The Executive Summary

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*Association of Proposal Management Professionals

Creative Reward and Motivational Practices in the Proposal Process

By Jo Manson, **Past President, National Capital Area Chapter**

Author's Note: In 1995, I conducted a survey of proposal rewards practices from across the country. Participants included 400 APMP proposal professionals who responded to a one-page survey. The results of the survey were presented during two sessions at the APMP conference in May of that same year. Later in 1998, as President of the National Capital Area Chapter, I also surveyed members and revised my survey findings. I have summarized the findings of all the research below and added some additional practices that I have encountered since the surveys were conducted.

Proposal professionals are in the people business. People develop, write, review, and produce proposals. No matter how automated and process driven we may become, we must still rely on a well-motivated staff to prepare winning proposals. It behooves all of us to learn what motivates our staff and focus our reward and motivational practices on the individual level. As managers, it is our responsibility to identify the most effective methods to reward, retain, and motivate our employees so they and the company both enjoy success.

Background

The original survey included APMP proposal professionals in large and small companies as well as those who worked as proposal consultants. Participants also reflected a wide range of positions including Directors, Proposal Managers, Writers, Editors, Production Staff, Proposal Coordinators, and Red Team Members. The largest response came from Proposal Managers. Another key source of rewarding practices was Bob Nelson's *1001 Ways to Reward Employees.* Two other books have been published since then that are also rich sources of reward and retention strategies. These include *Love 'Em or Lose 'Em* by Beverly L. Kaye and Sharon Jordan-Evans and *Motivating and Rewarding Employees,* by Alexander Hiam.

Categories of Responses

Multiple rewarding ideas or responses were received and were grouped into common topic areas. These included Team Building, Time Off, Food, Bonuses, Appreciation, Job Security, Salary, and Other. The category "Other" had a wide range of unrelated topics which statistically could not be grouped together so they remained in this broad category. A complete list of response categories is included at the end of this article.

General Findings

The general findings reported here reflect the top three responses of rewarding practices conducted before, during, and after a proposal. The percentages reflect the percentage of the total responses received. For example, of the 102 respondents, 41 percent responded "None" to what was done before a proposal begins. The response areas are presented in descending order.

Prior to a proposal, the three major response areas were:

1. None (41 percent)
2. Team Building (20 percent)
3. Other (14 percent).

Other ideas for motivational practices included creative/team building activities and cross training.

During a proposal, the three major response areas were:

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APMP National Capital Area (NCA) Chapter
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President's Corner by Lou Robinson

Have you ever worked on a program where you struggled to achieve success, but could only achieve stability? Then, all at once you began to see indicators that were positive and you felt the success could be achieved. The light at the end of the tunnel began to appear.

This is the way I feel about the APMP-NCA now. Over the last couple of years, we have worked hard, but the outcome has not been as good as what we wanted. Now, we are turning a corner and the positive indicators are there. To a large extent, the new success is because Rich Freeman set up a matrix organization consisting of a number of committees and assigned good (and often new) people the leadership responsibilities.

So let's take a look at all that has happened so far:

1. Betsy Blakney is doing a better job of documenting the association's business and financial activities than has ever been done before. She has provided interface with the bank and selected the best type of account for us and interfaced with the national APMP to be sure we follow and work in conjunction with their by-laws.

2. Tom Porter has arranged speakers and programs for the Roundtable meetings that are excellent and are causing our attendance to increase dramatically. At the last Roundtable we had 60 people in attendance and that was the space limit for the CACI Video Conferencing Facility. Incidentally, I cannot pass this point without issuing a huge thank you to CACI and all of their people who supported our last Roundtable. Tom is continuing his march and more good programs are on the way.

3. Dennis Doubroff and Betsy Blakney have done a large amount of work in developing a set of NCA Operating Procedures. These procedures document the way we operate and provide the required standards for our organization. These procedures are now in final form and ready to be ratified at our next Board of Directors Meeting.

4. Kate Rosengreen is producing better and more timely newsletters. She reaches out and identifies experts in our fields who share their knowledge with us through impressive articles. We are also getting more articles contributed by the membership. The newsletter has now gone electronic and the next issue (the one you are reading now) will be in color.

