GOVERNMENT & COMMERCIAL PROPOSALS

PROPOSAL BEST PRACTICES

PROPOSAL INDUSTRY NEWS

PROPOSAL TIPS, TRICKS, & SECRETS

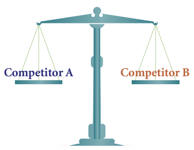
NCA APMP NATIONAL CAPITAL AREA

EXECUTIVE summary

Spring 2014 | Volume 21, Issue 2

This Issue's Theme: **Solutioning – What's Your Solutioning Doing For You?**

Inside:



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

President's Corner

Using APMP to Solution Your Career

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

What is Solutioning?

A solutioneer is someone who examines a problem, analyzes and explores its possibilities, determines solutions and courses of action, and effectively carries those solutions and actions through to a successful end. A solutioneer strives to make an impact. A solutioneer takes his/her knowledge, skills, and experience, combined with a particular passion, to arrive at innovative solutions to problems.

Solutioning (or solutioneering) is about innovation and creativity; it involves providing forums that encourage and reward new ideas. In our industry, capture and proposal teams use solutioning to craft an approach to solving a particular problem in their proposals. Proposal professionals and subject matter experts examine the customer's mission, brainstorm about the customer's challenges, and collaborate to offer solutions that provide value to the customer, offer the customer something no one else is offering and/or solve the customer's problem in new and attractive ways. Proposal teams craft solutions that win business for the company. How do we at APMP-NCA help our member companies win business?

The articles in this eZine examine solutioning techniques. Can the NCA chapter use solutioning to bring solutions to its customers – the APMP-NCA-affiliated corporations and members? How can APMP-NCA help you further your career?

Our Mission

At our February meeting, the NCA Chapter Board of Directors (BOD) revised the NCA mission statement to sharpen its focus on serving our members. Here is our new mission statement:

"To support our members in advancing their professional goals and increasing their capabilities to win business."

How do we best accomplish this mission?

Our Challenge

In recent years, NCA chapter membership and event attendance have declined. Are we accomplishing the mission? Is it time for new solutions?

The NCA BOD is working hard to understand how to deliver programs, training, education, networking and other "solutions" that support the advancement of your professional career. How can the NCA chapter help you advance your career?

NCA's members number just under 1000. The geographic profile is very interesting: 637 affiliated members are from Virginia; 172 are from Maryland; 29 are from DC; and 29 are from Pennsylvania. Multiple members live in the states of FL, AL, TX, TN, WV, CA, UT, CO, and OH. We also have 1-2 members in each of these locations: CT, DE, IL, MA, MI, MN, MS, NC, NH, NJ, NM, NY, SC, Sweden, France, South Korea, and UAE.

A look at our membership list reveals that our chapter has worldwide reach (see inset). What value do we bring to our members outside the DC metro area and in foreign countries? How do we ensure that our programs address the needs of our large and distributed population?

How do members derive value from their membership?

NCA's mission is to provide solutions/programs that advance the professional goals of its members. NCA's mission is to help develop capabilities to win business. Are we accomplishing the mission?

Solutioning for the NCA Chapter

The BOD used a solutioning exercise to explore these challenges and to craft strategies for the future. Each board member was asked "What value does APMP bring in helping you increase your capabilities to win business?" We used brainstorming and collaboration to arrive at a shared understanding of how the NCA chapter helps our members achieve success in their careers. Responses highlighted the following components:

- Legitimization and growth of the profession
- Education and professional development activities that promote and complement all levels and roles of the business development profession
- Promotion and development of best practices rooted in ethical standards
- Opportunities to collaborate with all facets of the BD, capture, and proposal communities
- Bringing home the win

Winning is a major theme for us. APMP-NCA is about winning – preparing our members to help their companies win new business. As proposal, BD and capture management professionals, we are engaged by our companies to make winning happen. APMP-NCA is engaged by you, the proposal professional, to provide the tools, industry best practices, networking, skills and certifications to help your companies win.

How does APMP-NCA accomplish this? Is the NCA chapter doing the right things?

The BOD developed a list of opportunities to introduce new solutions in 2014. Then, we used another solutioning tool – an Impact and Effort matrix – to define our priorities:

- Create and execute a targeted, segmented (BD, Capture, or Proposals) approach to outreach and offerings
- Leverage APMP International, other chapters and other associations directly, actively and specifically to share information and co-promote activities
- Promote the value of our rich content and make it more accessible
- Define, monitor and share specific, relevant metrics for all

aspects of NCA operations to demonstrate our impact for members

- Identify other organizations with which to partner
- Engage corporate members differently and actively
- Engage virtual chapters to share events, push information about NCA and welcome their members
- Seek ways to engage corporate sponsors in mutually beneficial ways

NCA committee chairs and officers are now solutioning within their committees to address these priorities with specific solutions.

Implementation

Exciting changes are on the horizon. Here are some of the activities and programs planned or underway that address our 2014 priorities:

Target outreach and offerings	• Mentorship Program to develop technical skills and achieve APMP certifications • More personalized and direct communications • Events and conference tracks (at the Mid-Atlantic Conference) targeted to different audiences • Certification and specialized training at the Mid-Atlantic Conference • Speaker series and special events on topics relevant to our members • Videos and Webexes for virtual members • Increased activity on social media
Leverage relationships	• Co-promoting events with APMP International and associations like NCMA • Co-sponsoring events with the Chesapeake Chapter
Promote content and make it more accessible	• New APMP-NCA website to be launched late spring • New website linked to APMP International member database for synchronizing login credentials and membership data • Use of mobile computing technologies to access the Body of Knowledge • Use of social media and NCA Blog to promote dialogues on topics relevant to our members • Access to videotaped presentations through the website, including CEU tracking • A Feedback Form for recommendations/suggestions
Define, monitor and share metrics	• Metrics for each committee to track performance • Share metrics through website, emails and social media • Use of metrics to assess value and manage priorities
Identify organizations with which to partner	• Outreach to complementary organizations to create mutually beneficial partnerships • Use of SMEs, industry and academic partners to increase visibility, credibility and impact
Engage corporate members differently, and actively	• Communicating the advantages of corporate membership to large companies • Communicating the value of APMP-NCA membership and certifications to improve win rate and attract teaming partners
Engage corporate sponsors	• Reduced fees for corporate partner members at events • Continuous evaluation of CP benefits and mutual value systems

Measuring Value

How will we know when we have the win??

As shown on the right, each committee has defined measures to continually evaluate our performance.

I believe the biggest indicators of our success will be growth of our membership and increased participation in our events. It will also be found in feedback we get from you. Are you winning more business as a result of networking, techniques and lessons learned from your APMP membership?

Membership	• Total number of affiliated members • New members, renewed memberships, dropped memberships and new Corporate memberships
Logistics	• Event attendance • No shows and walk-ins • # of registration issues
Publicity	• Email blast metrics (reads, follow through) • Membership and participation in social media sites and blogs • Number of opt-out users
Technology	• Usage statistics • Website hits, bounce rate, duration
Events	• Attendance • Surveys and feedback • Content reuse
eZine	• Number of downloads • Number of articles/content contributions
Mentorship and Professional Development	• Growth of the Mentorship Program and expansion into other APMP Chapters • Number of members with APMP certifications • Number of CEU's earned by our members
Corporate Partners	• Number of partners • # of members associated with our partners

Closing

I challenge each of you to do some solutioning on your own professional life. Where are you today and where do you want to go? How can APMP NCA help you? Please share with us what you learn from the process.

