Executive Summary

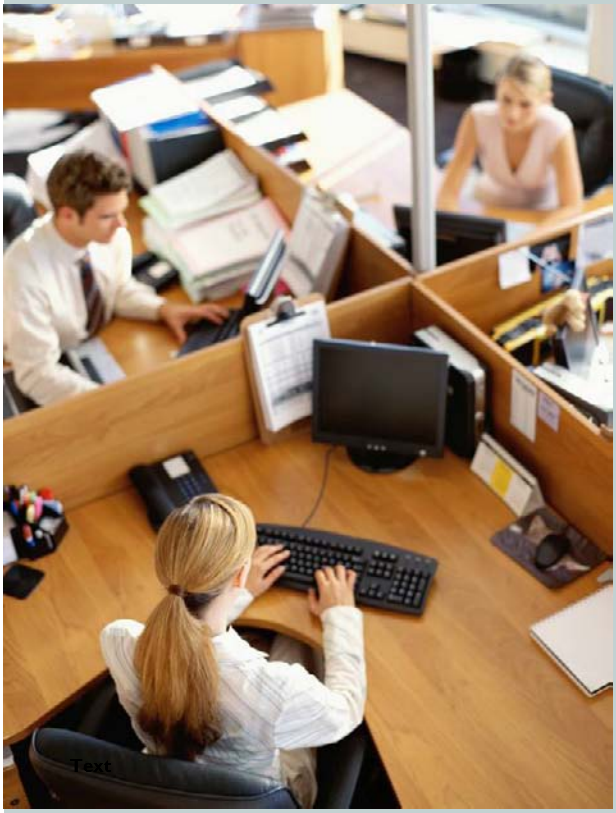
A Publication of the Association of Proposal Management Professionals (APMP) National Capital Area (NCA) Chapter

Winter 2007 Volume XIII, Issue 5

Special points of interest:

- As an NCA member you have more opportunities for networking and education than anywhere else in the country!
- Access presentations from previous APMP-NCA Roundtables at www.apmpnca.org/presentations.html
- Self-update your email address directly on the NCA *Member and Colleague Database* page on NCA's Web site

In this issue:



Even in an open cubicle with little or no privacy, team members feel much more comfortable in their own personal space. No one wants to work in the "slave pit".

President's Corner

War Room or Slave Pit?

Michael A. Scruggs, PPM.APMP

Several years ago, a corporate vice president asked me to design two war rooms at a new high-rise location. She had about $50,000 to spend.

Both spaces were in the interior of the building, so natural light was unavailable and skylights were out of the question. Lighting is important to team members, so I explored a new lighting product that provided natural-type light. The light emitted was less harsh and provided a more vibrant and natural effect. Unlike the standard fluorescent lighting, it didn't make you look 10 years older than you really are.

Unfortunately, the spaces already boasted the standard battleship gray-colored carpeting, and the walls had just been painted with off-white paint. The trim was a strange grayish-blue color. Considering this was brand new paint and carpet, I couldn't justify replacement just to introduce some exciting colors. So my focus was on wall board, equipment, and furniture to outfit the larger of the two spaces.

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Sponsored by the NCA Chapter

Professional Day 2007—Exceeding Attendee Expectations

Patricia Kent and Brenda Christ

Conference Highlights

Professional Day 2007 exceeded all expectations with a registration of 302 professionals. These career-minded individuals represented an impressive cross-section of large, mid-tier, and small companies in such diverse disciplines as proposal management, capture management, graphic design, pricing, and training.

Organized into six panel sessions and one single presentation, the program included a total of 16 speakers. Four of the speakers were Federal Government officials representing the General Services Administration (GSA), Army Contracting Agency, and Department of Homeland Security (DHS).

The theme for the program was *Recipes for Proposal Development Success*, with each presentation providing food for thought and real-life application for our day-to-day workplace responsibilities.

Attendees Meet Colleagues and Vendors

What better way to spend a day away from the office than seeing friends, meeting new colleagues, and visiting with vendors that offer exciting and innovative products and services. During Professional Day, the hall rang steadily with the voices of people sharing experiences and ideas and eagerly asking questions of the speakers.

(Continued on page 10)

Join us at the November 17 NCA Roundtable and learn how to set up your color team reviews so that deficiencies and "get well" strategies pop out at you.

Have a topic you'd like addressed at an NCA Roundtable?

Know of a potential guest speaker?

We are planning our 2008 Roundtable lineup now and want your input!

Contact NCA at www.apmpnca.org/contact_us.html or send your suggestions to info@apmp-nca.org.

Using Source Selection-Style Tools to Make Sense of Color Team Reviews

Walk away from your next color team review with a clear understanding of the critical feedback and where to go with it.

Use this sensible color team review approach that incorporates a "source selection" style technique—and both qualitative and quantitative analyses of the written proposal. Make better sense of reviewer feedback when you see it in a concise and organized format—where deficiencies and "get well" strategies pop out at you.

Take the confusion out of color team reviews with proposal-proven tools you'll get at:

APMP-NCA's November Roundtable
November 14, 2007; 5:30 – 8:30 p.m.
Fairview Park Marriott, Falls Church, VA

Bring your entire proposal team to the November 14 Roundtable and you'll all know how to:

- Set up a quantitative MS Excel scoring sheet using numeric scores and source selection-style color coding.
- Transfer these scores into a high-level management-style out-briefing.
- Create a recovery action list and sort by priorities.

Our presenter, Eddie Becker, has more than 25 years of bid-winning experience in the IT industry!

