GOVERNMENT & COMMERCIAL PROPOSALS

PROPOSAL BEST PRACTICES

PROPOSAL INDUSTRY NEWS

PROPOSAL TIPS, TRICKS, & SECRETS

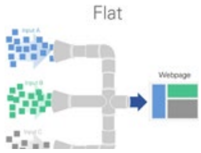
NCA APMP NATIONAL CAPITAL AREA

EXECUTIVE summary

Fall 2014 | Volume 21, Issue 4

This Issue's Theme: **Time Capsule – A Look Back at 2014, and a Look Ahead to 2015**

Inside:



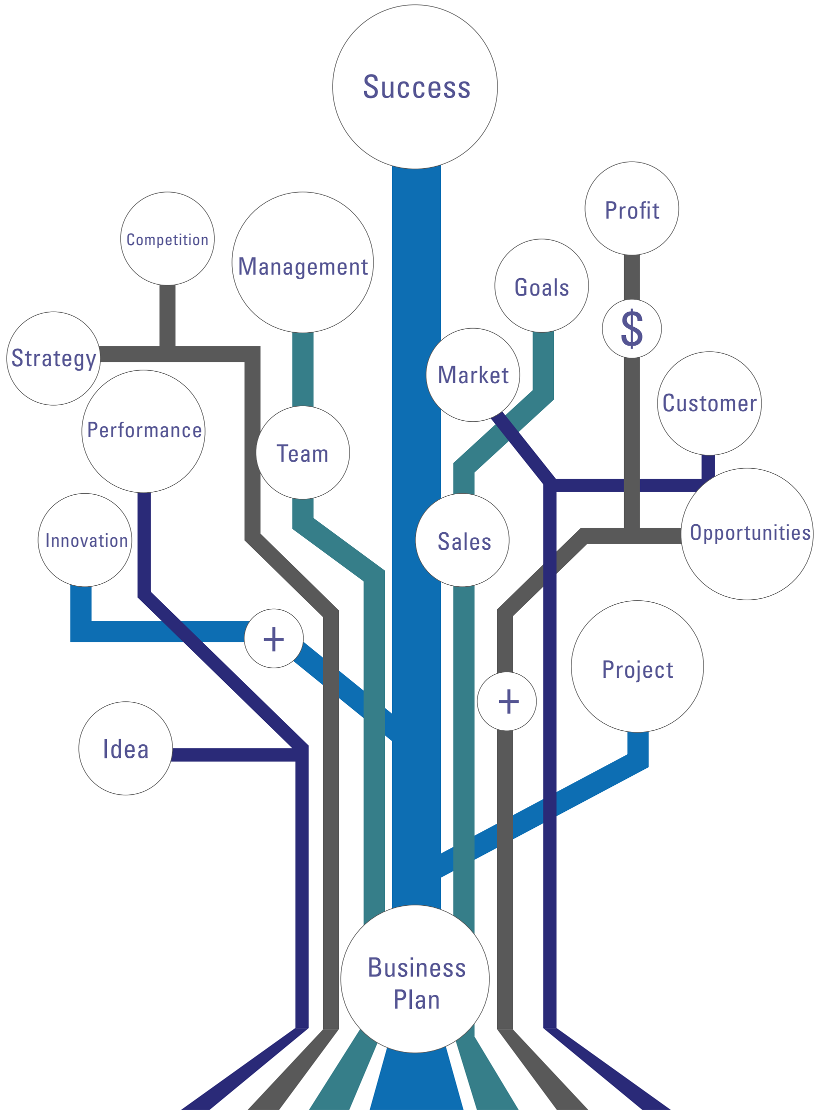
A Publication of the Association of Proposal Management Professionals (APMP) National Capital Area (NCA) Chapter

President's Corner

APMP-NCA – a Look Back and a Look Ahead

by Maryann Lesnick, CP APMP, PMP, MOS, ACT-IAC Fellow

A huge Thank You to the APMP-NCA 2014 Board of Directors (BOD) and the dozens of others who have volunteered their time and talents this year to the NCA chapter. The following are a few things we accomplished in 2014, beginning with many very exciting, fun and career-enhancing events.



APMP-NCA 2014 Event Highlights

- January Member Appreciation Event (Free!): A huge party with special guests, the Washington Nationals Mascots (the other Presidents), and 150 attendees
- March Speaker Series: "How to Win Your Next Recompete," with 110 attendees
- May Speaker Series: "The Price is Right … or is it?" with 75 attendees
- Free Membership Reception at the APMP Bid & Proposal Con in Chicago, with 75 attendees (registered)
- June Special Event: Capture Breakfast, with 65 attendees
- July Speaker Series Breakfast: "Winning and Leveraging IDIQs in a Shifting Market", with 65 attendees
- October 22 Speaker Series: "What do Proposal Evaluators REALLY Want?" (the numbers are not in)
- November 21: Hosting the Mid-Atlantic Conference & Expo, where 41 respected industry subject matter experts who will deliver 27 training seminars; attendance of 250+ anticipated again this year
- November 20: Professional Development Day (prior to the Conference), offering 5 classes on topics ranging from FAR training to Capture, and APMP Foundation level certification.