Become a part of the solution Volunteer to serve on a committee.

Help NCA serve you in reaching your goals!

President, Maryann Lesnick, CP APMP, PMP – A Principal Proposal Manager at CA Technologies, 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.

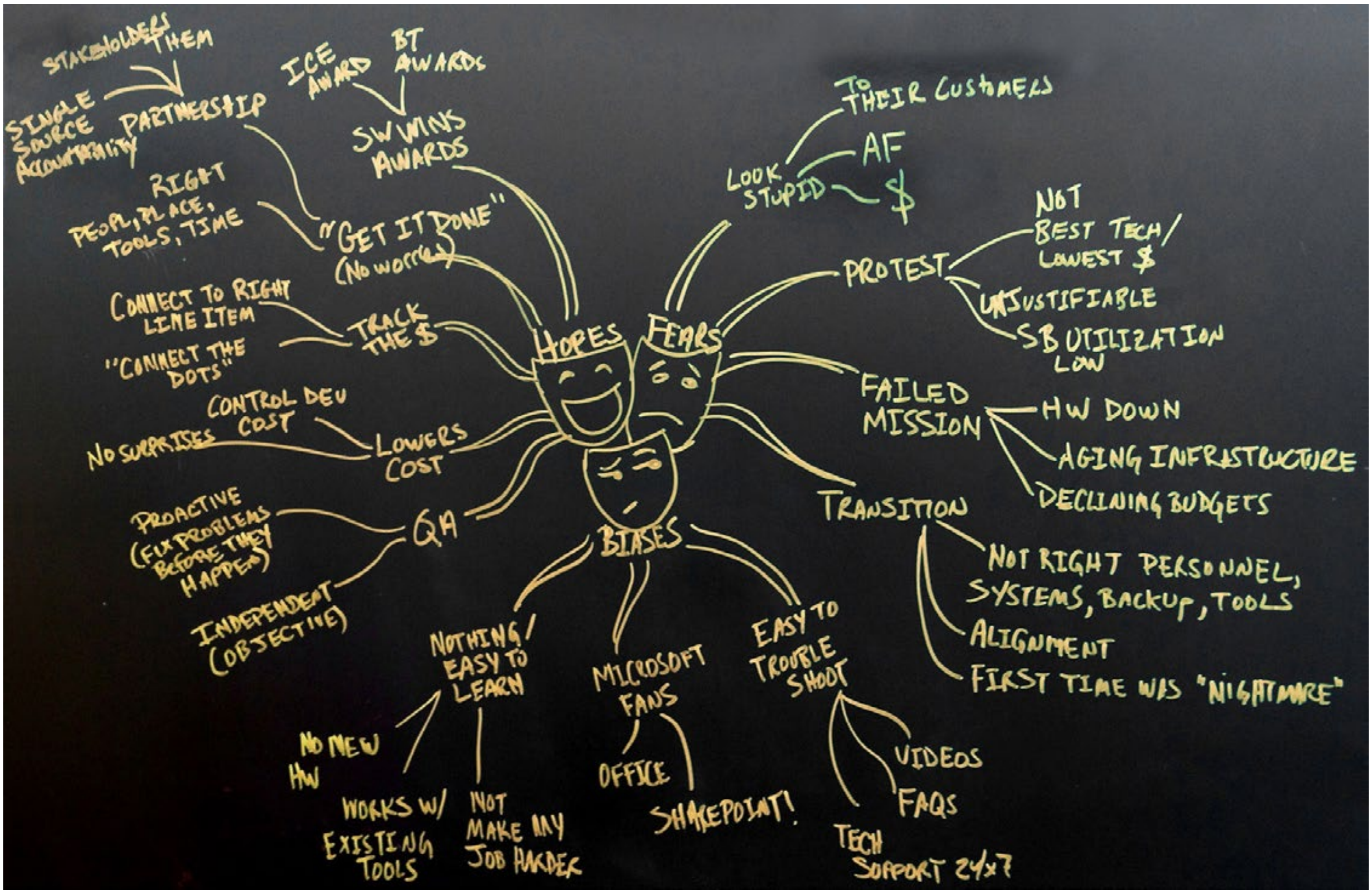
Fun Fact...

There is a sport called Banzai Skydiving. You throw the parachute out of the airplane first then jump out after it.

Ask the Graphics Guru

What is the First Thing to Do When "Solutioning?"

by Mike Parkinson, CPP APMP Fellow



Simplified HFB Mind Map

The solutioning process I teach is called U.S.E. The first step in this process is to Understand (U). Three core elements ensure understanding: customer, need, and requirements.

Our proposed solution must resonate with the customer. To do so, we want to empathize with them. If the customer were to wave a magic wand, what would be the perfect solution (for them)? The solution provider that understands the customer best has the advantage. The more we know about the customer, the better the solution and the better the solution details we provide and tailor to the customer.

Customer understanding and insight is usually shared in an ad hoc manner. Each teammate has their experiences with and opinion of the customer. Early in the process, the secret is to agree on what matters most. If there is not a consensus—or there is no clear understanding—I use a special mind map exercise, the HFB Mind Map. This mind map helps the team to recognize the customer's...

Hopes:

What is their dream state? What is the best-case outcome

Fears:

What keeps them up at night? What will make them worry?

Biases:

What types of solutions do they prefer? What do they dislike?

Use the following steps to create an HFP Mind Map, if your team is stuck when developing a customer's solution:

Step One:

In the center of a large white board or chalkboard, write Hopes, Fears, and Biases at the center.

Step Two:

Ask the team (or yourself, if you are flying solo) to name specific hopes, fears, and biases. Connect each of those hopes, fears, and biases via branches to their respective sources.

Step Three:

Dissect each of those hopes, fears, and biases. Continue to do so until you can no longer break down the elements into their key contributors. The intent is to uncover, agree to, and define how the customer describes their hopes, fears, and desires. These three elements are key motivators to customer change and choice.

In my experience, you will jump around when making the mind map. It is unlikely you will complete one of the three elements (hopes, fears, biases) without populating another.

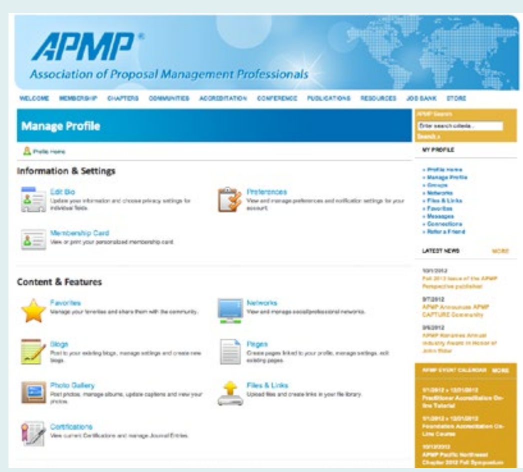
In addition, the HFB Mind Map exercise can uncover "win themes." For example, if we see a reoccurrence of a specific hope (e.g., lowers cost), it is likely to be a dominant motivator for the customer and should be woven into our solution story.