Eddie Becker is Director of Proposal Development at DRS Technical Services, Inc. He has experience in IT, telecom, aeronautics, weapons systems, human resources, distance learning, and e-training program arenas. And Eddie's most successful IDIQ/GWAC proposal efforts include GSA Networx, GSA Stars, Department of Commerce COMMITS, U.S. Army Rapid Response (R2), Department of Transportation VANITS, GSA Connections, U.S. Air Force DESP II, and other large GWAC contracting vehicles.

Register now *at www.apmpnca.org/events.html*. Space is Limited!

Corporate Partner Guest Host: Enexdi

Agenda: *5:30 p.m. Networking*
6:15 p.m. Dinner (vegetarian entrée upon request)
7:15 p.m. Announcements and Program
8:30 p.m. Adjournment

Registration Fees: *$65 (payment received in advance) or $75 (register at the door; limited seats available and will be filled on a first-come, first-served basis). Cancellation requests must be received via email by 5:00 p.m. on Thursday, November 8 for registration fee refund.*

Corporate Partners: *Please RSVP by November 8 even if using a free coupon.*

Location: *Marriott Fairview Park, 3111 Fairview Park Dr., Falls Church, VA 22042-4550 703.849.9400*

If you plan to attend...*register now at www.apmpnca.org/events.html* and pay online by November 8, 2007 using PayPal, or RSVP via email at ***rsvp@apmp-nca.org*** and mail your check to APMP NCA, POB 3063, McLean, VA 22103-3063.

Use a few simple rules to help keep your graphics looking professional—stay consistent, keep in clean and simple, do your homework, label elements, and use a "smart" color palette.

Before developing and presenting specialty graphic types, icons, symbols, or imagery, be sure your audience understands what it is you are communicating.

Ask the Graphics Guru

Mike Parkinson

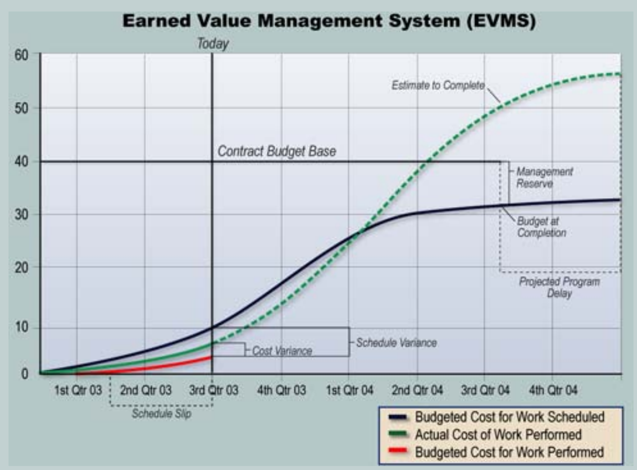
What can I do make my graphics look professional?

In the real world of proposal development, we often have less than optimal time, money, and resources to create the graphics we want. So the question is, how can you ensure that your proposal graphics look as professional as possible with limited resources? Follow these few simple rules and your graphics will look more professional.

Stay consistent. Create and use a template that shows fonts, colors, line widths, and box and icon styles so your graphics and slides will have a consistent look and feel. Internal consistency cultivates a feeling of trust because it indicates to the audience that the information presented was designed through careful consideration. Inconsistency breeds confusion. Changes in graphic style, color, shape, and iconography without your target audience's understanding of the change results in miscommunication. If a change occurs at any point (element to element or graphic to graphic) and no reason is given, confusion is the likely outcome. Alternatively, your audience may link an unintended meaning to the change. For example, changing the color of one box in a graphic indicates to your audience that this box is different. Why? Did you explain the difference? Is it obvious? Is it important? Do not add variables where none are needed. Never assume your audience knows the reason or understands the relevance. Clearly define and establish relevancy of any change in consistency.

Keep it clean and simple. Unnecessary visual clutter and too much data interfere with audience understanding. Focus on your audience's most important questions. You cannot achieve the primary objective if your target audience cannot quickly digest your visual or is confused by the graphic. If your graphic is too verbose or complex, suggest using another standalone graphic to communicate what could not be included in one visual. Avoid using too many different images, lines, shapes, patterns, textures, and colors. Doing so helps eliminate unnecessary visual noise that interferes with your graphic's primary objective. Avoid "fancy" shading, text treatments, and gradients. Most built-in effects (as found in Microsoft PowerPoint) can look hokey and less professional than if you were to leave the element as it is. Most built-in effects result in a cartoon-like appearance that is probably antithetical to your company's goal of being seen as the professional solutions provider. Avoid angled and curved connecting lines. Align your shapes and lines onto a grid to communicate that you and your organization offer structure. It also ensures that your graphic is easier to disseminate.

Ockham's Razor, a widely accepted and proven postulate, asserts that simplicity in all design is preferred over complexity. Unnecessary visual complexity increases the likelihood of audience misinterpretation, confusion, and unintended consequences. There are some instances where seemingly challenging or cluttered graphics are easily read and digested by your *target* audience. For example, an Earned Value Management System (EVMS) graphic might be confusing to most, but would be very clear to those who have learned to read such graphical data. To the trained viewer, the EVMS graphic shows a risk probability schedule. It quickly communicates how potential changes in budget at different milestones can have a ripple effect on future costs.



As always, do your homework. Before developing and presenting specialty graphic types, icons, symbols, or imagery, be sure your audience understands what it is you are communicating.

The "10 second rule" has helped me create successful proposal graphics. There are several interpretations, but I find this definition most applicable—if your target audience doesn't know and understand the main point of your graphic within 10 seconds, the graphic will probably fail to achieve its primary objective. In many instances you

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Using a "smart" color palette is integral to creating effective graphics.