Additional APMP-NCA 2014 Accomplishments

- Published 4 quarterly eZines
- Completed a revamp of our IT infrastructure, including the NCA website with scalable, updated interfaces (apmpnca.org)
- Increased membership in the APMP-NCA LinkedIn Group from 1,300 to almost 1,600 members; also created a corporate page for the NCA chapter on LinkedIn

- Almost doubled Twitter and Facebook memberships (to 400 and 80 respectively)
- Continued the 5-Fact Friday emails, a concept initiated in 2013 by our Promotions Chair, Ben Skelly – short messages which provide highlights of what is going on in the Chapter each week
- Maintained our Chapter-affiliated membership level at just over 1,000 members
- Had 14 Corporate Partners who introduced members to top-notch talent and shared with us their skills, offerings, tools, and resources
- Gave away free APMP memberships, free attendance to NCA events, and a free registration for the 2014 APMP International Bid & Proposal Con; awarded a scholarship to a future industry leader, Erin McLain
- Won two awards at the 2014 APMP Bid & Proposal Con: the Chapter Communications Award to the NCA Chapter, and the Future Leaders Award to Constance Dyson for establishment of the NCA Mentorship program

Which brings me to the most exciting accomplishment of 2014: NCA completed the first year of our Mentorship Program, enabling 10 individuals to receive guidance from a mentor and advance their careers. Several protégés completed their APMP certifications. The Mentorship Program was created in conjunction with and as part of our new NCA Professional Development Committee. The Professional Development Committee was established to *pay it forward* and support growth by promoting the APMP Certification Program and offer relevant, career-enhancing educational opportunities for our members. Out of this effort, a scholarship to the APMP Bid & Proposal Con was established. The 2014 awardee, Erin McClain, a protégé, also joined and served on the Professional Development Committee.

A few ways the mentor-protégé teams engaged in 2014 included:

- One-on-one lunches
- Reading and discussion of books on a professional or career enhancing topic
- Shadowing a major proposal meeting (kickoff, color review, production, etc., when feasible)
- Attending an educational or networking event together.

The Mentorship program supports APMP Foundation, Practitioner and Professional level certification testing, with the Foundation exam offered in November on the day before our APMP-NCA Mid-Atlantic Conference. Protégé graduation will be held November 21st at the end of the conference.

Participants receive learning material from industry leaders, including the Shipley Proposal Guide. APMP-NCA provides each mentor with a $200 stipend to reimburse some of their expenses, and mentors also receive 3 CEUs at the end of the program. As an added bonus, the protégés receive half-price admission to all chapter events.

2015 is going to be an exciting year for APMP NCA! Look ahead to see what we are up to.

In May, NCA's Board of Directors delivered a briefing about the Mentorship program at the Chapter Leaders meeting in Chicago, and several other chapters are adopting similar programs for 2015.

A look ahead to 2015

There is still time to be a part of the Mentorship program for 2015. Commitment to the program is required, and participants should plan to set aside time (4-8 hours each month) to meet or otherwise engage with each other. Interactions can be virtual or in person – whatever works best for you. The timeline for the 2015 Mentorship program is as follows:

- Begin accepting applications in August (LINK)
- Review applications and match mentor pairs based on location, goals, skills, experience, and credentials
- Hold a mentorship kickoff ("meet and greet") in December 2014
- Begin interactions in January 2015
- Hold two mentorship meet-ups with all mentor-protégé teams,

with dinner and an educational program
- Hold graduation at the 2015 Mid-Atlantic Conference & Expo.

We will be kicking off a new mentoring class in January, with some of the mentoring teams continuing on for a second year. Please consider joining us! Our Professional Development Committee will also begin to track and monitor certifications and CEUs of our chapter members beginning in 2015.

APMP-NCA created a new committee for 2015: the Knowledge Management Committee. This committee will be responsible for collecting data and providing solutions that improve access, usability, and quality of the chapter's knowledge base. The Knowledge Management (KM) committee will assess, organize, and improve the APMP-NCA Body of Knowledge (BOK) resources on our website.

The APMP-NCA chapter has many committees you can join. These committees represent key areas of Chapter operations and the work of these committees sets the agenda for the Chapter each year. One area that is most rewarding to all who serve is the Annual Events Committee for the Mid-Atlantic Conference. The conference is held in the fall and is the largest event of its kind in the mid-Atlantic area.

In addition to the Knowledge Management and the Annual Conference, our Committees also support:

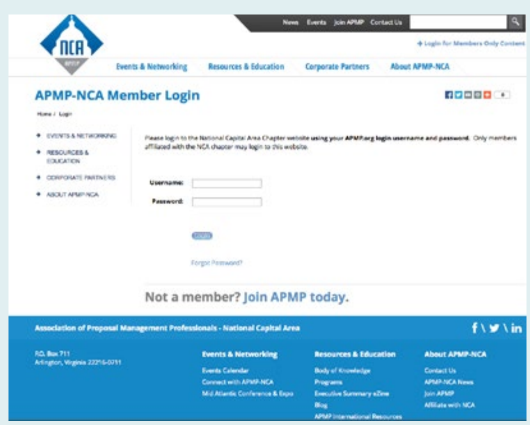
- Speaker Series events
- Membership
- Event registration and logistics
- Education and mentoring programs
- Networking events
- Technology
- Publicity
- The eZine newsletter.

I look forward to a wonderful 2015 and invite you to volunteer to be a part of the APMP-NCA journey!

President, Maryann Lesnick, CP APMP, PMP, CSM, MOS – A Principal Consultant at Lohfeld Consulting, Maryann served as the Vice President of the NCA chapter in 2012-2013, as the 2011 Logistics Chair, on the Boot Camp Committee in 2008-2009, and as Boot Camp Chair in 2010.. Maryann is a Practitioner Level APMP certification mentor, an ACT-IAC Fellow, a Certified Scrum Master, a CMMI Level 2 Internal Assessor, ISO 9000 Internal Auditor, certified Microsoft Office Specialist (MOS), and holds a BS in Mathematics and MS in Information Technology Management.

APMP-NCA Members!