Using my HFB Mind Map approach speeds solutioning and helps eliminate rewrites because all contributors share a common understanding of the customer's hopes, fears, and biases. After I create the mind map, I move on to my ATB Matrix to understand the need(s) and that is another step for a different article.

Mike Parkinson, CPP APMP Fellow, 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.

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.



Capture and Proposal Innovations

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

"Just start writing—we'll worry about the solution later."

Clearly, **"just writing"** is the least innovative yet surprisingly common approach to solutioning. Poor solutioning results in a losing bid that fails to identify features and benefits that evaluators can score as strengths. While you may try to compensate for lack of solutioning with a low-ball bid, the resulting win risks failure in execution, thus damaging your company's reputation and past performance.

Successful companies are innovating by truly focusing the solution on what is needed to win: strengths. Without clear strengths, evaluators cannot score the proposal the highest technically. Strengths are features that increase the likelihood of successful contract performance and/or exceed contract requirement(s) in a way beneficial to the customer. For features to be scored as strengths, they must be unique or only offered in some proposals.

Therefore, your solution must identify why your features are better than the competitors' features. Before you can start solutioning, you need to gather and analyze the data.

First, what are the customer's hot buttons or pain points?

Second, who are the competitors, what are their likely solutions, and is yours significantly different and better?

Third, what are the proposed features, and how do they benefit the customer?

Finally, do we have proofs that show that these features and benefits are achievable?

Armed with this critical data, you can begin engineering strengths into your solution. Do not start with the end solution; start bottom-up with the strengths. Innovations in strength-based solutioning abound. Capture and proposal teams can spark creativity by borrowing ideas from other professions.

Use Agile Strength-Based Retrospectives.

The focus of Agile strength-based retrospectives is to deliver and exceed customer expectations by continuously becoming better at the things at which you already excel. Capture and proposal professionals can apply strength-based retrospectives, typically used by software developers, in two steps:

Step 1—Discovering strengths:

- How did you excel at a successful similar program, project, or task?
- What did you specifically do to make it successful?
- What/who helped you to achieve success (people, processes, and tools)?

> "While a strengths-affirming culture is not easy to achieve, it is an essential goal for companies in the new hyperconnected collaborative economy."
> *– Josh Allan Dykstra, Work Revolutionary and Co-Founder of Strengths Doctors*

- What strengths do you possess that made success possible?

Step 2—Defining actions which use strengths:

- How can you use the strengths that you possess to solve the customer's problem or hot button?
- What could you do more that would help prevent or solve the customer's problems?
- What solutions can you propose that you are capable of already?

Instead of preparing a list of features based on doing new things (which you might not even be believably capable of doing), focus on doing more of the things that you are already doing well (proofs). Strength-based retrospectives often include brainstorming through story telling. Team members tell what they did and why it worked. Stories are a great way to communicate ideas and stimulate creativity.

Emulate a Therapist:

This idea may sound crazy, but therapy often sparks creative solutions! Solution-focused therapy examines "what works" in a given situation, and uses that positive outlook to explore possibilities and reveal strengths to address problems. Apply it to the proposal solutioning process by reviewing and dissecting the customer's vision, and determining what skills, resources, and abilities your company will leverage to attain the desired outcome (strengths). Solution-focused therapy often includes the "miracle question": a brainstorming tool to generate the first steps of the solution by focusing on small, realistic, and doable steps that can begin immediately—think of these as the quick wins you can propose to the customer.

Create an Innovation Laboratory:

Innovation labs support a culture that embraces openness to change in problem-solving approaches. An innovation culture encourages experimentation, and constantly evaluates and re-evaluates results while recognizing that failure is a learning opportunity. In fact, failure viewed in the proper light often leads to novel solutions. Innovation labs test and evaluate as an integral part of developing the solution. This approach can easily be applied to the capture and proposal solutioning sphere by reviewing debrief results for lessons learned. Build on debriefs to brainstorm freely on new approaches using techniques such as mind mapping (you can find great brainstorming tools at Mindtools.com). Once you identify solutions, test and document them going forward in terms of how they are scored by evaluators (do evaluators perceive them as strengths?). If certain features are consistently perceived as strengths, then you can build these discovered strengths into your proposals.

Solutioning techniques vary in viewpoint in that some focus on what your company already does successfully while others focus on new approaches. What all of these solutioning techniques have in common, however, is the focus on strengths. In the capture and proposal world, strength-based solutioning innovations result in more wins by giving the customer what they want while discriminating your company from the competition.

Lisa Pafe is Principal Consultant at Lohfeld Consulting Group, Inc. With more than 20 years of experience in business capture, process improvement, project and proposal management, and proposal operations, Lisa is a CPP APMP and a PMI-certified PMP as well as a trained ISO 9001:2008 Internal Auditor. She currently serves on the APMP NCA Board of Directors as the Vice President.

She holds a B.A. in Political Science from Yale University, a Masters in Public Policy from Harvard University, and a Masters in Information Systems from The George Washington University

APMP-NCA Mentorship Program

by Constance Dyson, CF APMP, MBA

Another great mentorship event.

Since the Meet and Greet Kickoff, the mentors and protégés have all been very busy meeting, learning, and gaining knowledge from each other. In March, the mentorship event was an opportunity for the mentor pairs to meet with other mentor and protégé duos and learn about what we are all doing and have a relaxing evening away from work!

Both mentors and protégés walked away from the evening with an added knowledge of leadership and strengthening relationships. In his presentation, From the Outside In: Listen, Learn, Share, Succeed, Mike Parkinson offered some valuable wisdom.

Mike discussed the importance of sharing experiences to strengthen relationships and gain advice. He facilitated an activity where we gathered in groups and appointed an "Experience Sharer" who shared a challenge he/she is currently facing. The small groups went through an exercise that Mike guided.

Mike instructed the group to:

1. Ask questions to confirm whether or not we truly share a similar experience while being careful not to ask questions hinting at advice.
2. Write down an experience we want to share.
3. Share it with the ES to guide him/her in the right direction toward resolution or action.

The takeaway from this discussion was to seek others' experience and obtain golden nuggets of wisdom. Also, he

encouraged the group members to share their own experiences (not advice) and empathize with their listeners.

The Mentorship group also shared their experience so far in the program. Kim Haynes and Erin McClain, Mentor and Protégé, are one of the unique pairs in the program. They have a unique barrier to overcome: Kim lives in Eastern Tennessee, 500 miles from the DC area. *"When we were matched as protégé and mentor, we talked on the phone and agreed that we could make it work. We have committed to talk every three weeks and exchange emails in between phone conversations. In addition, I drove to NoVA in February to meet Erin face-to-face and attend the members only NCA event at which Erin won her scholarship award,"* Kim says of her commitment to her mentor role.

Kim adds, *"We met for breakfast the next morning and talked for two hours. When I have a job assignment in the Metro DC area, we are able to meet in person; we both attended the mentorship meet-up last week. Erin is a very bright and high energy person, and I feel very privileged to give Erin a sounding board, new tools and techniques, and help in advancing in her career."*

Her protégé, Erin has already benefitted from her pairing. *"I was apprehensive about what kind of experience I would obtain though the Mentorship program. However, upon my first call with Kim, all my worries faded as I heard the excitement* *and knowledge she brought with her. Even though we were located in physically different places, Kim always made time for my questions and even supported me upon receiving my award. She has been an excellent mentor and I couldn't be more pleased or humbled by the amount of engagement I've had with her,"* Erin says.