If your goal is to ramp up sales, use your customer's colors whether or not their colors are analogous (even if they are downright ugly).

(Graphics Guru...Continued from page 3)

have far less than 10 seconds. Your goal is to communicate as quickly and clearly as possible.

Unfortunately, I have seen a cluttered, dense, hard-to-understand graphic achieving the primary objective, especially in business graphics. Perhaps the target audience needed that level of detail to understand the concept being presented. However, it is more likely that the audience ignored the lack of clarification and/or explanation. The audience may have chosen this potentially flawed path of reasoning: "The graphic looks good. It has all the terms and elements I needed to see. It looks as complicated as a solution to this problem should be. I don't feel like figuring it out anymore. I've heard this company is trustworthy. It seems good enough to me. Let's move forward." Or perhaps the audience felt that if they asked for clarification they would appear unintelligent. Whatever the reason, although the graphic failed to communicate all intended messages, it succeeded in its primary objective. The graphic used what I call "razzle dazzle"—when the author or designer, purposefully or not, uses attractive or dense visuals or a complicated layout rather than focusing on the audience's need to understand. Was the graphic successful? Only if the goal was to confuse the audience and hope they reached a decision that coincided with the primary objective. This is a poor, potentially unethical tactic.

Label elements directly to avoid confusion. When depicting steps in a process, label them as such. The clearer your labels, the more effective your clarification and/or explanation. As a result, your graphic is more likely to be successful. Avoid legends. Legends add visual clutter and force the audience to waste valuable time deciphering your message.

Use a "smart" color palette. First, a little about color…

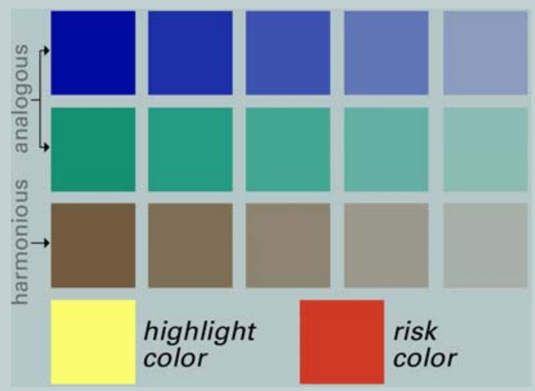
Color consists of three variables:

- Hue—where on the color wheel the color appears;
- Saturation—the intensity or vibrancy of the color; and
- Value—the lightness or darkness of the color.

There are two "families" of colors to be aware of:

- Analogous—colors that appear next to one another on the color wheel like blue, green, and yellow; and
- Complementary—colors that are across from one another on the color wheel like red and green.

Analogous colors are a better choice when developing your color palette because complementary colors vibrate when next to one another. I suggest using two or three analogous colors with multiple shades (or tints) of each. The colors you choose do not have to be analogous, **but** when choosing your colors make sure that they work well together (harmonious). You can use additional colors, but use these color(s) for highlighting or special circumstances.



Which colors should you choose? If your goal is to ramp up sales, use your customer's colors whether or not their colors are analogous (*even* if they are downright ugly). Your customer wants to see themselves in your graphics. If your goal is to increase mindshare, use your company's colors. If you want to play it safe, use blues and greens. (Most Western cultures vote blue and green as the most appealing colors.)

Mike Parkinson is a partner at 24 Hour Company specializing in bid-winning proposal graphics. His Billion Dollar Graphics web site (www.BillionDollarGraphics.com) shares best practices and helpful tools with proposal professionals. Contact Mike at mike@24hrco.com.

Corporate partnership with the NCA Chapter provides a wealth of tangible and intangible benefits to our sponsors.

By supporting NCA, you will strengthen this industry by allowing us to provide training and networking opportunities, while giving you access and visibility to companies with whom you want to be involved.

Partnership Has Its Privileges

Alex Brown

With the year winding down, the time has come to think about where you will put all your hard-earned dollars from 2007. One sure-fire way to guarantee a strong return on investment is a Corporate Partnership with APMP-NCA. For 2008, we have some great benefits in our Corporate Partnership Program.

- Membership from January 1 to December 31, 2008.
- Four FREE Roundtable Registrations. ($260.00 value).
- One FREE 1/2 page ad in the *Executive Summary*, our quarterly newsletter, plus logo placement in every issue ($250.00 value).
- A FREE listing in the online Corporate Partner Buyers Guide with a link to your web site ($100.00 value).
- A FREE exhibit table at Professional Day and one FREE attendee to the event (Value – priceless).
- Recognition at a Roundtable event in appreciation and a framed Corporate Partnership Certificate (included).
- Guest Host ability at one Roundtable including display space, a seat at the head table, speaker introduction, and the ability to say a few words about your wonderful organization (included).

This past year we covered issues at NCA Roundtables ranging from FEDSIM Proposal Evaluation Methods to a discussion about why it is so important for the Proposal Manager to be involved at the corporate level of a business. In May, we held a lively Roundtable talking about the need to create synergy from the written proposal to the orals presentation. In January, we kicked things off with a basic—but often times overlooked aspect of a proposal—the need to simply get the graphics right.

This year, our Professional Day will draw close to 300 attendees. Imagine being able to reach that many decision makers in one day! Our topics are pertinent and timely and reach many who don't attend the Roundtables.

