, who is the Corporate Partner Program Coordinator.

At the same time, the Government required full resumes, skill and experience matrices, and signed letters of commitment (from candidates not currently employed by the bidder) for more than 30 key or specialized positions. Not only did the three new competing bidders have to launch recruiting campaigns to try and get letters of intent from the incumbent's personnel, the incumbent had to launch an "anti-theft" campaign to keep its own people loyal. In addition, the new competitors could get no real information on the existing organization and responsibilities and, of course could not contact the current personnel at their work telephone number.

The result of this contradictory set of requirements was that even though the Government wanted to retain most or all of the incumbent personnel, those who showed loyalty and did not sign a letter of intent for the competing bidders, did not get their resumes considered for the position by the winning bidder. Some of the incumbent's employees lost their jobs, something the Government said it wanted to avoid. This also meant that the competitors had to recruit additional people to fill slots for which no letter of intent could be obtained, even though they knew that there was a fair possibility that the new recruit would never be offered the job if the incumbent's person wanted to stay.

Total Impact Evaluated

Total impact of these conflicting requirement was evaluated. Here are the results.

1. The support personnel were placed in a more stressful position. Three of them took the situation as a sign to look elsewhere and left within 60 days—before the contract was awarded.

2. Team play at the project was affected. More time was spent discussing "fear" topics, and a "to-sign-or-not-to-sign" debate raged.
3. The incumbent company was placed in a

The incumbent had to launch an "anti-theft" campaign to keep its own people loyal.

position where it had to ask for employee support and loyalty, and, in some cases had to "pay" for that loyalty with raises or other promised benefits.

4. Two of the competing companies could not fill some of the slots with local people, since the local pool of specialties had already been tapped out. Bringing in people from other areas added costs which either impacted the costing in the bid, or increased the risk to the competing company. One of the companies became non-competitive, just for this reason.
5. The increase in B&P costs to all the bidders

was increased by several tens of thousands of dollars.

What Are The Solutions?

In the last case, the solution would be to ask the Government to change the requirements so that competing companies would have only to show their top three or four personnel, in this case, the Project Manager, the Deputy Project Manager, the Training Manager, and one key Administrative position. These were the positions that would automatically change with new management. In addition, the Government could ask the competing companies to demonstrate only their ability to recruit and hire for a specific segment of the support population, and their ability to provide a smooth transition for the incumbent personnel. In this case study, the Government was asked to amend the requirements, but refused.

This, unfortunately, demonstrates that there are few practical solutions to many of these challenges other than trying to inform procurement officials about unproductive proposal requirements. For the most part, as proposal professionals, we can only react to each new set of requirements with agility. We must ensure that our data banks capture all new information collected on each job or contract we perform and document the results of each new RFP we encounter. Our agility will continue to be the cornerstone of successful proposals. ☛

Our "Favorite" Typos

...within twenty seven days of contract.

...an environmentally controlled vehicle with air brakes weighing 26,000 pounds or more.

...the test control group will consist of 20 male and 20 female rabbis.

...technicians shall be responsible for the injection of mendicants in the test animals.

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