5. Our e-mail and postal address records were quite old and inaccurate. Rich Freeman has revised and corrected the list. We now have about 700 complete addresses and they are being maintained. We are now reaching out to the right people with our newsletter and announcements. I should add that this list is now growing.

6. Our Web Site was never current and the aesthetics of the design needed improvement. Carl Dickson is now getting the kind of help he needs to make the Web site shine. Tom Porter and Courtney Anderson of TRW met with Carl recently and a new effort has been initiated. The development effort will be separated from the maintenance effort. The development team will make it function and look good while the maintenance team will keep it up to date. Meanwhile, Carl has made enhancements to the old site to make it look more professional.

7. Glenda Schroeder continues to make the arrangements, take care of all registrations and collect all money for the roundtables. Her attendance records give us the baseline for applying to APMP for dues rebate and are an input to the membership committee.

8. The membership committee got a slow start, but they are now on the radar screen and are starting to do some good work. Pete Fagan and Karen Crawford are contacting people (mostly by telephone) who are new APMP members in our geographical area, are old members who have stopped attending or are APMP members in our area who do not attend Roundtables. They are also getting survey information from these people.

The NCA is very fortunate to have such a hard working team supporting it. We are seeing success in all areas and that can only lead to a better, more professional and larger association. I want to thank all of you (and the others I have not mentioned) for your large and successful efforts. ■

What Do Customers Actually Do With Our Proposals?

On September 20th, APMP/NCA will feature a presentation by Lt. Col. Caisson M. Vickery, Director of NRO's Acquisition Center of Excellence (ACE).

Have you ever tossed your proposal into the "acquisition abyss" without a clue for what will happen to it? (If you didn't raise your hand, you're lying!) Most of us have often wondered what the customer does with the "soft copy" they requested, what tools they use, how they verify past performance, or how they segregate proposals to ensure we are evaluated against standards (and not against competitor's proposals). Our next Roundtable event will help you understand the "other side." (I almost wrote the "dark side".) On September 20th, Lt. Col. Caisson M. Vickery, Director of the National Reconnaissance Office (NRO) Acquisition Center of Excellence (ACE), will provide an overview of the latest tools and processes used to support acquisitions.

Lt. Col. Vickery is responsible for the Center's mission of world-class acquisition support of NRO operational requirements. The Center provides support to on-going source selections, providing both formal and real-time acquisition training, supporting program management integration and being the lead for acquisition innovation and best practices within the NRO.

Lt. Col. Vickery was commissioned as a distinguished graduate of the Massachusetts Institute of Technology's Reserve Officer Training Corps. He has served in various contracting and instructor positions within the Air Force. His experience includes team chief of research and development contracts, branch chief for logistics and cost reduction initiatives within the B-2 SPO, and director of the Graduate Contracting Management department at the Air Force Institute of Technology. Lt. Col. Vickery holds an unlimited warrant and is a Certified Professional Contract Manager. He earned a Master of Science degree in Contracting Management from the Air Force Institute of Technology, and a Doctor of Philosophy degree in Business Administration (Information and Management Sciences) from Florida State University.

What is "ACE"?

They are the "other side" of the Proposal Operations organization—a buyer's agent instead of a seller's agent. Imagine the most efficient proposal organization you ever witnessed, and place them in the customer's facility. That is ACE—they provide leading-edge tools and skilled professionals to support the generation of RFPs and evaluation of responses for the NRO and related organizations.

Who May Attend?

Anyone interested in the topic is invited to attend. You do not have to be an APMP member to attend an NCA roundtable. You don't even have to be a proposal specialist. If you are interested in proposals, business development, or are looking for networking and professional development opportunities, we'd like for you to join us!

Please refer anyone else in your organization who might be interested and encourage them to attend. **(Note that we have again changed from our "third Wednesday" routine, in order to avoid a conflict with a religious holiday.)**

LOCATION: Tysons Corner Holiday Inn on International Drive in McLean, VA.

AGENDA: 5:30 pm Networking; 6:30 pm Buffet Dinner; 7:15 pm Announcements, Featured Presentation.