For $500.00, you will have access to over 600 peers throughout industry coming from the most influential companies in the DC metro area. If your business is here, this is the place to be. You'll have the ability to attend four Roundtable discussions that will provide lively discussions on a topical issue and allow for networking with decision makers from around the area. One of the most important benefits is simply name recognition—your ad, your logo, and your company site will be seen by hundreds.

By supporting NCA, you will strengthen this industry by allowing us to provide training and networking opportunities, while giving you access and visibility to companies with whom you want to be involved.

To become a Corporate Partner, please contact Alex Brown at 301.771.3245 (w), 301.356.2909 (c), or alex@apmpnca.org.

Writers' Roundup

Writing for Results

Patricia Kent

High school English teachers (like me) don't retire, they just go through a professional metamorphosis from the world of academia to that of business. Oh, and they can be a clever group. Their transition is so well done, it is hardly noticeable. And why shouldn't it be? After all, the need for good, basic writing skills is universal; and the goal is basically the same—to produce clear, concise documents. The only difference for them really is the age and focus of the audience. Their new audience isn't students vying for good grades, but rather professionals competing for business in the real world. So, often posing as proposal managers (guilty as charged), these transformed individuals delight in helping the business writer turn last-minute, late-night assignments into coherent prose.

Obviously, writing is an essential, daily activity of every business—marketing new and existing products, delivering information, selling one's expertise, and sealing contractual agreements. These are all forms of written communication. And regardless of the document's purpose, length, and degree of complexity, it graphically represents you and your company's image, credibility, and commitment to quality. Whether documented on paper or transmitted electronically, effective writing demands accuracy and attention to detail. Achieving the right results requires planning, organization, and objectivity. So let's quickly run through a simple three-point check list (and let's be honest):

- **Organization**—Would you say your writing content is always logically organized from a few-

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Joseph Jablonski profiles the business development life cycle with tips to best position your company for the win.

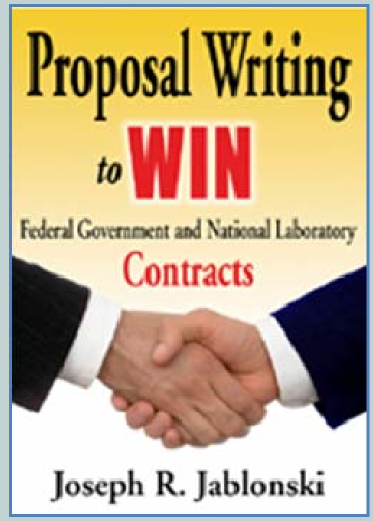
Book Review—Quick Answers without Asking for Help

Michael A. Scruggs, PPM.APMP

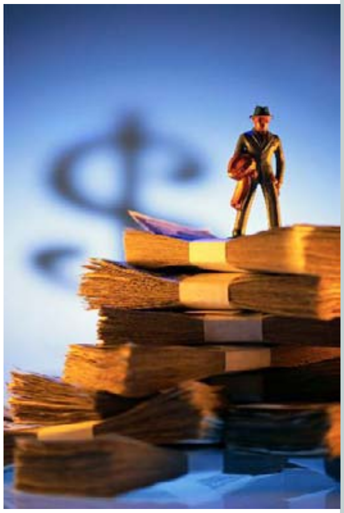
Joseph Jablonski supplied a copy of his book Proposal Writing to Win as a give-away at a recent NCA Roundtable. Thumbing through it made me quickly realize that this is a powerful reference that can rapidly bring you up to speed on those capture- and proposal-related topics you don't want to ask about out loud. The title of the book is a little deceiving because it covers much more than proposal writing.

The book's focus is solely on Federal Government opportunities and effective ways to win contracts. Jablonski profiles the business development life cycle with tips to best position your company for the win, and he provides a primer describing the various types of contracts, opportunity research methods, and performance-based contracting.

The book is relatively small compared to most proposal reference material, allowing for an easy fit into your computer bag.



If you are new to Federal contracting, this book will bring you up to speed quickly. At less than $50, it's a value and highly recommended. Learn more at www.proposalw.com.



The SCA does not dictate what a contractor should bid, only what it must pay covered employees.

Legal Corner

The Service Contract Act (SCA): Proposal Pitfalls

Shlomo Katz

The Service Contract Act (SCA) is a law that requires the payment of specified minimum wage rates and fringe benefits to employees working on U.S. Government service contracts and subcontracts in the United States. While the goal of the law is straightforward—to prevent service workers from becoming the casualties in the competitive wars between Government contractors—the implementation of the law presents pitfalls for contractors who prepare their proposals in ignorance of what the Act requires and how it works in practice.

When a Federal Agency intends to award a contract that is covered by the SCA, it must obtain a wage determination (WD) from the U.S. Department of Labor (DOL). A WD is a document that covers a specified geographical area and lists the minimum wages and fringe benefits that the service contractors in that territory must pay to dozens of classes of employees. The WD becomes a part of the solicitation and, later, of the awarded contract.

Bidding Below Cost

The first rule that offerors should remember is that the SCA does not dictate what a contractor should bid, only what it must pay covered employees. Therefore, "[A]n offer for a fixed-price contract submitted at a price that appears lower than the cost of wage rates applicable pursuant to the [SCA] is nonetheless acceptable where the offer does not take exception to, or otherwise evidence an intent by the offeror to violate, the requirements of the [SCA]." If a contractor chooses to bid at a loss or to finance the contract with its profits, that is not a basis for disqualifying the contractor's offer or bid.

Implementation of the SCA presents pitfalls for contractors who prepare their proposals in ignorance of what the Act requires and how it works in practice.