When was the last time that you logged into apmp.org and updated your profile information? It is easy to do and only takes a few minutes. Log in, and under "My Profile" go to Manage Profile and click on Edit Bio. Update your information and click on the blue "save changes" button at the bottom. It is that easy. Having your correct contact information makes it easier for the NCA Chapter to keep you informed on upcoming events and activities.



Ask the Graphics Guru

What Proposal Graphic Trends Are You Seeing?

by Mike Parkinson, CPP APMP Fellow

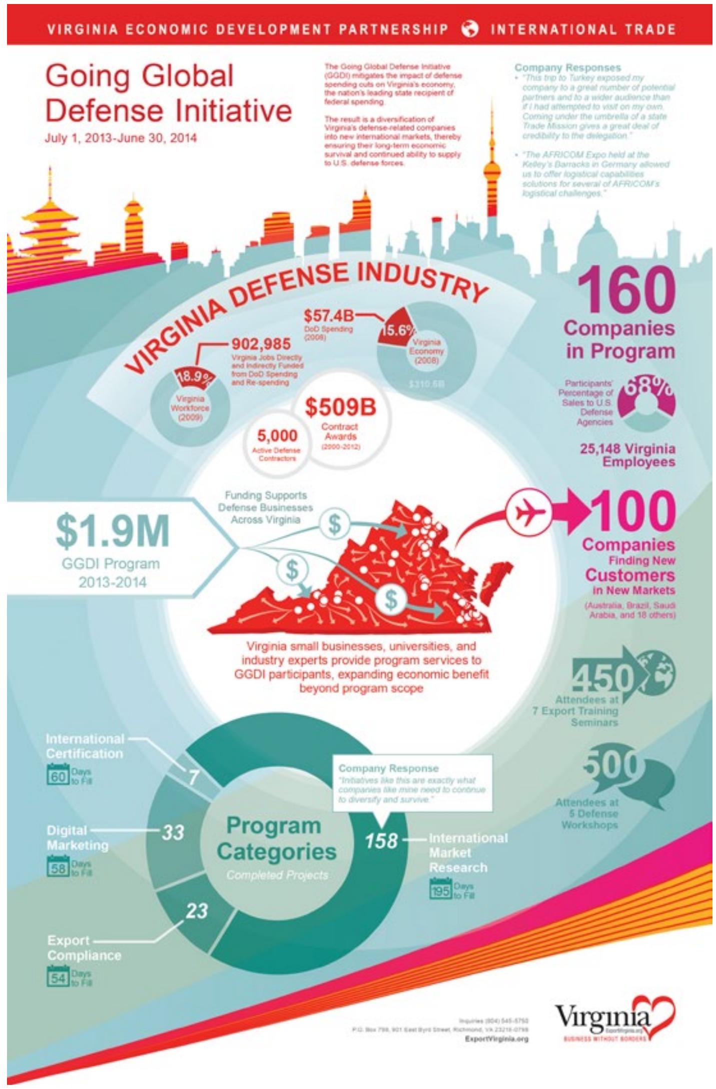
Change is inevitable. Over the years, the proposals we produce, the tools and processes we use, and our industry have evolved. The following are three graphic trends I have seen in the last year:

1. Infographics
2. Flat Design
3. Concepting/Solutioning with Graphics

1. Infographics

The ubiquity of infographics has spilled into the proposal industry. There are more mandates and requests to include them in proposals.

The contemporary definition of an infographic is a visual representation of information, data or knowledge intended to improve our understanding of complex information. It is important to note that the strictest definition of an infographic is any graphic that clarifies or explains. Recently, the term infographic has become synonymous with a specific style of graphic (and not a definition), which is typically visualized as aesthetically simple and flat using quantitative data to educate and persuade (see example to the right).



Graphic courtesy of 24 Hour Company (www.24hrco.com).

A successful infographic requires content and messages to be clear and concise. Unfortunately, all proposal infographics I have seen are cluttered and confusing. The message is unclear and text has been replaced with ambiguous images.

Verdict:
Use infographics sparingly. Do them well or don't do them at all. Based on what I have seen to date, infographics tend to work best for commercial proposals.

2. Flat Design

Flat design is now seen as modern design. This evolution has resulted from the popularity of small electronic devices. To improve content legibility on hand-held devices, aesthetic embellishments such as highlights, depth, and shadows were eliminated.

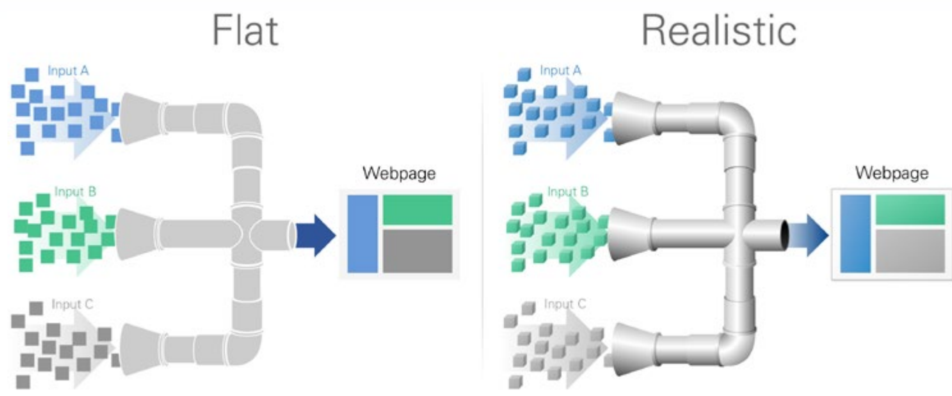
The opposite of flat design is realism (skeuomorphism).