COST: $35—Payment received in advance, $55—Pay at the door

If you plan to attend, please RSVP to Glenda Schroeder at GSchroeder@advstaff.com

To confirm attendance contact Glenda by September 10. Glenda can also provide location and other information about the event. To reserve your seat, please mail your check to APMP, PO Box 2066, Arlington, VA 22202. Please forward this e-mail to anyone you think may be interested… ■

Calendar of Events

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

AUG	7	NCA Board Meeting	• Face-to-Face Meeting
SEPT	4	NCA Board Meeting	• Virtual Meeting (Telephone conference)
	20	NCA Roundtable	• Speaker: Lt. Col. C. Vickery, Director of the Acquisition Center of Excellence (ACE)
OCT	2	NCA Board Meeting	• Face-to-Face Meeting

For information regarding attending Board Meetings or Roundtables, please phone Lou Robinson at (703) 533-2102

The Service Contract Act: Proposal Pitfalls

BY SHLOMO D. KATZ & DANIEL B. ABRAHAMS—EPSTEIN BECKER & GREEN, P.C.

Self-insurance Programs

Unfunded self-insured fringe benefit plans (other than fringe benefits such as vacations and holidays which by their nature are normally unfunded) under which contractors make "out of pocket" payments to provide benefits as expenses may arise, rather than making irrevocable contributions to a trust or other funded arrangement, are not normally considered "bona fide" plans or equivalent benefits for purposes of the Act. However, a contractor may request approval by the Administrator of an unfunded self-insured plan in order to allow credit for payments under the plan to meet the fringe benefit requirements of the Act. In considering whether such a plan is bona fide, the Administrator will consider such factors as whether it could be reasonably anticipated to provide the prescribed benefits, whether it represents a legally enforceable commitment to provide such benefits, whether it is carried out under a financially responsible program, and whether the plan has been communicated to the employees in writing. The Administrator in his/her discretion may direct that assets be set aside and preserved in an escrow account or that other protections be afforded to meet the plan's future obligation.

Even if an unfunded self-insurance plan qualifies as "bona fide", it does not mean that the fringe benefit requirements are met. Only payments *actually made* by the employer can be counted, not the *value* of the plan. And, while all payments made for employees under the plan can be counted against the $2.56 average hourly requirement, only payments made for an individual employee can be counted against the $1.39 per hour H&W requirement for that employee.

What If the WD Doesn't Have All of the Necessary Jobs?

When a WD included in a solicitation or contract *omits* one or more categories of service employees that the contractor intends to employ under its contract, the contractor must classify the employees so as to derive appropriate wage rates and fringe benefits to be paid the employees. This is called "conformance." The classification chosen must provide a reasonable relationship between the unclassified employees and the classifications listed in the WD, based on an appropriate level of skill comparison. The regulations state that "a pay relationship should be maintained between job classifications based on the skill required and the duties performed".[11]

A contractor may obtain guidance for arriving at conforming rates from the way jobs are rated under the Federal pay system or from other WDs issued for the same general locality. In addition, one may rely on standard wage and salary administration practices that rank various job classifications by pay grade pursuant to point schemes or other job factors. Conforming rates may be established by indexing (adjusting) the prior year's conforming rate by the average increase or decrease in wages for classifications contained in the contract. Thus, rates may be conformed by looking at similar occupational categories, and increases in the rate may be extrapolated thereafter by looking at average increases under the WD.

Ideally, a contract should do a mini-conformance as part of its pricing of its bid. In any case, a contractor must institute its conforming rates procedures before employing a person in the missing job classification. Within 30 days after that, the contractor must prepare a *written report* of the proposed action concerning the conforming rates for the unclassified employees for submission of the Contracting Officer. The contractor must also discuss the proposed conforming rates with the unclassified employees or their representatives, and address any agreement or disagreement in its report. A contractor normally should use Standard Form 1444, "Request for Authorization of Additional Classification and Rate," in requesting approval of conforming rates.

Next, the contracting officer is required to submit the contractor's report, along with the agency's recommendations, to the Wage & Hour Administrator for review. The regulations state that the Administrator then approves, modifies, or disapproves the proposed rates within 30 days, and that decision is transmitted to the contractor, who in turn must give a copy to affected employees. The contractor must then pay those employees in accordance with the Administrator's determination. Should the contractor disagree with the Administrator's decision, it may appeal the decision to the Department of Labor's Administrative Review Board.

