

Our mission is to advance the arts, sciences, and technology of new business acquisition and to promote the professionalism of those engaged in those pursuits.

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CEO/COO Corner

A new era... or at least a new attitude

At many of the APMP functions we've attended over the past year, there seems to be a renewed interest and enthusiasm for our organization. Looking at our shift in membership to a greater variation in sector and the number of younger (or maybe just younger looking?) members, you might try to attribute this to new participants who are bringing new ideas and skill sets to bear.

But at closer look, the enthusiasm and ideas are coming from all areas, including some of our most tenured members. We've talked incessantly about BD-CMM, P-XML, knowledge management, and other key initiatives, but it's so much more than that. It's a greater willingness to get involved, or maybe speak up where you wouldn't have before. It's the conversations you have and hear when we take the time to get together at a chapter meeting or the annual conference. There's a different tone – something positive, optimistic, it almost sounds likewe're having fun?

So what's the impetus behind all of this? What's changed to take us from a rather dry but productive and focused group to one with such energy and excitement?

There seems to be a common characteristic present these days – confidence. Our members have always had confidence in their bid management skills, but this is a little more than that. It's confidence in our ability to impact our businesses through more than just process and project management – we've begun to recognize that the work that we do every day has broader implications across our organizations, whether it be through our ability to manage content, articulate a customer's business need, or to successfully bring cross-functional teams together. And we've noticed that we seem to do these things better than anyone else.

That confidence is translating into an even greater shift in our make up. The joke has always been that nobody ever plans to become a proposal professional; it just seems to happen. Now, as others see what we have achieved and the future potential of those with our skills, we're maybe noticing that proposals are viewed as a pretty good place to be, and those with aspirations to succeed might well be realizing that they should be starting out in our area to learn from the best rather than landing there by default.

So welcome to the new era (or attitude) of proposal professionals. We love what we do, we do it well, and we're having a positive impact on our businesses in multiple areas. And as we at APMP continue to drive standards such as BD-CMM, P-XML, and accreditation, we are well positioned to achieve success as both an organization and as the individuals who consistently meet and exceed these standards.

—Mary Mills & Kelli Stephenson



Welcome From the Editor

It's close to the end of another year – a time when everyone is especially busy with a multitude of things to get finished. I hope you'll find time to relax and enjoy this issue of the Journal.

Have you ever sat back while working on a proposal and thought, "There has got to be a better way?" Were you unsure how to begin to organize past proposals, improve your process, or even set up a proposal center where none existed? Joan Bettinger's article "Creating a Proposal Services Department" may give you the foundation you need.

Russell Smith has provided us with his viewpoints as to when it may be more efficient to hire consultants rather than permanent staff. At some time, most proposal management professionals have tried to calculate the return on investment of hiring a consultant – whether it is in money, time, or quality of product – while balancing the time and talents of staff. This article could help make the determination easier for you.

Today there are more organizations than ever before dedicated to providing women in the proposal field the support and resources needed to succeed. Colleen Jolly has compiled a listing of these associations for you to contact. Perhaps you'll find the networking opportunity that will allow you to take the next step on your career track.

Ask anyone who works in the proposal field, and most will say you have to be a little crazy to do this job! However, as Jayme Sokolow reports, there is now scientific evidence that proposal professionals share a genetic makeup that predisposes us to exhibit common traits. It's a fascinating study that I'm sure you will enjoy.

We are currently working on a series of articles about the founding and history of APMP. Anyone who has memorabilia (e.g., early conference brochures, local chapter charters, or photographs) that they would like to see included is asked to contact me at jelder@caci.com.

From everyone at the *Journal* staff, have a safe and happy holiday season.

John

The end of the year is the perfect time to congratulate yourself on your successes, practice lessons learned on your challenges, and prepare yourself for the next mountain.