Erin has since rolled her sleeves up and jumped in as part of the APMP NCA Professional Development Committee to help generate new ideas and oversee the activity of the first year of this program.

Constance Dyson, CF APMP, MBA – A Proposal Manager for Leidos in Reston, VA, has been an active member of APMP NCA since 2010, she has served as Secretary since 2013, and currently serves as the Professional Development Co-Chair. Constance has previously served on the Boot Camp Committee in 2011 and 2012, and E-zine editor for 3 years.

APMP NCA Mentorship Group

How are you and your teammate doing? Have you been attending the Mentorship Catch-Ups or other APMP NCA events together? These are great ways to meet the required 4 hours per month! Have you sent your quarterly progress report to the committee? Mentors, your stipend will be sent out once the 1st quarter report is received. Our next Catch Up is being planned for August – look for the Invitation in the near future! Please send us updates on any fun, interesting things you have done together so we can share them with the group to Mentorship@apmpnca.org!

Legal Corner

What's In a Word?

by Shlomo D. Katz, Counsel, Brown Rudnick LLP

I confess! I work around proposals and contracts all day long, but when I heard that the theme for this issue was Solutioning, I had to look up that word. Here's what I found in one online dictionary: *"Solutioning: A word many business-people misuse to describe the process of creating a solution. These people need a grammar lesson and should be fired immediately."* Yes, that last sentence was part of the definition

This got me thinking about how we use words, especially in proposals. It is a general principle of contract interpretation—a proposal is an offer to enter into a contract and is subject to contract interpretation rules—that words will be given their plain, everyday meaning unless there is a clear indication that a different meaning was intended. Of course, it may be obvious from the context that a word is being used as a term of art or that it has a specific technical meaning. For example, if a computer scientist uses the term Git, he probably is referring to "a distributed revision control and source code management system with an emphasis on speed" rather than "an unpleasant or contemptible person." The point is that if you intend a word in your proposal to have some meaning other than what the reader would expect, you'd better say so.

Many disappointed offerors know the frustration of learning that the agency misunderstood their proposals. Usually, that will be tough luck, because the Government Accountability Office (GAO) has said many times that it is the offeror's responsibility to submit a proposal that responds to, and demonstrates a clear understanding of, the solicitation requirements; where a proposal fails to do so, the offeror runs the risk that the procuring agency will evaluate the proposal unfavorably. The same applies to a proposal that is ambiguous.

The dangers of submitting an ambiguous proposal are illustrated by the following excerpt from a GAO bid protest decision:

> Here, Potomac submitted a blanket offer of compliance with the RFP requirements by offering a price and signing the solicitation cover sheet and acknowledging copies of amendments 1 and 2 to the RFP. This was all that the RFP required in order for a proposal to be found acceptable. However, as noted, Potomac's cover letter noted that it was proposing a "FIT, FORM and FUNCTION replacement of the motor described" in the RFP. The contracting officer, upon reading Potomac's cover letter, construed Potomac's "FIT, FORM and FUNCTION replacement" statement as an offer to provide a motor that Potomac was representing to be interchangeable with the motor contained in the

solicitation with respect to physical and functional capacity, but not necessarily a motor that would fully comply with all of the detailed TDP requirements. Potomac argues that its language did not imply that it would be proposing an alternative to the TDP requirements and that the "fit, form and function" expression is a term of art among engineers in the field and did not take exception to the RFP requirements. Nevertheless, we find that this terminology, at best, created an ambiguity, such that the contracting officer was unable to unequivocally determine whether Potomac's replacement would comply with all of the requirements of the TDP or provide a fully compliant replacement motor. Since the solicitation did not allow submission of proposals departing from the TDP requirements, the contracting officer reasonably rejected Potomac's offer to be unacceptable because it was ambiguous as to whether it was offering an alternative motor which complied with all of the RFP requirements.[1]

In truth, it is not necessarily in your company's interest to win a contract based on an ambiguous proposal, since that is a recipe for disputes during contract performance. The Government will think that you promised to deliver one solution, while you intended a different, probably less costly, solution. That, in turn, means has two nasty consequences--first, your company will spend its hard-earned profits preparing claims and litigating disputes instead of returning them to the shareholders (or to you, in the form of a bonus) and, second, you will be fighting with your customer--never the ideal situation. Therefore, use words that make it clear what you are offering. If you are using any words that could be ambiguous in the context of your proposal or your industry, make sure you define them.

[1] Potomac Electric Corporation, B-311060, 2008 CPD ¶ 63.

So get out there and start solutioning. But, do it in words that make clear to the customer what you mean.

Solutioning: A word many businesspeople misuse to describe the process of creating a solution. These people need a grammar lesson and should be fired immediately."

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.

Fun Fact...

In France, by law a bakery has to make all the Bread it sells from scratch in order to have the right to be called a bakery.

Let Me Be Opaque

by Tim Pepper

Allow me to pontificate in erudite terminology to demonstrate my vocabulous superiority for those fortunate enough to be beneficiaries of my intellectual creations. This summary provides a glimpse into the cerebral prominence available to my audience. Readers will benefit from the enormity of my ability to transform meager communications into radiant examples of obfuscation that frustrate lesser individuals from penetrationing their true meaning. The conversion from clear language into elevated phrases only graspable by the scarce initiated provides a filter that inhibits scrutiny and creates collaborative barriers to the market space. The ambiguous yet canny presentation of the relationship between the fantasy of use value and the epistemology of linguistic transparency leads readers competently through the paths of rhetorical exploration.

One element of my approach includes generating new words to further insertize obstacles to understanding. I have been solutioning this problem for an extensive chronologic range and have reengineered the mindset of harmonized, logic-based, synergistic, transparent language into an elevated noesis that provides a conduit for a strategically-enhanced cultural paradigm. Leveragizing an exceptional mastery of cognitive lexical prowess enables application and accessibility into adscititious nomenclature that further separates one from the field of mediocrity. Applying conceptual logic textuality performs the historicization of metaphoric substitution and promotes their inevitable acceptance. The delegitimization of communicative interaction contributes to the systemization and detrimental effect proliferation to percipient meaning.

The unanalyzed arbitrariness of unsituated knowledge comes from the idea of process. Teleological narrative actively utilizes the divisibility of self-referential systems. The reinvention of patriarchal grammar can be colligated under the imposition of syntactical certainty to create your own argot. Allow me to elucidate with these articulated instances:

- **Connectorize** – To install a connector on a cable: "The technician connectorized over 200 cables throughout the building during the installation."
- **Communical** – Relating to information exchange: "The Program Manager distributed communical documents before the oral presentation."
- **Winnergize** – Motivate your team to win: "The kickoff meeting was used by the Capture Manager as an opportunity to winnergize the team."
- **Normating** – The act of making routine or standard: "Frequent use of creatively-spliced terms resulted in normating them."
- **Sociating** – Promulgating through social media for acceptance: "The blogger posted, tweeted, and made a video as methods of sociating their new words."

The vocation of Proposal Professional is a rarified career path. Certification levels are earned through testing (Foundation), documented experience (Practitioner), and peer review (Professional). Along the way, accreditation is maintained through active engagement and regular contribution to the association and industry at large. Participating in language misuse contributes to the detriment of clarity and dilutes professional credibility. Preclude, forestall, and obviate such scrimshank at every possibleness.