Implications for Proposal Pricing

The difficulty in arriving at conforming rates is that a contractor must attempt to second-guess the Administrator because the Administrator may determine that a higher wage rate and level of benefits than the contractor bid is appropriate. If that occurs, the contractor must pay that higher rate without a contract price adjustment.[12] Therefore, if possible, the contractor should attempt before bidding to obtain a clarified WD that includes the omitted classifications. DOL will refuse to conform rates where there is a job classification in the WD that it believes covers the work under the contract, even though the contractor believes the appropriate classification has been omitted.

Price Adjustments

The SCA regulations require that DOL issue a new WD prior to the exercise of a contract option, on the annual anniversary date of a multi-year contract subject to annual appropriated funds, and every two years in the case of a multi-year contract not subject to annual appropriated funds.[13] When the new WD is incorporated into a contract, the contractor is entitled to a price adjustment for increased wages and fringe benefits caused by the new WD.[14] There are several things to know about the Price Adjustment clause.

Generally

Pursuant to the FAR, a price adjustment includes only increased wages and fringe benefits, not overhead, G&A and profit. (For some reason, contractors frequently litigate this well-established rule, a waste of valuable resources.) In contrast, in the absence of a contract clause providing for a price adjustment, the contractor might be entitled to an equitable adjustment, including overhead and profit, as a "constructive change."[15]

In addition, if a WD is added to a contract *for the first time* in the middle of a contract year, the resulting price adjustment should include overhead, G&A and a reasonable profit.[16] However, if the contract always contained a WD, but the contractor was not in compliance with it, there is no price adjustment allowed for coming into compliance.[17]

The Warranty Provision

Because contractors are entitled to price adjustments when new WDs are incorporated into the contract, contracts containing the SCA Price Adjustment Clause require contractors to warrant "that the prices in this contract do not include any allowance for any contingency to cover increased costs for which adjustment is provided under this clause."[18] The purpose of this warranty is to prevent double recovery of nonexempt employee labor escalation costs. Under the clause, the contractor will get an "in-equitable adjustment" to cover escalation in wages and fringe benefits required by the new WD in the option years or at least every two years. Since this escalation will not include incremental overhead, G&A and profit, it follows, therefore, that contractors generally should consider including in their offers a contingency for these items. In additional, offerors should account for wage and fringe benefit escalation costs for their exempt employees, who are not subject to the price adjustment clause.

The SCA presents some very complicated issues in pricing any proposal. Contractors bidding on U.S. Government service work are well advised to get assistance in preparing their proposals to take maximum advantage of the intricacies of the Act. ■

FOOTNOTES:

11. 29 C.F.R. § 4.6(b)(2)(iv).
12. *Sterling Services, Inc.*, ASBCA No. 40475, 91-2 BCA ¶ 23,714.
13. *See* 29 C.F.R. §§ 4.4, 4.145.
14. FAR §§ 52.222-43 and 52.222-44.
15. *See Geronimo Service Co.*, ASBCA No. 14686, 70-2 BCA ¶ 8540.
16. *Lockheed Support Systems v. U.S.*, 3 W.H. Cas. 2d 785 (Fed. Cl. 1996).
17. *Holmes & Narver, Inc.*, ASBCA No. 40111, 93-3 BCA ¶ 26,246.
18. FAR § 52.222-43.

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Motivational Practices...

Continued from page 1

1. Food (25 percent)
2. None (21 percent)
3. Appreciation (19 percent)

While Food was somewhat predictable, it was still nonetheless disturbing that None continued to be so dominant. I have also observed that Food may be a demotivational tool when proposal teams are not allowed to leave the building throughout the day and food is continuously brought in. While the intention may be good, this may backfire if the practice is extended for long periods of time.

After a proposal, the three major response areas included:

1. Appreciation (33 percent)
2. Bonus (24 percent)
3. Time Off (13 percent)

What's Happened Since the Survey

The proposal world has continued to evolve with the use of more effective technology and best practices. However, we are still in the fundamental business of people management and those individual needs will always be a part of the proposal landscape. Below are some additional ideas to add to your bank of rewarding practices.