Both have pros and cons. For example, if your goal is to be perceived as fresh and cutting-edge, flat graphics are associated with newer design and, therefore, send the unspoken message that your company and your solution are modern and innovative (i.e., fresh and cutting-edge). Because of its plainness, flat design is often less expensive and time-consuming to produce. On the other hand, flat design can oversimplify or under-explain critical pieces of information. Flat graphics limit aesthetic choices, making it difficult to explain important or subtle concepts. Design realism, however, can communicate the realness of your solution. Furthermore, because realistic visuals are often considered more labor-intensive and highly regarded than those of competitors, using this style can improve the perceived quality of your company and solution, in addition to demonstrating your commitment to the project.

Verdict:
There is a time and a place for both flat and realistic graphics. With a skilled designer, you can mix both into one template in order to reap the benefits of each style. For example, you could use flat icons with realistic graphics. Be sure that your decision to choose flat and/or realistic graphics is driven by objective goals (e.g., legibility, customer perception/preference, brand standards).

3. Concepting/Solutioning with Graphics

In our 22-year history, more companies than ever before are requesting conceptualization and solutioning meetings 3 to 14 months before the



Graphic courtesy of GetMyGraphic.com.

RFP is released. Most involve either collocated meetings or educational workshops—empowering the team to do it themselves.

Concepting and solutioning often occur at the same time. Concepting involves turning words and ideas into graphics. Solutioning is defined as developing a winning proposal solution.

The reason for concepting and solutioning early is to enable each person on the team to understand and agree on the proposed solution, the concept of operations (solution architecture), the messages, and "win themes" before writing the proposal. Visualizing the solution beforehand minimizes rewrites and editing while also saving money and time.

Verdict:
I highly recommend concepting and solutioning. There is no down side. Follow a proven process and improve it over time.

Conclusion

Expect the popularity of infographics and flat design to wane over time, since they are stylistic trends. As with all trends, many have jumped on the bandwagon without considering the implications of their choices. Choose your path wisely and early in order to avoid costly reformatting and wasted effort on bad graphics later.

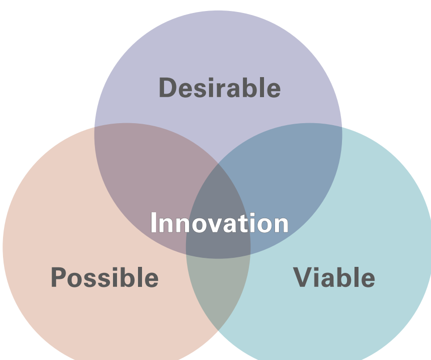
Concepting and solutioning, as opposed to stylistic trends, will increase as companies are requested to do more work with fewer resources while needing every advantage possible to win more proposals. Using concepting and solutioning, you will definitely improve your win rate and lower cost.

Mike Parkinson, PPF.APMP, is an internationally recognized visual communications guru and proposal expert, professional trainer, and award-winning author. He is a partner and head of marketing at 24 Hour Company (24hrco.com) specializing in bid-winning proposal graphics. His Billion Dollar Graphics website (BillionDollarGraphics.com) and Get My Graphic website (GetMyGraphic.com) share best practices and helpful tools with professionals. Contact Mike at mike@24hrco.com or call 703-533-7209.

Capture and Proposal Innovations: The Year That Was and the Year Ahead

by Lisa Pafe, CPP APMP, APMP-NCA Vice President

At the start of Fiscal Year 2014, many made bold predictions of a better year ahead. Post-sequestration, pundits also predicted that the pendulum would begin to swing away from Lowest Price Technically Acceptable (LPTA) and back to Best Value as agencies experienced the low-quality results of relying on price as the determining evaluation factor. However, despite this optimism, most warned that contractors would need to sharpen their pencils and put on their innovation thinking caps to succeed in the ever-increasingly competitive market.



As we enter 2015, innovative companies willing to embrace change are more likely to succeed because they understand the realities of the market and strategize proactively. Looking ahead, what are the innovations – ones that are desirable to customers, possible given constraints such as budget and time, and viable given market developments – that will boost successful outcomes for capture and proposal professionals? Here are five areas to consider.

Price to Win: At times it seems that price reasonableness and realism as well as quality performance have fallen by the wayside as evaluation factors. Many companies have responded with a slash and burn mentality: cutting prices and worrying about execution later, often with poor results. While we must respond to market trends, capture and proposal professionals should also position our companies for future growth. Cutting overhead is not just about lay offs and/or reducing compensation and/or looking to hire the least experienced people. Companies that position for future growth tie their price-to-win strategy to how they run all aspects of their business, including capture and proposals. They develop and continuously evolve pricing strategy using tools such as data mining and Customer Relationship Management (CRM) to truly gain insight into customer budgets and competitor prices.

Takeaway: Make the pricing strategy part of the capture strategy and task the Capture Manager with working it early and continuously making adjustments as the team gains additional information.

Support the Distributed Workforce: The distributed workforce is the present and future of the workplace. A mobile, flexible workforce helps keep capture and proposal costs low and takes advantage of different time zones for increased productivity. With more capture and proposal professionals expecting to work from home, collaborative tools and mobile applications will be more important than ever in 2015. Innovative capture and proposal teams take advantage of free communications and collaboration tools such as Skype, JoinMe, Google Hangouts and the like as well as the many available chat applications. Cloud-based apps like Dropbox and Google Drive allow capture and proposal teams to share and archive files easily without the costs associated with SharePoint or similar tools.

Agility wins if it means your capture and proposal team can rapidly respond to qualified opportunities better than the competition.

Takeaway: Continuously research and test new tools to take advantage of innovative applications that can benefit the distributed capture and proposal team's productivity and results.