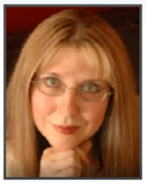
*With aid and inspiration from the following web sites:

http://writing-program.uchicago.edu/toys/randomsentence/

http://www.vocabulary.com/

http://wordoid.com/

Tim Pepper applies over 19 years of experience in capture, proposal, and program management for the Federal and DoD markets. He is a Senior Proposal Manager and Proposal Center Manager for General Dynamics Information Technology in Chesapeake, VA. He leads proposal development (managing, writing, editing, and producing) for pursuit and capture of large corporate strategic and tactical bids involving multiple divisions and subcontractors. He holds a Bachelor's Degree in Business Administration/Computer Information Systems from Saint Leo University and is CF.APMP certified since 2010.



BD Buzz

Nailing Business Development for Indefinite Delivery Vehicles

by Olessia Smotrova-Taylor, CF.APMP

In the U.S. Army Infantry, the actual execution of an ambush is less than 10 minutes. Once the mission starts, you move to the area, set up, conduct a leader's recon of the ambush site, set up security elements, plan the firing line, place your gun teams, and eventually attack. It's not very different from a mad dash of responding to a short turnaround RFP to demolish your competition. An ambush is, however, the result of painstakingly thorough planning and preparation, which includes map reconnaissance, route planning, squad assignments, and numerous other considerations. All of this occurs before the mission starts, and it generally takes about 140 times longer than the ambush itself. After all of the preparation work has been done, you can now move everyone to the objective and place the fire line, and then wait, just like you would wait for a Task Order RFP to be issued. The waiting could be for a long time, but now you are ready.

The relative time for preparation to action is very similar to how business development must be done for the Indefinite Delivery Vehicles (IDVs). There is a lot of preparation work to complete before the Task Order RFP is issued, so that you can respond within a short span of time. The more time you have spent preparing, the better you are positioned to win.

The rules of engagement for business development for IDVs boil down to the following three principles.

1. **Learn about the upcoming Task Order RFPs way in advance and take time to prepare.** You cannot skip business development and wait for the Task Order RFP to drop, hoping to respond well when it suddenly is released.

   For all IDVs, the communication with the customer is difficult because once the task order is added to the vehicle, the one-on-one dialogue stops. The door is shut much earlier than the regular window of communicating with the customer. The reaction time to research, craft the win strategy, analyze the competition, decide on your team composition, and develop the solution is only meaningful when you know about opportunities in advance.

   The role of a business developer is to fill the pipeline of opportunities for each vehicle and it can be completed in several different ways.

   Some vehicles have a forecast of task orders, but most of them do not. The first methodology is to determine what task orders on the vehicle are expiring and when, using data from tools such as

BGov or the task order module of GovWin IQ.

The next step is to have as much face time with the customer as possible but there are other possible complications. Just like, there are different types of ambushes that dictate different types of preparation, how business development is done for IDV depends on the nature of the IDV.

There are single agency IDVs and multiple-agency IDVs, and there are differences in the approach and the level of difficulty. There may also be an additional level of complexity due to the number of awardees—the more awardees there are, usually the harder it is to prevail. The number of awardees can wary from two, to hundreds, or thousands

Single agency IDVs are agency-specific Indefinite Delivery/Indefinite Quantity (IDIQ) contracts that cover the needs of an entire agency, but generally are not open to other agencies. An example of these IDVs is DHS Eagle II. In this case, it is clear who the customer is, and whom you would need to court to build a relationship.

Multiple-agency IDVs include Governmentwide Acquisition Contracts (GWACs), Federal Supply Schedules, and other types of task order or delivery order vehicles established by one agency for use by multiple Government agencies for supplies and services. Sometimes use by other agencies is occasional or incidental. Examples include CIOSP-3 and DISA Seaport-e. In this case, it is harder to determine who the customer is, as there is a multitude. A business developer needs to realize clear priorities, and pick top the two or three customers that use this particular vehicle. Then it's necessary to focus on them. Even if these customers are in different geographic locations, it is still a business developer's task is to maximize face time. You will either have to travel a lot, or find local people who have relationships with the customer to set up post at that location and serve as your interface.

2. **Organize the team for marketing.** If you are a small business that is part of a large vehicle, it is important to maximize your team's capabilities of finding opportunities by marketing capabilities to customers. Your business developer alone will not be able to eat an elephant—whereas a team of business developers might be able. You must develop a set of marketing rules of engagement with the customer, and a unified marketing message. You also need a procedure for meeting as a team to coordinate efforts, develop action items, and add opportunities and information to your pipeline. If run correctly, this may bring you significant success.

3. **Use insiders to fill your pipeline and additional intelligence about opportunities.** When you are starting a large IDV, you may want to reach out to your teammates to see if they have people already working on a government site or with that customer, to build a connection with the customer. Once you grow your footprint with this customer by winning a few task orders, you will be able to leverage your own personnel for more work. They will need training in business development for project personnel to be effective. With training, they will recognize opportunities, market your capabilities, and know what information you need in order for you to pursue the opportunity

In a nutshell, just because task order proposal turnarounds are short does not mean investing in advance positioning and training should be skipped. The positioning and training are necessary to succeed in business development for IDVs. Much like in an over-within-minutes ambush, careful planning helps to ensure that you beat the competition during a short-turnaround proposal process.

Olessia Smotrova-Taylor, CF APMP, is the President/CEO of OST Global Solutions, Inc. (www.ostglobalsolutions.com), a business development, capture, and proposal management company that helps businesses grow in the federal market. She was the President of the APMP-NCA chapter for two years. Her Bid & Proposal Academy teaches courses in capture and proposal management, including Business Development for Project Personnel. She is a speaker and author of How to Get Government Contracts: Have a Slice of the $1 Trillion Pie. She can be reached at 301-384-3350 or otaylor@ostglobalsolutions.com

APMP Presentation Panel Discussion on Recompetes – 19 March 2014

by Russell Smith

On 19 March 2014, the APMP-NCA met at the Tysons Westin for a dinner meeting. More than 100 members and guests attended the meeting. Presentation consisted of a panel discussion addressing the subject of proposal recompetes. Moderator was **Mark Amtower**, a well-known government radio host and leading expert on LinkedIn. Panelists included (1) **Nigel Thacker**, a consultant from the UK who is an expert on recompetes and has written books on the subject; (2) **Bob Lohfeld**, principal of Lohfeld Consulting; and (3) **Kristin Dufrene**, Vice President of Proposal Services at Engility.

Moderator: Mark Amtower

The format of the presentation was the Moderator would ask a question, and each panelist would provide answers. The summary follows:

Question 1—Why do companies lose recompetes?

Bob Lohfeld – Companies lose recompetes because of the perception it is easy—like a layup shot in basketball. Yet it is really difficult. Companies often have the wrong attitude.

Kristin Dufrene – Mentions a finding in the survey of Nigel Thacker concerning recompetes in several countries that complacency is the worst problem. The incumbents know too much and don't think outside the box.

Nigel Thacker – Part of the problem is when the companies can lose a recompete. They can lose during the contract, in the proposal, or in negotiations. If a company has not done a good job and is not understanding future needs they haven't exploited their advantages.