1. **Ask people how they want to be rewarded and recognized.** Do they want private or public recognition? How do they want to be rewarded? Do you know their hobbies or interests? Consider having them fill out a one-page data sheet that includes answers to these and other questions and allow them to update the sheet whenever they like. This creates a great inventory of rewarding practices tailored to the individual.
2. **Thank the Family Members Behind the Success.** The people we want to reward most likely have family members that would appreciate a note of thank you or appreciation for the time they sacrificed while that outstanding employee was either working long hours, traveling, etc. A simple card or letter letting family, parents, children know that Mom or Dad was doing an exceptional job goes a long way and is very much appreciated. Also don't forget to invite these special people to any reward or recognition ceremony.
3. **Power Up the Reward.** If you have an Employee of the Month or other type of company rewards program, consider leveraging the proposal reward into a wider form of recognition. This should only be done for those individuals who have truly gone above and beyond their proposal duties. Submit photographs of the proposal team to your company newsletter and include a brief article that identifies each member and their contribution to the team. Also ensure that senior management is part of the rewards ceremony to ensure high visibility for the rewardee.
4. **Maintain High Touch in a High Tech World.** We are all busy but nothing is more important than the personal note and praise. Whatever method works for you and meets the needs of the employees can be effective. Praise can be delivered in a hand written note, in a letter of recognition, in an e-mail, a phone call, or a voice message. Your sincerity, timeliness, and thoughtfulness will be remembered for a long, long time.

Categories of Survey Responses

1. None
2. Team Building; Team meetings; Being asked to be on the team; Debrief and lessons learned; Kickoff meeting; Group rallies;

Early involvement; Respect inputs in beginning; Empowerment
3. Time Off; Comp time; Flex time; Rest
4. Food
5. Bonus
6. Appreciation; Letters; Recognition; Praise; Win Parties; Publicity/ visibility
7. **Job Security:** Retention; Continued employment; Work on subsequent contract; Fear
8. **Salary:** Increased fees for consultants; Paycheck; Part of overall compensation; Yearly goals
9. **Other:** Coffee mugs; Relaxed dress; Support from management; Coaching; Get to choose jobs to support; Well-defined process; Home office; Winning; Friendships; Good strategic position; Team pride; T-shirts; Reputation as a winner/Winning team member; Flowers; Separate office/war room; Travel; Gift certificate; Association membership; Humor; Tickets to sports events. ■

Jo Manson is currently Director, Corporate Development Services for BTG, Inc. She can be reached via email at <jmanson@btg.com> or at 703-383-7920.

If At First You Don't Succeed…

At the most recent APMP Roundtable, we discussed and attempted to demonstrate several Internet-based tools for collaborative work with geographically dispersed proposal teams. The tools that we attempted to show in collaboration with the Georgia APMP chapter were Webex, eRoom, and AOL Instant Messenger. If you were at the meeting, you know that the Internet servers for both Webex and eRoom were down and we were unable to show the real power of these tools for remote collaboration.

Since the 7/11 meeting, the chapter officers have been exploring ways to provide you with some of the information that we intended to demonstrate. First, the list below gives you active links to the web sites of the providers of these tools. (This list was one of the handouts from the meeting.) On these websites, you will find detailed information and sample applications that you can view or try out.

Second, Judy Shaw, the vice chairman of the Georgia chapter, has talked to both the Webex and the eRoom people and gotten their agreement to present "webinars" to demonstrate their products. These would be two separate online demonstrations—one for Webex and one for eRoom—that you could attend to see live demos of these tools and to ask questions about their capabilities.

They have now set the "webinar" from eRoom for Wednesday, August 15, at 4:00 pm EDT. This session will be a combination conference call and web demo that you can connect to from your home or office. The Webex demo will be on Wednesday 8/22 at 4:00 EDT.

If you are interested in attending one or both, please send an e-mail with your name and e-mail address to me at thomas.e.porter@trw.com, with a cc: to Judy Shaw at Judy.Shaw@Workscape.com.

If you have associates who would like to sit in on this presentation, please feel free to invite them and include their names and e-mail addresses in your message.

We need your RSVP for eRoom by the end of business on this Friday, 8/10. At that time, we will send the names and addresses to eRoom, who will send out invitations with the URL and conference call number for the session on 8/15. We need the RSVP for Webex by 8/17. ■

WEB REFERENCES

The following Web sites provide detailed information and samples of the collaborative tools demonstrated at the 7/11/01 joint meeting of the D.C. and Georgia Chattahoochee APMP chapters.