Gear Up for Rapid Response: Agility wins if it means your capture and proposal team can rapidly respond to qualified opportunities better than the competition. Especially with the increase in multiple award vehicles, capture and proposal teams need to adopt a task order factory approach to funnel in solicitations, make rapid decisions, solution effectively, write and review efficiently, and funnel out bids with minimal fuss. Critical innovations in this area include implementing a collaborative application that allows you to manage opportunities by pushing data from your CRM; enforce workflows and processes; provide a virtual workspace hosting the materials, templates, and repositories that drive success; and offer management reporting to pinpoint areas that need improvement. Without this type of cost-saving tool, there is no way your company can keep up in today's market, not only because of lack of time, but also due to lack of human resources.

Takeaway: Don't be penny-wise and pound foolish; invest in the rapid response arsenal that you need to win.

Be Healthy: Without your health, nothing else matters. Innovative capture and proposal teams understand the importance of healthy bodies and healthy minds. Getting rid of proposal pizza or at least also providing proposal salad results in slimmer waistlines and less malaise. Recent research by the Mayo Clinic and others has shown that sitting is worse for your health than smoking. The daily trip to the gym (if you even have time for it), while beneficial, cannot undo the damage done from sitting all day. In response, innovative companies are providing standing desks, encouraging fitness, and making sure employees take breaks to move around. Health checks should also include the work environment itself. The highest functioning teams foster a no blame atmosphere, encourage brainstorming, conduct reviews that allow only constructive criticism, and work collaboratively, with everyone rolling up their sleeves to get the job done and focus on the win.

Takeaway: Make health – in body and mind - a priority in 2015 because without it, your team cannot sustain itself in order to succeed.

Actually Learn from Lessons Learned: The best way to prepare for 2015 is to review and act on the lessons learned from 2014 and previous years. Unfortunately, capture and proposal teams usually move quickly from opportunity to opportunity, and capturing lessons learned is seldom a priority. Poor-performing companies just keep running on a treadmill and going nowhere. Successful capture and proposal organizations mine lessons learned and customer debriefs for actionable innovations in managing people, streamlining processes and taking advantage of technology. Yes, lessons learned have been around forever, but it is innovative to actually take them seriously. Don't just give lip service to lessons learned; use them as an opportunity to succeed this year.

Takeaway: Consider changing the title of this final gate review to Lessons Learned and Transformation and see what happens!

As we get ready for 2015, capture and proposal innovations will help your company stand out in a crowded playing field. If you have ideas on innovations I should cover in this column, email me at lpafe@lohfeld-consulting.com. Here's to a winning new year!

Lisa Pafe is a CPP APMP, PMI PMP, speaker, LinkedIn Publisher, and ISO Internal Auditor with more than 24 years of capture and proposal experience for small to large companies serving civilian and defense agencies. She is the Vice President of the APMP NCA and was the Chapter's Speaker Series Chair for two years.

Prior experience includes: VP of Corporate Development at Ace Info Solutions, Inc., President of Vision Consulting, Inc.; VP of Business Development for GovConnect, Inc.; and Director of Marketing for MAXIMUS, Inc. She holds a B.A. from Yale University, MPP from

Harvard University and MIS from The George Washington University.

Strengthen Tomorrow's Workforce TODAY!

APPLY HERE

The APMP-NCA Mentorship Program is designed to engage leading proposal professionals to influence up-and-coming professionals and to provide personal guidance in a dynamic way. Mentorship events can be found on the Event Calendar.

As a mentor/mentee, your commitment is critical to the success of the program and the mutual benefit of your mentorship. Because of this, we ask that participants set aside time at least once per month to meet with your mentor/mentee. We further ask that you document your time (date, duration, main points of discussion, etc.) so APMP-NCA can accurately assess the structure, objectives, and outcomes of the program at the end of the year and also to earn CEUs.

Program Benefits:

- Glean knowledge from experienced professionals in the field
- Exchange "war stories" and share lessons learned
- Invest in the proposal profession and help it grow
- Receive personal training/tips and techniques
- Mentors receive CEUs towards APMP certification
- Hone technological skills and growing trends
- Build relationships with others in the industry
- Get to know your fellow chapter members and learn of opportunities to get involved in APMP-NCA
- Gain different perspectives on alternate approaches.

Criteria:

- Must be an active APMP Member affiliated with the NCA Chapter
- Ability to commit 4-8 hours per month.

Application Process:

The application can be accessed online by clicking here.

Please prepare your application as thoroughly as possible. The more detail provided, the better we will be able to match mentors and mentees for an optimal learning experience. Once your application is submitted and reviewed, we will match mentors with one or more mentees and provide appropriate information about them. Selected participants will attend an APMP-NCA Meet and Greet Luncheon to kick off the program. (Of course, mentors and mentees are welcome to reach out to each other before the luncheon.)

If you have questions, please contact the program administrator, Constance Dyson.

Legal Corner

A Lawyer's Look Back at 2014, and a Look Ahead to 2015

by Shlomo D. Katz, Counsel, Brown Rudnick LLP

The year that is drawing to a close has been a busy one for Government procurement policy makers. President Obama, in particular, has been hard at work, issuing half-a-dozen Executive Orders about who is eligible to win and perform government contracts and what contract costs the Government will reimburse. Do you prohibit employees from discussing their compensation with each other? Not if you want to remain eligible for contracts. Did you spend money either encouraging or (more likely, if you are an employer) discouraging union activities? Not on the government's nickel! Did you inform workers of their labor rights, and, if you are construction contractor, enter into multi-employer collective bargaining agreements? If not, you may be in trouble. For that matter, if you've violated any labor laws in the last five years, you may also be on the Government's blacklist.