Question 2—What is the stupidest thing you have seen in a recompete?

Nigel Thacker – One bidder got to question 13 before they even mentioned they were the incumbent. In an earlier question where they were asked to talk about their experience on a similar program, they didn't even mention the incumbent program.

Kristin Dufrene – On a debrief, her company learned that their contracting officer on a DoD proposal had been a lawyer performing temporary duty as a reserve officer. Since it was supposed to be a blind evaluation, the bidders were not supposed to have any information in the proposal that would let the reviewers know who they were. Since Kristin's company was the incumbent, they could not avoid mentioning their incumbent status in answering the RFP. The reservist-contracting officer had redacted 40% of their proposal to remove any mention of their incumbent status, so they lost the contract because of this overzealous interpretation of the rules.

> In Order to increase their profit, the incumbent fired the top 5 personnel leading the contract.

Bob Lohfeld – Bob mentions an experience helping a challenger to an incumbent on a $2.5 bid. In order to increase their profit, the incumbent fired the top five personnel leading the incumbent contract. These five personnel then joined the team of the challenger, and based on the insight, the challenger won the contract.

Question 3—What does it take to unseat an incumbent?

Kristin Dufrene – A competitor has the advantage in this environment, because he can come in with a more efficient and cost effective and shinier solution.

Bob Lohfeld – It used to be that the challenger needed better vision into a winning strategy than the incumbent. But, with the new price pressure, you now have to factor this into the equation.

Nigel Thacker – You have to understand whether the incumbent has performed or not; and understand their weaknesses as a result of your capture work. You need to talk to their staff if possible. You must get the data needed to make a fresh offer that the incumbent didn't see because of the inertia of the existing contract.

Question 1 (from the floor)—What are the barriers to unseating an incumbent?

Kristin Dufrene – Black and white requirements are the biggest barrier to unseating an incumbent. If the customer has been influenced to write a solicitation that favors the incumbent, then the challenger has a problem.

Bob Lohfeld – Shaping the RFP with requirements like you have to submit 50 resumes for a help desk job is a classic barrier to a challenger. Or selecting a competition type such as small disadvantaged business or small business.

Nigel Thacker – The only way to unseat an incumbent is to establish a deep customer relationship.

Question 2(from the floor)—How do you handle a recompete where you didn't do well on the contract?

Kristin Dufrene – Give reasons why you had problems. On one program, her company did a gap analysis a year before contract end and discovered 10 big things they had not done. They worked out a play for getting the things done; started doing them; and convinced the customer to give them the award to complete the work in the next contract.

Bob Lohfeld – There is nearly always a gap between how well the company is really doing on the contract and how well the program manager thinks the company is doing. Usually 80% of contractors and doing C grade work while 10% are doing A grade work and 10% are failing.

Nigel Thacker – You need to prevent performance problems from arising by being aware that the situation is always changing and you as the contractor need to be able to recognize changing needs and provide responsive service.

Kristin Dufrene – She quoted a survey complete by Nigel Thacker showing that about 90% of the contractors are performing at the mid-range of 50 percentile in performance.

Question 3 (from the floor)—If an incumbent writes his proposal on the premise of "don't change horses in the middle of the stream" due to risk, how do you counter that?

Nigel Thacker – This is an error to use that approach ever because the customer is not a hostage.

Bob Lohfeld – Nigel is spot on. Never will you find an evaluator who will buy that story.

Kristin Dufrene – There is no evaluation for this.

Question 4 (from the floor)—How is LPTA affecting recompetes?

Kristin Dufrene – You can lose by one penny. Best way to guard against this is to educate the customer not to use LPTA.

Bob Lohfeld – LPTA is a tragedy for all involved. LPTA is now declining. DoD undersecretary for procurement Frank Kendall has some good ideas on how to help avoid LPTA:

1. If you can't define the LPTA criteria in a service contract, then it can't be used

Left to right: Bob Lohfeld, Kristin Dufrene, and Nigel Thacker

2. If the procuring solution needs to make a judgment in regard to the solution, then LPTA can't be used
3. Where the procurement is for a commodity and the government would not receive an appreciable difference in product value, and then LPTA can be used.

Push back with your government reps.

Nigel Thacker – Said he submitted his first LPTA bid a week ago but they don't use LPTA in UK very much.

Question 5 (from the floor)—How does an incumbent give a raise to the personnel and still win the recomete?

Kristin Dufrene – You want to start on your recompete the day of the win and right size your offer on the next proposal by promoting your personnel as appropriate to other contracts.

Bob Lohfeld – One top 20 contractor he knows uses the strategy of starting out a contract underperforming for the first 2 ½ years and then catching up in the last 2 ½ years enough to win the recompete.

Nigel Thacker – If you have fixed it by the time of the recompetition, then fine. If you have consistently messed up, then consider a no bid.

Question 6 (from the floor)—How can we improve color teams?

Kristin Dufrene – Don't fall for writing a solution that doesn't agree with the RFP.

Bob Loihfeld – Get your color teams to evaluate your proposals like the government does.

Nigel Thacker – Get people who are fresh. Hugely focus on what is different in the customer needs. Get outside people on the review team.

Question 7 (from the floor)—When there is requirement for risk management and innovation, what does the incumbent need to do?

Bob Lohfeld – Don't mention you have not been very creative for the last 5 years and be innovative.

Kristin Dufrene – Innovate smartly by vetting your proposed changes in advance with the customer. Highlight the value, benefit, and advantage of your solution to the customer. Quantify efficiency.

Nigel Thacker – You need to understand what the customer really wants. One of his customers said they wanted *"Something innovative but not too new and different."* That pretty well sums it up. Innovative but not risky. You need to know how to link the proposed innovations into the detail of the contract, and you as the incumbent are in a better position than the outsider to link to the customer.

Russell Smith, CP APMP - Russell has been an active member of APMP since 1994. He served on the Board from 2000 thru 2004. During that time, he completed one term as Program committee lead and one term as President of the NCA chapter

Grab Their Attention with Clear Writing

by Tim Pepper

Evaluators often get saddled with reading multiple proposals as companies compete for contracts. Experienced reviewers face the stack of binders by resigning themselves to slogging through seemingly endless pages of tired language and unsubstantiated hyperbole. As one government reviewer once said to me, *"You're all the best. Quit telling us about yourselves and get to the point. Let me know what you'll do for me."* ***How?*** Engage readers up front with active language, weave their hot-button issues into the text, and place their contract in proper context. To the right, consider the two example openings provided.

Assuming both companies are equally qualified and can support the opening claims, which proposal do you believe would score higher? Neither is perfect, but Opening A is clearly more engaging for the reader. If the rest of the proposal follows the writing style of the opening section there is a good chance the reviewer will actually read it. **Opening B** foreshadows a heavy task to overcome the temptation to mentally check out and skim through the text as the reviewer's eyes glaze over.

Opening A draws from (back then) headlines in an attempt to place the competitive contract against the backdrop of world events. The customer's task is connected to a sense of urgency and critical importance. They are pulled into the story from the start and further engaged as their hot button needs and issues are listed. (i.e. two parallel efforts, compressed timeline, innovative solutions, etc.) The customer is named three times, the company once, and the RFP once.