Collective Bargaining Agreements and The Successor Contractor Rule

There are two ways that DOL can determine the wages and benefits payable under a given contract. One way is by surveying prevailing wages for the applicable trades in the contract's geographic market. Alternatively, under Section 4(c) of the SCA, a contractor that replaces a contractor that was subject to a collective bargaining agreement (CBA) is required to pay its employees not less than the wage rates and fringe benefits that the predecessor would have had to pay under the collective bargaining agreement. This includes the obligation to pay any prospective increases provided by such agreement.

Accordingly, a bidder must inquire before pricing its bid or offer whether a CBA exists. The solicitation should contain this information, but might not. A copy of the applicable CBA usually can be obtained from the contracting agency or from the union. Note that the so-called successor contractor rule is limited to wages and fringe benefits. Successor contractors are not required to adopt the seniority systems, grievance procedures, expense reimbursement, or work rules in the predecessor's CBA. It makes sense to have counsel examine the incumbent's CBA before you bid to determine what parts of the CBA are binding on you and which are just work rules or other nonbinding requirements. This analysis can be very complex.

Your own CBA does not affect the wages that you must pay under the SCA, unless, of course, you happen to be the predecessor contractor. Be aware that DOL regards each option period as a new contract for SCA purposes. Accordingly, a contractor can be its own successor, such that the CBA that the contractor negotiated during one year of its contract will become the basis for its SCA obligations in later years of its contract. (Even in the first year, if your CBA requires higher wages or benefits than the predecessor's CBA, you must pay those higher wages as a matter of contract and labor law.)

What to Include in Your Bid or Proposal—Vacation Pay

A bidder who will be taking over an existing workforce should investigate the seniority of that workforce. The reason for this is that vacation benefits are a fringe benefit normally set by the WD and, typically, the number of vacation days vary based upon the employee's years of service. For example, a WD may allow one week (e.g., 5 days) of vacation after one year of service, two weeks after three years, etc.

Note that this vacation does not accrue during the year. Accordingly, if the employee has less than one year of service, under such a WD he or she would not be eligible for any vacation. If that employee quit after 11.5 months, there would be no obligation under Federal law to pay that employee any monies for accrued vacation.

The contractor for whom the employee is working at the time the vacation right vests must provide the full benefit to which the employee is entitled based upon the length of continuous service with the present contractor and with predecessor contractors at the same Federal facility. Thus, you, as a successor contractor, may end up paying for vacation that an employee earned while working for the predecessor

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Regardless of a document's purpose, length, and degree of complexity, it graphically represents you and your company's image, credibility, and commitment to quality.

(Writing Hints Column...Continued from page 5)

line e-mail to simple paragraphs to multiple pages? Do you provide readers the necessary "sign posts" for ease of understanding and comprehension as they move from one point to the next?

- **Content**—Does the content meet all response criteria? Does it answer all requirements with the *right* information and the *right* level of detail?
- **Grammar and Style**—Do you write to your audience's level of knowledge and understanding by not writing over the reader's head? Do you maintain consistent tone, voice, and person? Do you try to keep your sentences to 20 – 25 words in length? Do you use only needed words and appropriate transitions? Do you limit acronyms to only those that are really necessary, and are they defined at first use?

Granted, these points are high level and should rightfully be dissected for much deeper examination. BUT, if they give you pause the next time you put fingertips to the keyboard, then this ex-English teacher—now proposal manager—has succeeded in her career transformation.

Look for Patricia Kent's regular writing column in the APMP-NCA newsletter next year. She'll be providing some of that "deeper examination."

What Keeps You Awake at Night?

If you have recommendations on subjects for upcoming Roundtables that would be helpful to you or your team—or better yet—if you also know of a potential guest speaker, please contact APMP NCA at www.apmpnca.org/contact_us.html or send your ideas to *info@apmp-nca.org*.

The only time I used a library's carrel space was when I needed to seriously cram for an exam, and I hated every minute spent in that space. It's the last place I would voluntarily choose to work.

(President's Corner...Continued from page 1)

I ordered several large, porcelain, steel white boards. Because they are steel under the white porcelain surface, they are magnetic. Lots of white space with maximum functionality is the way to go.

The equipment fun came with purchasing and installing an electronic wall projector screen that was operated by a wall switch. This was a massive white fabric screen that fit into the ceiling. One lesson learned is that electrical installation is very expensive when using existing wiring, as the electrician cost more than my screen.

The digital ceiling projector also required special wiring, adding to my cost. I selected a "multimedia" projector because it could accommodate any laptop or DVD player. I learned that brightness is key in picking out projectors—the more "lumens," the better projection image.

With projection system in place, picking chairs was not hard. With plenty of budget, nothing beats Herman Miller's Aeron black-mesh office chair. I even ordered some of the larger sized chairs for team members needing lots of seating space.

As things came together, the vice president announced that she wanted to duplicate the proposal working environment of her old company. From her first description, I thought she wanted modular office furniture. But after further discussion, she envisioned one large study carrel, the type you would see in the university library.

For me, the only time I used a library's carrel space was when I needed to seriously cram for an exam, and I hated every minute spent in that space. It's the last place I would voluntarily choose to work.

The vice president was rigid on this requirement. With an office furniture designer, we planned a customized carrel with 10 attached workstations, each with a 3-foot wide and 2-foot deep workspace. Each had its own florescent lighting with electric and network connections.

I really felt bad about how this was working out because I envisioned a workspace that would promote communication among the team and a special place to work. All I wanted were the basic tables you see in most meeting rooms. Instead, the massive, custom-made carrel arrived and was installed.