The coming year promises to be equally busy. However, none of these new policy matters are immediately relevant to the work of proposal professionals. Even business development folks aren't so concerned with a company's labor record; that's for the HR folks and lawyers to figure out. So, what happened in the law that would interest people who write and design proposals? Not too much is new, but lots is important.

Among other things, proposal professionals can continue to improve their skills by keeping an eye on bid protest decisions. In the year that is ending, the overwhelming majority of protests have continually been denied. But, when agencies blundered, the Government Accountability Office (GAO) did not shy away from telling them so and from calling for a do-over of proposal evaluations or even for new proposals.

Here is a sampling of GAO protests that were decided in 2014, together with takeaways to help you avoid some of the same pitfalls:

In Logistics Network, Inc. (B-408995, January 6, 2014), GAO held that the agency reasonably rejected an offeror's response to brand name or equal solicitation because the offeror provided insufficient information to evaluate the offered products. GAO found that the offeror had said its products were "equal" but that its product information consisted almost entirely of text taken from solicitation and images that appeared on the brand name manufacturer's website. Lessons learned: While brand name or equal solicitations are rare, an offeror's obligation to justify its offer and to provide adequate information is a constant. Also, don't ever misrepresent your offering by using someone else's literature.

In Solers Inc. (B-409079, January 27, 2014), GAO sustained a challenge to the realism analysis of the awardee's proposed price/cost because the record did not demonstrate that the agency's evaluation was reasonable. Likewise, GAO sustained a challenge to the evaluation of the protester's technical approach because the contemporaneous record did not support the agency's explanation for its assessment of proposal merits. Lessons learned: There's little that offerors can do if agencies fail to dot their i's and cross their t's in an evaluation. But, a shabby evaluation is sometimes the result of a carelessly-written proposal. We don't know, but maybe the reason the agency's cost realism analysis was inadequately documented was that the offeror's cost proposal was inadequately documented. Make sure that your proposals contain all of the information that the Government needs to conduct a thorough, defensible evaluation of both your technical and cost volumes.

Another lesson: If you are on the losing end of the procurement and your debriefing suggests that the government did not properly consider the technical merits of your proposal, consider protesting. If the agency seems not to have understood your proposal and it's not because you left information out, the agency may have trouble defending its evaluation to GAO. But, don't protest if you merely disagree with the agency's well-reasoned evaluation or if you didn't bother to answer the RFP's questions.

In McGoldrick Construction Services Corporation (B-409252.2, March 28, 2014), GAO found that an agency used an unstated evaluation criterion when it assessed a significant weakness in the protester's proposal. Apparently the protestor was marked down for not including a quality control feature that wasn't required by the RFP. Lessons learned: Just as you are obligated to comply with the solicitation, so is the Government. If it doesn't, you have rights. But, while the Government should not penalize offerors for not providing what wasn't requested, the Government is often permitted to give offerors extra credit for exceeding the solicitation's requirements. Keep those enhancements coming, but make sure to explain in your proposal what benefits the government will receive, especially if there is a cost or price premium involved.

In Marathon Medical Corporation (B-408052 June 4, 2013), GAO agreed that the agency had held unequal discussions by allowing the awardee, but not the protester, to submit information to demonstrate that its proposal was acceptable. Lessons learned: Offerors like to have an inside track with the evaluators, but it's not always a good thing. In this particular case, the agency probably did not intend to show favoritism; it just made a mistake. That mistake meant that the agency had to re-do at least part of the procurement. In an extreme case, where procurement personnel intentionally give one offeror preferential treatment or inside information, someone could go to jail. It has happened.

Space precludes me from listing many more interesting cases and lessons learned. Here's the main takeaway: When you compose your New Year's resolutions a few short months from now, resolve to read each solicitation, respond to each requirement in a way that gives the agency enough information to justify the highest possible rating, make sure to explain how your cost or price is realistic and reasonable if that is requested by the solicitation, and comply with all applicable laws.

That way we won't read about you when we look back at 2015.

Shlomo D. Katz is Counsel in the Washington, DC office of the international law firm of Brown Rudnick LLP, a Corporate Sponsor of APMP-NCA. Shlomo specializes in all aspects of Government contracting and is a regular presenter at chapter events. If you have any questions about the topic of this article or other proposal or contracting issues, please contact Shlomo at 202.536-1753 or skatz@brownrudnick.com.

An Agile Retrospective

by Maryann Lesnick, CP APMP, PMP, MOS, ACT-IAC Fellow

Looking back at the past and into the future makes me think of the Proposal Post-Mortem. Performing a critical Lessons Learned review of what worked well and what can be improved is an important best practice in the lifecycle of a proposal. Do we always have at least one? How much attention do we give it before rushing off to the next proposal?

Agile approaches like Scrum and Kanban employ a similar best practice called the Agile Retrospective. Its purpose is the same as a Proposal Post-Mortem – to capture Lessons Learned and improve processes and outcomes on future sprints (or proposal efforts). What can we learn from our counterparts in the software engineering field? What new perspectives can we adopt from the agile principles? After all, we are all developing a product – theirs is software, and ours is the proposal.

Let's explore this a bit…

Retrospective (from Latin retrospectare, "look back") refers to looking back at past events. In the context of both proposal and IT projects, it is a meeting held by a team at the end of a project/process/iteration/cycle/sprint to discuss what was successful, what can be improved, and how to incorporate the successes and improvements in future projects. This discussion also gives the team members a chance to inspect and adapt their behavior and reaction to the current state of the process and helps them devise ways to improve coordination and collaboration.

Retrospectives are widely considered one of the most important and indispensable Agile techniques. Inspection and adaptation are all about continuous improvement, and without continuous improvement, there is no true sense to the term "agility."