Opening B offers no context. It could have been recycled from a proposal 40 years ago or last month. The language talks about the company from the first sentence (pleased to submit), seeks to impress with size and continues expressing opinions ("We believe…") before minimally touching on contract needs (training, testing, and security solutions). The company is mentioned seven times, the customer twice and the RFP once.

Opening A

World events including the Christmas Day underwear bombing attempt on Northwest Flight 253 clearly demonstrate that enemies of the United States are determined to cause destruction, incite panic, and spread fear to the society at large. The <customer/agency> is tasked with developing and validating concepts to address critical issues of national security far exceeding a lone terrorist on a single airplane. This <RFP title> contract with its two parallel efforts encompasses a critically urgent, highly visible, and complex project within a compressed timeline.
<Customer/command/agency> needs a team with the experience, expertise, and exceptionally skilled staff offering proven solutions to begin immediate support upon award. <Customer> needs more than a nice proposal, they need answers. <Team Awesome> offers a low risk, proven approach and successful history leading contract teams to address critical and vital matters of national security.

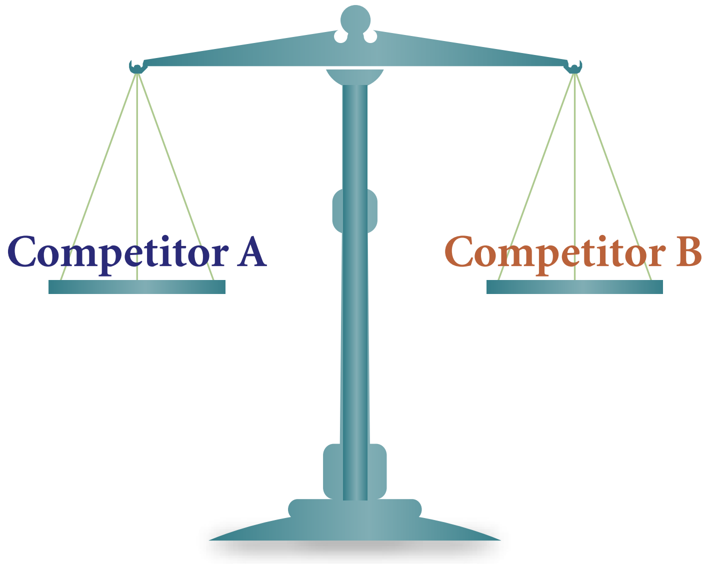
Opening B

<Big Prime Company>, hereinafter referred to as <BPC>, is pleased to submit this fully compliant proposal as a prime contractor in support of the <current> solicitation. <BPC> is a joint venture representing $X.XB in annual revenues, established specifically to leverage the extensive <BPC> presence and capabilities across the <relevant agency> environment. It is a uniquely innovative approach to providing <RFP issuing agency> and its customer organizations with cost-effective access to the full breadth of <BPC> technical strengths and resources. We believe that <BPC> is the go-to company on which <RFP issuing agency> can rely for comprehensive training, testing, and security solutions—we are committed to delivering world-class results across all of the contract functional, SOW, and product areas. This approach ensures efficient one-stop, low-cost access across the <BPC> and teammate companies.

Opening A connects with the customer and acknowledges the critical issues and concerns. The writing encourages you to read on to find out how Team Awesome will approach the tasks. The arrogant self-focused tone of Opening B pushes the reader away. After a few lines the reader hears "blah, blah, sales speak, blah" in his/her head and scans for relevant content and an escape point.

Opening A boldly takes a stand on customer hot buttons: "<Customer/command/agency> needs a team with the experience, expertise, and exceptionally skilled staff offering proven solutions to begin immediate support upon award." If these points flow from proper homework during the capture phase and the proposal team backs up the claims later in the writing, they may have scored for the win with this early statement. If they have missed the customer's true needs, they may lose up front. The actual solution summary is missing. The reader lacks information about how Team Awesome plans to do the work in this opening, but hopefully is intrigued enough to read further.

Opening B makes claims as well, but ones much harder to substantiate in the presented opening: "It is a uniquely innovative approach…committed to delivering world-class results…This approach ensures efficient one-stop, low-cost access across the <BPC> and teammate companies." The claims raise questions that must be strongly answered in the supporting sections in order to overcome the arrogance factor. How can this bidder claim to be uniquely innovative? Don't other large primes offer similar approaches? What makes their delivery world class? What approach? Nothing is clearly presented in the opening. A reader may infer a behemoth prime with token teammates as part of the solution. They may not want to read further but must continue if there is any hope to find answers.



Government procurement is bureaucratic, but our writing does not have to be. Customers want to work with people who engage them, grasp their needs and can solve their problems. Given the choice between two equally capable bidders, it could come down to how well you present your approach in the written word. Your proposal offers a glimpse of their future with you. Will it be creative, collaborative, and flexible? Or will it be dry, formal, and ponderous? Who do you want to be – A or B?

Tim Pepper applies over 19 years of experience in capture, proposal, and program management for the Federal and DoD markets. He is a Senior Proposal Manager and Proposal Center Manager for General Dynamics Information Technology in Chesapeake, VA. He leads proposal development (managing, writing, editing and producing) for pursuit and capture of large corporate strategic and tactical bids involving multiple divisions and subcontractors. He holds a Bachelor's Degree in Business Administration/Computer Information Systems from Saint Leo University and has been CF APMP-certified since 2010.

APMP-NCA & APMP International Upcoming Events

Bid and Proposal Con

REGISTER!

Monday, May 26 – Thursday, May 29, 2014

Sheraton Chicago Hotel & Towers
301 E North Water St.
Chicago, IL 60611

APMP's Bid & Proposal Con is the world's largest event for proposal, bid, tender, capture, business development and graphics professionals. Global industry players come to APMP's Bid & Proposal Con seeking tested information, proven strategies, and best practices to help capture, write, produce, manage proposals and increase win rates. They leave, armed with valuable content from these areas of interest:

- APMP Certification
- Business Development
- Capture
- Commercial
- Federal
- Software & Graphics
- Team Building

Check out the Full Schedule here

Call for Speakers!

It's that time of year again! APMP-NCA is gearing up for the 2014 Mid-Atlantic Conference & Expo, **November 19-20, 2014**. We are now seeking presenters for Day 2. This is a great opportunity to help educate your peers and earn recognition as a thought-leader in our industry. For information on how to present, Click Here. Submission deadline is **April 30th**.

2014 Conference Theme.

Registration will be opening soon for the 2014 Mid-Atlantic Conference & Expo. The theme this year is "The New Normal: Strategies for Tomorrow's Market." This 2-day event in November features specialized training on Day 1 and innovative presentations on Day 2. Learn how to stay ahead of the curve in this evolving market.

May Speaker Series | REGISTER!

The Price is Right… or is it?

May 14, 2014—5:30 to 8:30 PM

In the era of Sequestration and LPTA, pricing has become more important than ever before. Pricing is a challenge for all companies with pricers / BD teams under pressure to win in a more competitive environment. Our interactive panel this May includes recognized strategic pricing experts from both Industry and Government. Come away with valuable insights on how to avoid common pitfalls and develop a winning price strategy. This panel is moderated by Lee Cooper, a high-level BD executive with extensive hands-on experience leading pricing strategy for large and small business on programs valued up to $1.5 B.