APMP™

2005 Annual Conference

The 2005 Annual Conference is adding a new element – one critical to success of our mission and to winning – Balance. The location for the conference sets the stage for:

Winning and Living ... Achieving the Balance

When: June 7 through 10, 2005
Where: Sheraton Wild Horse Pass, Phoenix, Arizona



Located in the Sonoran Desert, it offers a quiet serenity created by Native American tribes who found haven here. The ancient vistas, mountains, and roaming wild horses remain untouched. Designed to be an authentic representation of the Gila River Indian heritage and culture, the resort offers a recreational, educational, and inspirational experience. The architecture, design, art, and legends of the Akimel O'otham and Pee Posh tribes are celebrated in every detail imaginable, indoors and out.

History

The Akimel O'otham Indians trace their roots to the Hu Hu Kam (Hohokam) who farmed the Gila River Valley from 300 B.C. to 1450 A.D. The Hohokam developed an extensive irrigation system of canals, still used today, which gave birth to farming in the desert. The Akimel O'otham and Pee Posh, sometimes called the Pima and Maricopa tribes respectively, were hospitable and friendly, welcoming settlers and transforming a hostile territory into a temporary sanctuary – just as they continue to do now with the Wild Horse Pass Resort.



Resort Features

- A 2.5-mile replica of the Gila River meandering through the resort grounds – scenic boat rides shuttle guests to the golf club and casino
- A riverside pool with cascading waterfalls and bridges designed after the ancient Casa Grande Ruins
- Wild horses roaming the surround desert land and visible from the resort
- The Aji Spa, offering massage therapy, a full-service salon for men and women, and a fitness center
- Numerous recreation choices including an equestrian center offering trail rides, tennis courts, jogging trails, two 18-hole Troon-managed golf courses, a casino, and a kids' club



Please visit APMP's Website
www.apmp.org for more information.

Welkom!

Dutch Chapter of APMP

The staff of Proposal Management would like to extend a hearty **Welkom!** to the newest chapter of the APMP. The Dutch APMP is the first international chapter formed outside of the United Kingdom and is headquartered in Utrecht, the Netherlands.

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Mission Statement: Dutch APMP seeks to advance the arts, sciences, and technology of proposal management in the Netherlands, and promote the professionalism of those engaged in those pursuits through the sharing of non-proprietary proposal methods, approaches, and processes.



APMP[®]
*Dutch Association of Proposal
Management Professionals*

Attention All Editors and Proofreaders!

*...we have some good news
...and some bad news.*



First, the good news...

Spell Check DOES NOT WORK!!! Please put the following poem into a Word document and see for yourself....

The Spell Czech Cur

*My computer has a spell Czech cur
Witch is vary good four me
Four eye yam the world's worst speller
And half bin sense grayed three
Aye no eye cant believe it
Bee cuss now eye spell sew whale
Butt eye oh it awl two spell Czech
Aye you stew spell lie kale
The led terse whir con fusing
Eye could know spell words write
Butt now that eye half spell Czech
Eye yam an edit terse delight
Sew now bee fore aye Finnish
I'll push the spell Czech key
And gist ass aye eggs peck dead
The mush sheen awe grease with me!*

And now the bad news...

Perhaps we don't need Spell Check after all !

*I cdnuolt blveiee taht I cluod
aulacty uesdnatnrd waht I was
rdanieg The phaonmneal pweor of the
hmuan mnid. Aoccdrnig to a rscheearch
at Cmabrigde Uinervtisy, it deosn't mtttaer
inwaht oredr the ltteers in a wrod are, the
olny iprmoatnt tihng is taht the frist and
lsat ltteer be in the rghit pclae. The rset can
be a taotl mses and you can sitll raed it
wouthit a porbelm. Tihs is bcuseae the
huamn mnid deos not raed ervey lteter
by istlef, but the wrod as a wlohe.
Amzanig huh?*

Yaeh and I awlyas thought slpeling was ipmorantt!



Creating a Proposal Services Department



by Joan Bettinger

Ever since you can remember, your company has been responding to RFPs, writing proposals, and creating presentations ad hoc. You have reinvented the wheel so many times, you are just plain dizzy. So you have decided it is time to create a department that does nothing but respond to RFPs and write proposals. But first, you need to figure out how to build such a department, and then you will need to persuade upper management that it is necessary.