(Continued on page 14)

Registration far exceeded previous Professional Day events.

(Professional Day...Continued from page 1)

This buzz of activity was further enhanced by attendee interaction with the 16 vendors who dotted the facility outside the auditorium with enticing information on how to make the life of proposal and capture managers easier and more successful. The proposal industry offerings covered the full spectrum of services—staffing professionals, proposal process management, graphic design, capture management, and training. And to the delight of all, many of these exhibitors donated door prizes (see inset).

Video clips of the panel discussions will be available on the APMP-NCA web site (www.apmpnca.org) by mid-November.

Attendees interacted with 16 exhibitors who offer outstanding proposal-related products and services.

Key Points from Our Speakers

Panel: Government Feedback on Improving Proposals

Professional Day attendees took away a number of tips for improving their proposals:

Professional Day Chairperson, Bob Lohfeld; Speakers Kristen Knapper, Joann Underwood, and Tiffany Hixson; Moderator Bob Guerra.

- Read the RFPs thoroughly; make sure you understand all sections and how they relate to one another.
- Answer the requirements by explaining how your approach will provide the services, how it will mitigate any associated risks, and how it will benefit the customer.
- Include a well thought-out transition plan—especially important for incumbents. Don't take the Government's concerns for contract and technology changes lightly.
- Explain in detail how you will use subcontractors to provide services.
- Use past performance summaries that are similar in size, scope, and complexity; provide two or more contact references and make sure the contact information is accurate.
- ASK questions if discrepancies or contradictions are found in the RFP; it is your responsibility to get clarification.

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A Special *Thank You* to APMP-NCA's Corporate Partners

Alex Brown

With the pageantry of Professional Day behind us, the NCA Board of Directors would like to issue a special thank you to each of our Corporate Partners—their generous support is a major contributor to our continued success. Each Corporate Partner in their own way donated time and door prizes that added a special value-add to the winners at Professional Day.

- APMP donated an autographed copy of Andy Bounds' *The Jelly Effect: Making Communication Stick*. (www.apmp.org)
- The BOSS Group provided a $100 AMEX card. (www.thebossgroup.com)
- Captureplanning.com contributed their *Best of CapturePlanning.com* book. (captureplanning.com)
- G4i's contribution of a G4i Shredder was a nice give-away. (www.govg4i.com)
- OCI supplied a $100 AMEX card—a popular give-away. (www.oci.com)
- Octant blew the house away with a Magellan Roadmate 2000 (GPS). www.octantsoftware.com)
- Shipley Associates generously provided a Shipley 2-day workshop registration. (shipleywins.com)
- Synchris, Inc.'s gift of an iPod Nano was a very sought-after door prize. (www.synchris.com)
- Voice for Success's complimentary executive coaching session is a value-add to any company. (www.voiceforsuccess.com)
- Lohfeld Consulting Group, Inc. sponsored the Morning Break catering—happily enjoyed by every attendee. (www.lohfeldconsulting.com)

We on the NCA Board recognize that such generous contributions enhance our Professional Day tremendously. In addition to the outstanding speakers and the opportunity to network with our colleagues, these gifts added spice to an already full and satisfying event. Each year we depend on our Corporate Partners to come through for us, and year after year, they do an outstanding job of supporting our NCA Chapter!

(Professional Day...Continued from page 10)

Speakers Gillian Dionne and Betsy Blakney; Bob Lohfeld.

Panel: Trends in Proposal Development and Evaluation

Professional Day attendees heard insights on proposal development and evaluation trends from their industry colleagues:

- Acquisition releases are slipping, even after the first draft is distributed.
- User-community participation on Source Selection Boards (SSBs) is shrinking.
- Companies and the Government are requiring bidders to register and qualify online.
- The consolidation of small and mid-tier contractors continues—if you are consolidated, remember that the statement "we always did it this way at company XYZ" is toxic.
- Good proposal people are hard to find and keep. Invest in your people's skills and professional development.

Panel Experts: Edward Becker, Jonathan Rodriguez, and Bob Weissman.

Panel: Executive Summary Best Practices

Tips on preparing effective executive summaries included:

- Develop the executive summary using best practices like the three-column planner.
- Prepare the executive summary as early as possible and acquire executive buy-in.
- Don't use graphics that are too complicated, require the reviewer to "fill-in the blanks", or are inconsistent with the rest of the proposal.
- Prepare clear, concise graphics that command attention and convey your message in a glance.
- Be very careful of review team input. They have spent two days reviewing the RFP, and in most cases they have no customer contact.
- Be creative. Don't be afraid of "motherhood." It works for Chevy and every political candidate.

Panel: Task Order Management Best Practices

Task order management advice from our Government and industry experts included:

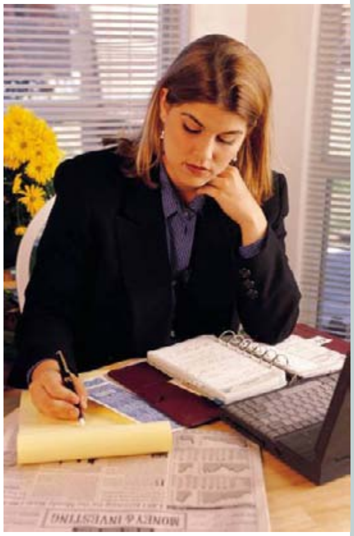
- You need to say more with less! Sentences are gold nuggets…every one must count!
- There is more emphasis on proposed people. Demonstrate your candidates' relevant experience, and explain how their experience will benefit the customer.
- The Alliant Program discourages offerors from submitting proposals that fail to convey the value of the solution. Do not adhere to proposal guidelines in the RFP or ignore the evaluation criteria.
- The Alliant Program encourages offerors to submit proposals that demonstrate increased efficiencies, cost savings, and innovative technologies.
- Assist Alliant Source Selection Board members by cleanly mapping evaluation criteria to your proposal.