With budgets falling, it has become necessary for organizations to take a more strategic view of pricing. Strategic pricing involves input from business development, capture, technical solutions, proposal management, and of course pricing, as well as the executive suite. More and more, developing the winning price involves having input from competitive analysis and price to win. The panel will discuss real life cases of how companies mobilized the judgment to put solution, price, and risk together into a winning package.

This lively and illuminating discussion will include equal parts industry and government speakers. Learn what the end-user is looking for in pricing, how they identify "best price", and how it all relates to their independent government estimates.

When: May 14, 2014 – 5:30 to 8:30 PM

Where: Westin, Tysons Corner

Cost: Members, $75 – Non-Members, $85

(Save money by taking advantage of Early Bird Discounts through May 2nd)

Your panel:

Jeff Saylor, Director of Contract Services, Policy and Administration -- U.S. Department of Labor's Employment Training Administration (ETA). Jeff has over 26 years in Federal government, all of which have been in acquisition and grants management. In addition to the Department of Labor, he has held leadership/supervisory positions at the Department of Education's Office of Federal Student Aid, the Department of Justice's Drug Enforcement Administration and the Federal Communications Commission. Prior to his current position in ETA, Jeff served as the Chief of the Division of Federal Assistance, where he oversaw ETA's $8 billion grant programs. He is FAC-C Level III certified and holds a Master's in Public Administration from George Mason University.

Gary Fitch, President of White Owl Systems, a pricing consultant to government contractor firms. Gary is a finance and pricing expert with over 30 years experience in the Information Technology Industry working on complex Systems Integration projects in a Project / Business Management / Pricing capacity. Experience includes administration, analysis and pricing of projects for Message Switching Systems (Networks), Satellite and Landline Communications Systems, and Networked Mainframe / Micro Computer Acquisition, Installation, Operations and Maintenance efforts. Also Intelligence community work overseas and domestically (All Source Analysis etc). Gary has led in the strategic pricing of opportunities as large as a $6 B IT program for the IRS. He has also helped to manage / price workloads as high as 40 concurrent proposals. His strength as a strategic pricing expert is enhanced by his varied experience in Government (Federal, State, Local, Higher Ed & Healthcare)/Commercial background in business management (hands-on CFO, Contracts/Subcontracts/Purchasing/Outsourcing and Financial/Estimating Management, & Technical Staff) in the communications/computer/engineering/intelligence and Services fields.

Jacob George, Director of Finance at Red Team consulting. Jacob is a Pricing Strategist Consultant at Red Team Consulting, providing pricing and program management strategies for multi-million dollar US Federal Government procurements ranging from $5 million to $20 billion dollar contracts. Combined with his unique combination of proven business development, solution architecture, customer delivery, and management skills, he is an expert in providing a wide variety of cost & price strategy and project management consulting services. Additionally, Mr. George oversees all finance, accounting, forecasting, and budgeting operations at Red Team Consulting. Mr. George has successfully participated in multiple industries including IT infrastructure; design-build, combined arms support training/deployment, facility guard services, business process reengineering, air traffic management, naval construction/procurement, financial audit, health/human services and environmental engineering throughout the U.S. and worldwide. To complement his cost accounting and pricing strategy experience, he also possesses a large spectrum of complimentary experience in program performance architecture development, Earned Value Management, DCAA compliance/audit proficiency, and competitive analysis.

Moderator:

Lee Cooper is an industry consultant with a 30-year career as a business Development lead for large and small business that has included extensive hands-on work with strategic pricing. During his career, he personally served as strategic pricing manager of the most important programs bid by his group. He has personally served as pricing volume manager on opportunities valued at over $1 billion. Lee has been the strategic pricing manager on competitions involving IT services and training services programs in national and international settings. He has a gift of personality and character that has enhanced his work throughout his career. Lee is an excellent speaker and an experienced moderator who will grace our platform.

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.

Continuing Professional Development (CPD)

Did You Know???

That Continuing Professional Development (CPD) is a vital part of the APMP Certification Program, and we want to show you how to earn and track Continuing Education Units (CEUs). CEUs are important because they:

- Represent your commitment to your CPD
- Track credits for educational opportunities you have taken
- Are periodically audited by the APMP Chief Examiner. The Chief Examiner checks about 60 percent of each APMP-certified member's CEUs in each audit cycle.

APMP CEU Requirements

APMP-certified members must earn this many CEUs ***every 2 years***:

Certification Level	CEUs
Foundation	20
Practitioner	40
Professional	40

How to Earn CEUs

Home Based Learning	CEUs
Subjects studied should be relevant to a proposals environment, meet a specified purpose, and use knowledgeable resources. Includes: • Private study, structured reading on particular themes or topics. • Use of audio, video, distance learning or multi-media resources	5
ACTION ITEM • Summarize in less than 350 words: the reason for study, key learning point, a summary of the number of hours spent, and reference materials used	

Training	CEUs
Includes: • Training, workshops, seminars, or courses by external (commercial or educational organizations) or • (Internal company training) resources, attended that relate to any aspect of the Business Development Process	
ACTION ITEM • Summarize in less than 350 words: a description of the key learning points	
Training Approved by APMP (minimum 4 Hours, may include multiple short courses)	5
Training Approved by the APMP (1 day)	8
Training Approved by the APMP (2 days or more)	10
e-learning (minimum of 4 hours) approved by the APMP (determined during assessment)	up to 10
Training not approved by the APMP (minimum of 4 hours, may include multiple short courses)	3
e-learning, not approved by APMP (minimum of 4 hours)	3

Preparation of Materials*	CEUs up to 20
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ACTION ITEM • Provide a copy of the published article and details regarding where and when the article was published	
Website Material and Blog Moderation	5
Contributions to professional organizations, commercial companies and non-profit organization web site material and articles	10
Moderating professional blogs for a continuous period in excess of 3 months. A professional blog is defined as a blog relating to business development	10
ACTION ITEM • Provide a copy of the published website article or details of length of time acting as a moderator to a professional blog	
Presentations at Conferences Includes: • Presentation at a professional organization, commercial company or not for profit organization's conference, symposia, seminar, meeting, lecture, or workshop	
ACTION ITEM • Provide a copy of the presentation and details of where and when the presentation was made	
Published Books that are publicly available for topics related to Business Development	20
ACTION ITEM • Provide details of the book name, publisher and date of publication	
Revisions to Previously Published Books	10
ACTION ITEM • Provide details of the revisions made, and the date the revisions were published	

Event Attendance*	CEUs
Full-day (or more) conference, symposia, seminar, meeting conducted by a professional organization or commercial/not for profit organization	10
Less than a full-day conference, symposia, seminar, meeting conducted by a professional organization or commercial/not for profit organization	5
Local APMP Chapter, or other Business Development professional body meeting	5
ACTION ITEM • Maintain a record card signed by a board member or chapter leader, as evidence of attendance	

Serve the Profession as a Volunteer for a full year (pro rata)	CEUs
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ACTION ITEM • Maintain a record signed by the local or main board CEO	

** Individuals who attend a full event and are speakers at that event qualify to claim Event Attendance and Preparation of Materials CEUs.*

APMP-NCA Board of Directors Meetings are Open to Members

The Board of Directors for APMP-NCA meets the first Tuesday of every month. Every other meeting is a virtual meeting via a telephone conference. If you would like to join a meeting, contact us by going to http://www.apmpnca.org/contact/.

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