Agile retrospective: The five-phase structure

Agile Retrospectives are not just a quick round-robin over coffee and donuts. A good retrospective has structure and requires preparation. In the book Agile Retrospectives: Making Good Teams Great, Esther Derby and Diana Larsen identify 5 steps the facilitator should follow when conducting a retrospective:

1. **Set the stage.** Lay the groundwork for the session by reviewing the goals and agenda. Create an environment for participation by checking in and establishing working agreements.
2. **Gather data.** Review objective and subjective information to create a shared picture. Capture each person's perspective. Seeing the iteration from many points of view provides greater insight.
3. **Generate insights.** Step back and look at the picture the team has created. Use activities that help people think together to delve beneath the surface.
4. **Decide what to do.** Prioritize the team's insights and choose a few improvements or experiments that will make a difference on future efforts.

5. **Close the retrospective.** Summarize how the team will follow up on plans and commitments. Thank team members for their hard work. Conduct a retrospective on the retrospective.

The Scrum Master (Proposal Manager) usually facilitates the retrospective, and part of his/her job is to make sure that all participants know they can speak their mind. "Working agreements" include recognizing that all viewpoints have merit.

Data gathering involves examining:

1. **What worked well?** List the processes, interactions, and events that the team found helpful and would like to continue.
2. **What didn't work well?** List the delays, impediments, and broken processes that the team would like to either improve or discontinue.
3. **What actions can we take to improve our process going forward?** List the improvements and actions that can be carried forward into future sprints based on the lessons learned in the retrospective.

One technique Agile teams use to collect ideas at a Retrospective is to use post-its or a white board to capture all ideas on the wall.

The team puts forth ideas/suggestions for improvement and collectively decides which to carry forward for future projects.

There are other techniques, games, and simulations that Agile teams use to promote a creative and comfortable platform for team members to express themselves freely. These games make the retrospective meeting more productive, interactive, and fun.

As a rule of thumb, a retrospective for a 30-day sprint lasts about four hours. How much time do we as proposal managers take for a retrospective? Another Agile rule of thumb is to make sure at least one actionable item comes out of each Retrospective session.

Do we always have a retrospective, or post-mortem at the end of a proposal effort? Perhaps we are not putting enough focus on this activity?

Conclusions

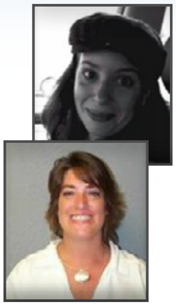
In summary, consider approaching the Proposal Post-Mortem with renewed focus in 2015:

- Always have one
- Make it a priority
- Make sure at least one actionable component comes out of each meeting

Agile practices place a high degree of importance on the retrospective. Retrospectives are planned, executed and revisited with a follow-up at the same level as Agile code inspections (or our Color Team Reviews). Perhaps we should treat the proposal post-mortem like another Color Team?

For 2015, let's treat the proposal post-mortem like another color review, giving it the planning, execution and follow-up it deserves!

President, Maryann Lesnick, CP APMP, PMP, CSM, MOS – A Principal Consultant at Lohfeld Consulting, Maryann is the current President of the NCA chapter. She served as the Vice President of the NCA chapter in 2012-2013, as the 2011 Logistics Chair, on the Boot Camp Committee in 2008-2009, and as Boot Camp Chair in 2010. Maryann is a Practitioner Level APMP certification mentor, an ACT-IAC Fellow, a Certified Scrum Master, a CMMI Level 2 Internal Assessor, ISO 9000 Internal Auditor, certified Microsoft Office Specialist (MOS), and holds a BS in Mathematics and MS in Information Technology Management.



The Biggest Proposal Trend this Year and Next Year and the Year After Next Year? Tough TO Competition

by Julia LaSalle-DeSantis and Michele Stosick

Proposal shops for the last few years have been striving to optimize Task Order (TO) Proposal processes, and 2014 turned up the heat. With a usual two week turn around for TO responses, project and technical leads already (hopefully!) deeply engaged in project execution of earlier TOs, and often-times mandatory program bidding requirements—Proposal Professionals have been hustling. In 2015 and going forward, there's no more debating, the trend will continue.

Indefinite Delivery/Indefinite Quantity (IDIQs) programs are the procurement way of the future. The Government needs the process efficiencies of multiple award contracts (MACs) programs which ultimately translate into greater tax-dollar stewardship. For this reason, many across the Federal landscape are committed to establishing these pre-qualified 'short-lists' of vendors for as many services as possible. These IDIQ programs have values on a hyperbolic scale—sometimes billions and billions of dollars—such that failing to be on a winning team could be catastrophic for many companies.

As an example, just in September 2014, GSA's One Acquisition Solution for Integrated Services (OASIS) was issued a Notice to Proceed (NTP), essentially putting an 'Open for Business' sign in the window and closing the window for bid protests. OASIS is an acquisition vehicle, awarded to more than 70 companies from across multiple disciplines such as management consulting, logistics and finance. The IDIQs don't set specific contract details, but allow them to compete for business for up to five years. (https://interact.gsa.gov/blog/frequently-asked-questions). To give you an idea of scale, the Air Force agreed to use OASIS for its complex professional services projects back in December, committing to spending $500 million over 18 months. (Note: The NTP for OASIS Small Business (SB) GSA's 100-percent small business set-aside contract, was issued earlier this summer.)