Task Order Management Panel Moderator, Pat Kent; Speakers Jim Ghiloni and Jack Pease.

Summary

Professional Day closed with a valuable lesson in the art of networking from one of our area's leading authorities on the subject, Ardell Fleeson, who has been crowned as Northern Virginia's "Queen of Schmooze" and the "owner of the Golden Rolodex." According to Ms. Ardell, you should always come to an event with a networking goal, bring business cards, wear a highly visible name tag on your right shoulder, and eat before you start networking.

Ardell Fleeson, Northern Virginia's "Queen of Schmooze" and the "owner of the Golden Rolodex."



Users of NCA's Job Board know that the audience has already been winnowed to people with the right skills or jobs with the right requirements.

NCA's Job Board Works For Employers and Job Seekers

Rick Patterson

Neither Chris nor Lorenzo knew in December 2004 that they had started a new, exciting program for APMP-NCA. But, they were the first two of over 75 users of the NCA's Job Board.

The NCA Job Board enables employers to post "help wanted" ads on the NCA web site. It helps them find qualified people to fill vacancies in the proposal professional and business development fields. It also works for the individual proposal manager, graphic artist, or business developer. They see the positions that are open in the Washington, DC area (including northern Virginia and southern Maryland). One posting was for a vice president of business development for a small company in Little Rock, Arkansas, but postings out of this area are rare.

Both employers and employees like to use this job-posting service because it reduces the workload of searching through all those resumes or job postings. They know that the audience already has been winnowed to people with the right skills or jobs with the right requirements. Employers also like its cost competitiveness. For $60, posting are shown on the NCA web site for 90 days—less than $.70 per day.

NCA Job Board use is growing. In 2004, only three jobs were posted on the site. In 2005, postings grew to 29. In 2006 the Job Board had 39 listings. As of October 1, 2007, 33 posting have been displayed. The NCA Ombudsman is contacting each of the Job Board users to help analyze the Job Board's effectiveness. Their responses will help make this important service more useable to the proposal professional and business development community.

You need to define what is required for a proposal to win and manage pre-RFP activity to deliver it.

Managing The Transition From Business Development To Winning Proposal

Courtesy of Carl Dickson, CapturePlanning.com

The biggest problem with the transition from business development to proposal is that there is any "transition" at all. A proposal is nothing more than the closing of the sales process. It is not a separate process, but the completion of a single process.

Companies do everything they can to disrupt this single process. They bring in new management and new staff. They reassign the previous management and staff. The information collected by the business developers is often discarded or is not formatted in a way that is useful to the proposal. The two phases are managed with different goals and procedures. The business development phase is often managed as if the goal is to achieve the client's permission to submit a proposal and nothing more. The two phases are even incentivized differently. There is little or no integration between them. Business development and proposal development are treated as two different things, until they become two different, unrelated, and not integrated processes.

When you define the proposal as the closing of the sales process, then the portion of the process that occurs prior to RFP release should be aimed at preparing for a successful close. To do this, you need to define what is required for a proposal to win and manage pre-RFP activity to deliver it.

Some of the things required for a proposal to win include:

- A positive client relationship.
- Proper positioning of the company and offering.
- An offering that better reflects what the customer wants than the competitions' offerings.
- Customer and opportunity intelligence that enable you to understand the client's preferences and write a winning proposal.
- Competitive intelligence that enables you to outmaneuver the competition.
- A top evaluation score.
- A price that is perceived as the best value.

One excellent way to approach designing this process is to build it around the questions that you need to answer.

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(President's Corner...Continued from page 9)

We had our first kick-off meeting about a week later, and it was a disaster. Team members liked the Aeron chairs, but they didn't like the carrel spaces. Functionally, it was hard to see who was speaking, and no one liked the relatively small surface area of each individual carrel space. Viewing presentations on the screen was difficult.

Over the next months, team members would retreat to their offices as soon as a meeting in the war room was adjourned. Even in an open cubicle with little or no privacy, team members felt much more comfortable in their own personal space. No one wanted to work in the "slave pit".

What about the second war room?

I obtained several beat-up meeting tables and a suite of used leather conference chairs from an old executive meeting room, and I installed some white boards found in the building manager's storage room. I cobbled together the usual equipment—a portable smartboard, paper shredder, and printer—and purchased a teleconference phone system. This room was used all of the time. Members of the proposal team wanted to see one another, and standard tables and chairs did the trick.

And the vice president? She never spent time in either room.

After she retired, the carrel was dismantled and hauled to a landfill, and standard tables were installed. Once capture and proposal teams could communicate face-to-face, there was a three-day advanced reservation to use the room.

Companies that want the best work out of their employees should listen to the users' needs. Windows, good lighting, pleasing colors, first-class technical equipment, comfortable chairs, and open work spaces are signs that the company is committed to the proposal team. In return, I believe, providing a pleasing and creative work environment leads to better proposals—and better proposals lead to increased corporate revenue and growth.

(Business Development to Proposal...Continued from page 13)

For example, you can target your customer, opportunity, and competitive intelligence gathering efforts at the questions you need answers to in order to successfully close the sale with a winning proposal.

This does not mean that the proposal phase of activity directs the business development phase. The proposal is only part of what is needed for the sale to successfully close. The process should be designed and implemented from a perspective that integrates or is above both the business development and proposal activities.