Videoconferencing—
Regus Business Centres—videoconferencing and workplace solutions: http://www.regus.com/

eRoom—
eRoom.net—information about "renting" an eRoom plus access to demo eRooms: http://www.eroom.net/eRoomNet/default.asp

Main eRoom site: http://www.eroom.com/

MS NetMeeting—
Microsoft info about NetMeeting: http://www.microsoft.com/windows/netmeeting/

AOL Instant Messenger—
http://www.aol.com/aim/home.html

Webex—
http://www.webex.com/home/default.htm

Report on the July Roundtable at CACI

On July 11th, the APMP NCA chapter co-hosted a Roundtable event with the Georgia Chattahoochee Chapter on the topic of "Dispersed Proposal Team Collaboration Using Simple Internet Tools and Video Teleconferencing". Eric Gregory of CACI (and the CEO of APMP National) was our host for the evening as he had arranged for the use of CACI's videoconference facility for the meeting. Our joint meeting with Georgia was accomplished via video link over the Internet and audio link by phone.

The first agenda item was a presentation by Eric Messenger, the Director of CACI's Vision and Solutions Center in Chantilly, Virginia. Eric discussed CACI's internal multi-media communications developments which they plan to use to support collaborative efforts, such as proposals. He explained that the straightforward use of the Internet offered a cost advantage, but added a high technical risk because point-to-point access is only as reliable as the Internet at any point in time. CACI has been building a system based on Core-Express Extranets, which offer guaranteed, site-to-site performance between partners over the Internet through the creation of "tunnels" across networks of multiple Internet Service Providers (ISPs). Using an extranet approach, CACI can combine the point-to-point reliability and manageability of frame relay with the omnipresence, affordability, and scalability of the Internet and VPNs. In 2002, CACI's system will be established for collaborating sites to utilize the following integrated applications:

IP video conferencing
Web enabled collaboration tools
Voice over IP
Content streaming
T.120 / H.323 compliant applications -e.g. - MS Netmeeting

Eric's power-point presentation has been posted to the APMP NCA website.

The second half of the program was presented by Judy Shaw and Keith Propst, the Vice Chair and Program Co-chair of the Georgia chapter. They discussed—and provided a limited demonstration of—tools to support the distributed preparation of a proposal, based mostly on web technology. Rather than show the unique applications that their companies provide, Judy and Keith based their presentation on two commercially available web applications, Webex for shared presentations, and eRoom for collaborative workspace development. The eRoom, in particular, has a proposal-based scenario on their website that can be used to demonstrate their tools in our environments.

Both presentations were well received. In addition, the beautiful facility, the food (barbecue buffet), and the "virtual camaraderie" with our Southern brothers and sisters made the evening complete.

Because of the unique format, the NCA chapter exceeded the expected profits, and decided afterwards to refund a portion of the proceeds to the attendees. If you attended the Roundtable and did not receive an e-mail announcing the refund, please call Tom Porter at 703-345-7128. Also, please read the accompanying article ("If At First You Don't Succeed....") for follow-on activities related to this Roundtable. ▪

APMP Membership Application

APMP Federal Tax I.D. Number: [illegible]

P.O. Box 668 • Dana Point, CA • 92629-0668 • Phone: (909) 659-0789

(Annual Fee $75 – Submit with application, make check payable to APMP)

First Name | Initial | Last Name | Membership Number (leave blank if new)

Position Title | Company

Company Address | City | State | Zip Code | Mail Code | Daytime Phone

E-Mail Address | Area Code/Fax number

Home Address | City | State | Zip Code | Area Code/Telephone

Signature | Referred for Membership By | Date

Please indicate if you would like to affiliate with a local chapter ☐ Yes ☐ No

Please indicate type of membership. ☐ New ☐ Renewal

Please indicate your official APMP mailing address ☐ Business ☐ Home

Method of Payment: ☐ Check ☐ Visa ☐ MasterCard ☐ AMEX

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Exp. Date

Please check the appropriate box

Primary Function
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- ☐ Proposal Specialist
- ☐ Strategic Planning
- ☐ Other ______________

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- ☐ Computer
- ☐ Electronic/Precision Inst.
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- ☐ Financial Services
- ☐ General Services
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