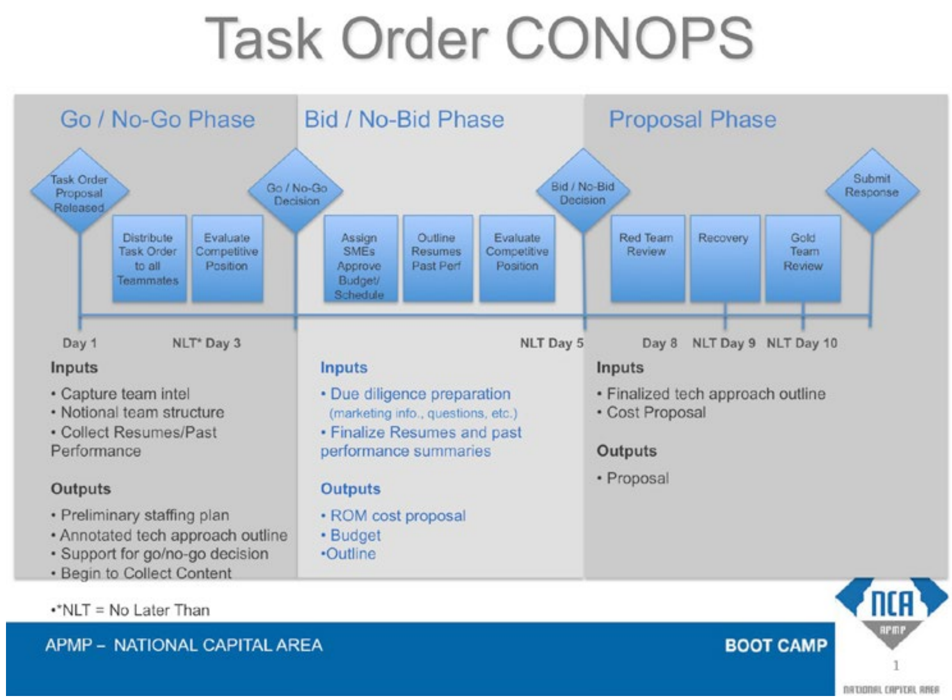


Figure 1. Ms. Stosick presented this slide at the 2012 APMP Conference in April 2012.

And going forward, as another illustration of the IDIQ trend, the Defense Health Agency (nearing its one-year anniversary) has publicly committed to finding the savings they promised through the reorganization of DoD's healthcare activities—in part from a more rigorous approach to strategic sourcing. Including (you guessed it!) IDIQ programs. In fact, DHA is conducting market research right now for a new 10-year, $20 billion IDIQ contract that it plans to finalize by March 2016.

For Proposal Shops at successful companies, that means finding a way to win the IDIQ award. Get on the short-list, for Pete's sake. But that's only the first step. Examples of awarded contracts that cannot reach (or in many cases, cannot even come close to) their ceilings abound. And here lies an interesting challenge.

Although some of the big problems, like teaming, and a TO staffing process, should have been addressed with the original proposal, winning Task Orders can be rough. In some ways, it's obvious, the number of competitors is smaller, but their qualifications have already been established. With an average two week turn to make a response, successful proposal shops are supporting their program managers with a few tools that are emerging as best practices.

- **Decision-making processes—** Because of the short turn, once an RFP is used, successful organizations must have refined processes for evaluating the opportunity and getting a leadership bid or no bid decision. Facilitating this process is something a "Task Order Factory" can help with.
- **Response templates—** TO templates adjusted based on typical TO solicitation requirements including resume templates and a database of formatted resumes for popular program personnel.
- **Past Performance database—** Strong past performance references, with CPARS ratings, tailored to the overall program requirements, with up to date contract information.
- **Staffing Spreadsheets—** Those formatted resumes for popular program personnel should also appear in a log for the Cost Team mapping them against the program labor category descriptions and the company's.
- **Compliance Matrices—** Of course every proposal has a compliance matrix, but in this deadline-driven environment it's even more critical; there may be response requirements both at the program level (outlined in the award contract) and at the TO level.
- **Statement of Work (SOW) shredding—** Each draft is prepared with the specific SOW incorporated. Tech leads must be freed of the burden of thinking through an outline.
- **Technical writing/editing—** The TO Factory coordinates with the technical writers/editors to ensure responses are not only compliant but compelling winning. Working with the same tech writers and editors on multiple program TOs will allow that person to create a hint of a story about your team – across responses.

Michele Stosick is a Task Order Proposal Manager for CTC. She leads and manages the CTC team in planning, preparation, and production of task order proposals. With 19 years of proposal experience, Ms. Stosick ensures that all required resources are available as needed and that the winning task order response is compliant and delivered on time. Her core competencies include proposal management, database management, marketing research, proposal editing and formatting, document design, and proposal compliance and production. Ms. Stosick can be contacted at michele.stosick@gmail.com.

Julia LaSalle-DeSantis is a Technical Writer with 10 years of proposal experience at both the Program and the TO level. She is a Technical Writer for a large Federal contractor. She is highly organized and deadline-driven and works well with people from various and competing functional areas throughout the company. She has a bachelors in Technical Writing from Carnegie Mellon University and Masters from Duquesne University in Pittsburgh Pennsylvania. She can be contacted at julialct@hotmail.com.

Fun Fact...

Americans spent $1.9 billion in 2013, according to The Nielsen Company. That's around 600 million pounds worth of Hershey bars, lollipops, Milk Duds, Twizzlers and Clark Bars.

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Note From the E-Zine Chair and Chief Editor, Jessica Douglass

Please take a few minutes and let us know:

- What keeps you up at night as a proposal professional?
- What article and tips would you like to see in this executive summary?

Our executive summary team would be happy to get your feedback.
We can be reached at ezine@apmpnca.org.

APMP-NCA Board of Directors Meetings are Open to Members

The Board of Directors for APMP-NCA meets the first Tuesday of every month. Two out of every three meetings are virtual meetings. If you would like to join a meeting, contact us by going to http://www.apmpnca.org/contact/.

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