That is why assigning a Capture Manager, in addition to a Business Development Manager and a Proposal Manager, is a best practice. A Business Development Manager typically pursues a portfolio of opportunities. A Proposal Manager is focused on preparing a winning document. The Capture Manager fulfills the need for someone dedicated to the pursuit of the opportunity who can integrate the Business Development and Proposal activities.

A Capture Manager can ensure that the way intelligence is gathered flows into a winning close to the sales process. A Capture Manager is the glue that binds the two parts into a single whole. For this to work, the Capture Manager must be involved once the lead is qualified to help the business development efforts work towards setting the stage for a winning proposal. This means gathering the right information for a winning proposal and doing all the things (other than the proposal itself) that are necessary for a successful close to the sale.

Legally-mandated benefits...do not count towards meeting the employer's SCA obligations.

(Legal Corner...Continued from page 7)

contractor. The contractor must provide the benefit either in vacation time or payment before the employee's next anniversary date, before completion of the contract, or before the employee terminates, whichever is first.

What to Include in Your Bid or Proposal—Fringe Benefits

SCA WDs include prevailing fringe benefits for the various classes of service employees. Such fringe benefits include health and welfare (H&W) benefits such as medical or hospital care, pensions on retirement or death, compensation for injuries or illness resulting from occupational activity, and other insurance and may also include vacation and holiday pay. Legally-mandated benefits such as workers compensation, FICA, and FUTA do not count towards meeting the employer's SCA obligations.

WDs may express H&W benefits in one of two ways, with different consequences. One is a fixed amount for every hour of work (e.g., "$3.16 per hour or $126.40 per week or $547.73 per month"). The regulations explain that this type of WD actually requires the contractor to provide benefits for all hours paid, but only to 40 hours per week or 2,080 hours per year, including vacation, holidays, sick pay, and any other paid hours paid. (These WDs usually have identifiers ending with odd numbers.)

Other WDs state an average benefit per hour worked. This is an average rate per hour, which must be provided for straight time and overtime hours worked, not hours paid for. Thus, vacation, holiday, and sick pay are not counted. However, the requirement is measured by the average of all H&W payments—in cash or fringes—to all employees working contract-wide. Thus, some employees could receive more or less than the average, even possibly zero, and the requirement for the average payment could be met. (These WDs usually have identifiers ending with even numbers.)

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

(Continued on page 16)

The difficulty in arriving at conforming rates is that a contractor must attempt to second-guess the Administrator.

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.

(Legal Corner...Continued from page 15)

skill comparison. The regulations state that "a pay relationship should be maintained between job classifications based on the skill required and the duties performed."

Ideally, a contractor should do a mini-conformance as part of the 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 to 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 W&H 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 DOL'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. 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. 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. There are several things to know about the Price Adjustment clause.

First, 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."

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. 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.

Finally, 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." The purpose of this warranty is to prevent double recovery of nonexempt employee labor escalation costs. Under the clause, the contractor will get an "inequitable 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.

Shlomo D. Katz is Senior Counsel in the Washington, DC office of the national law firm of Epstein Becker & Green, a Corporate Sponsor of APMP-NCA. If you have any questions about these or other proposal issues, please contact him at 202.861.1809 or skatz@ebglaw.com.

Chart your new course using NCA's Job Board at www.apmpnca.org/find_a_job.html.

NCA Job Board

As an added value to our members, APMP-NCA has expanded the posting timeframe of our job board listings. Job postings now run on the board for 90 days. The price per posting is $60. Check out www.apmpnca.org/find_a_job.html.

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Background

APMP, in collaboration with the BD-Institute, has created a body of knowledge for APMP members. The BD-KnowledgeBase™ identifies practices, process elements, and tools that are generally recognized as key practices and hallmarks of the business development discipline. It provides:

- Managed resource for the key practices within the business development profession
- Foundation of facts and competencies for certification.
- Reference guide with practical applications for the BD-CMM model

The BD-KnowledgeBase was introduced to members at the 2006 Annual Conference in Savannah, GA. This "jump-start" version was built from readily available sources such as the *Journal of the Association of Proposal Management Professional, APMP Perspective,* and US, UK, and regional conference presentations.

Information included it the KnowledgeBase™ met three criteria.

1. Be considered useful to APMP members and other BD professionals
2. Represent and support BD-CMM key practices
3. Complement the APMP Certification Syllabus.

For more information contact Charlie Divine, Chairman of the BD-KnowledgeBase™ Working Group, at *cdivine@bd-institute.org*.

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How Do I Join the NCA Chapter?

It's easy to join the National Capital Area (NCA) Chapter, and it's free. If you are just joining APMP (www.apmp.org/siteSpecific/customer/register_accountData.aspx), simply note on the APMP application that you wish to affiliate with the NCA Chapter. That's all you need to do—APMP will provide your information to NCA, and we will include you in our mailings.

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With almost 600 members, NCA is APMP's largest chapter. Joining NCA allows you to learn about our latest networking and presentation events. Best of all, it's free.

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Executive Summary

A Publication of the Association of Proposal Management Professionals (APMP) National Capital Area (NCA) Chapter

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Our Chapter's Mission is to provide our members with information and opportunities to improve their professional performance and advance their careers in Proposal and Acquisition Management.

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APMP-NCA Board of Directors Meetings Open to Members

The Board of Directors for APMP NCA meets the first Tuesday of every month. Every other meeting is a virtual meeting-telephone conference. These meetings are open, and APMP members may attend.

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

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