Step 1 in your planning phase should be to first determine specific tasks and objectives.

To make the best impression on your audience and increase your chances for success, present your idea in a format that executives are familiar with — the Business Plan.

This Business Plan applies both to commercial and government proposals. Some steps and recommendations, however, such as sending out questions to Subject Matter Experts, are more appropriate for commercial rather than business proposals.

The Business Plan

Step One: Determine Your Tasks and Objectives

The first section of your Business Plan should be a clear delineation of what responsibilities your new team will handle. Be specific. Will you collect the content? Edit and proof the content? Will you be responsible for maintaining a consistent voice throughout the documents? Will your team be responsible for collating and binding the responses?

Your objective to maintain consistent messaging will hit home with the executives.

Next, determine your objectives. Are they to add more graphics and a stylistic look to RFP responses? Maintain consistent and accurate messaging to clients? Improve the process? Develop a database of Q&As? Create a customized template for ease in responding to RFPs? Whatever you plan to accomplish, include it in this section. Also, be sure to reiterate the key internal pains your company is experiencing. For instance, if you have had several sales people complain that the brochures they give to clients have one set of facts about your company, but RFP responses use other statistics, your objective to maintain consistent messaging will hit home with the executives.

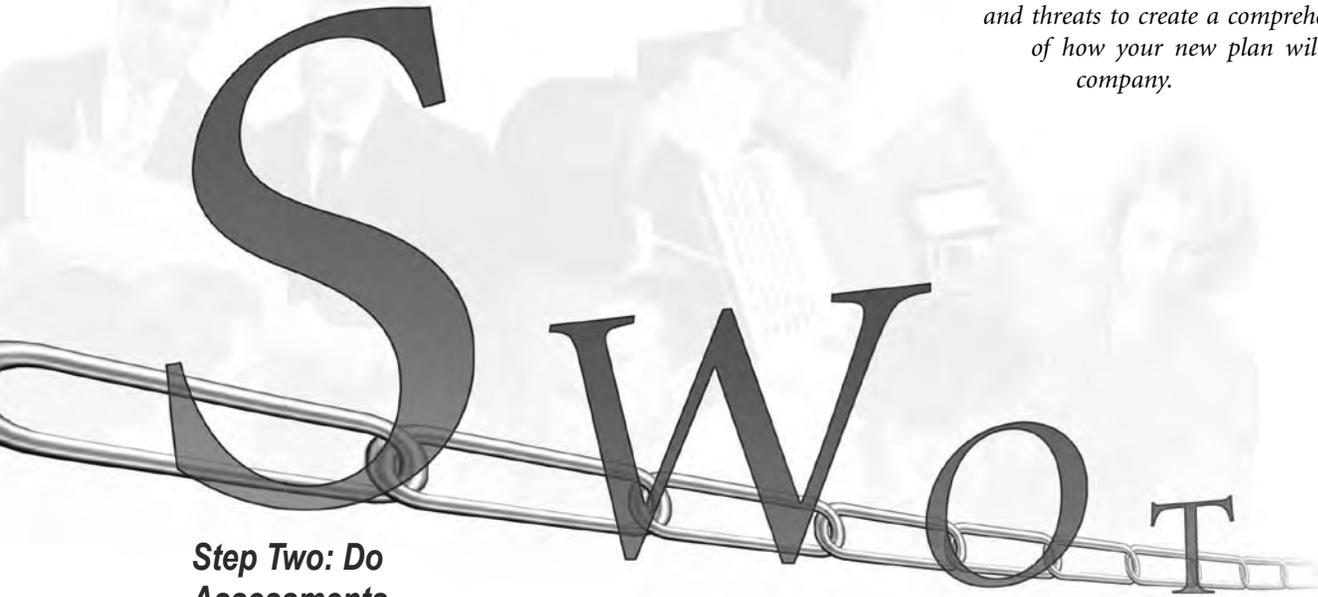
Assessing the Situation

Ask Yourself the Following Questions:

- How are responses done now? Do staff members just use a response from a similar proposal they used last year because finding something on their own hard drive is easier than researching a new answer? Does it take as much time to track down a good response as it does to just rewrite it (again) from scratch?
- What problems does this create for the company as a whole? Are you losing business you normally would have won due to oversights that were not caught because everyone ran out of time?
- What problems does not having a dedicated team create for employees? Do employees fight over who doesn't have to do this one because they did the last one? Are non-writers being asked to respond to RFPs and then cannot really do a good job? How does this affect employee morale?



Step 2 analyzes the interconnections of your strengths, weaknesses, potential opportunities and threats to create a comprehensive view of how your new plan will affect the company.



Step Two: Do Assessments

Next, you need to gather data that will prove your case. Your Business Plan should include an assessment of the current situation and a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis.

Assess the Current Situation

As you analyze the current situation, questions to address may include those found in the sidebar on page 13.

This is a good chance to highlight that there are actually people out there who *apply* for these types of jobs because they *want* to do this work. It is also an opportunity for you to really emphasize all the reasons why responding to RFPs is such an arduous task right now. Later, in the recommendation section, you can show how your ideas can help the company overcome these problems.

A vital aspect to your Business Plan needs to include a strategy on how you plan to alleviate problems.

SWOT Analysis

Next, be sure to include a SWOT Analysis. If you have taken any marketing classes, you already know this term. The purpose of the SWOT analysis is to show how the new plan will affect the company. The analysis might include:

- **Strengths.** What strengths does your company *currently* have? For example, does your company have an excellent reputation and outstanding subject matter expertise? Do you have current staff you can move into these positions? What strengths could this new department bring to the company?

- **Weaknesses.** Will you have to build a database of current answers? Does your company have the money to invest in software and people to do this job correctly? Have you lost business because of poor responses, or worse, lack of ability to respond at all to an opportunity?
- **Opportunities.** What opportunities will this department, once created, bring to your company? Will resources currently used to respond to RFPs be realigned in a more profitable way? Can you incorporate existing processes? Will this free up significant time for your SMEs?
- **Threats.** Are you duplicating services anywhere? If you cannot service all requests (perhaps because you will be limited in staff size), will some requests be turned away, creating confusion and frustration with those who are not helped? Will this eliminate some people's jobs? (If they are good employees, encourage them to be on the team!)

Step Three: Research An RFP Response Software Package

I highly recommend that you purchase an RFP response software package. One of the most likely pains you are having now is searching for content, and then making sure that content is actually up-to-date. A vital aspect to your Business Plan needs to include a strategy on how you plan to alleviate these problems. An RFP response software package can easily help solve this and many other problems. There are several options on the market. The best ones incorporate a database, search tool, and integration with Microsoft Word. The software package should also include a feature that allows you to tag each record with a "next review date" and the SME. Armed with this information, you will know when to send out each record for review, and to whom it should be sent.

Do a search in Google on “RFP response systems” and you will get some good leads to investigate. Do your research and ask for demos, then pick the software package that fits your needs. Once you use an RFP response system, you will never want to — or need to — search for a past response in an old RFP. This software alone can be a significant time-saver.

Gauge number of staff needed using at least the last two years of data as RFPs are increasingly becoming the vehicle of choice.

Step Four: Determine Necessary Staff Size

In this next step, you determine how many people are needed to handle your company’s current RFP response workload. This requires a little internal research. You need to find out how many RFPs your company responds to in an average year. Try to gauge the number by using at least the last two years of data, as RFPs are increasingly becoming the vehicle of choice used by clients to determine a vendor.

Remember to calculate your needs for positions other than just the sheer number of RFPs. The number of staff should be based on the number of RFPs you respond to in a year *as well as the complexity* of the RFPs you receive. Some companies respond to hundreds of RFPs per year, but they are relatively simple. Other companies may respond to fewer RFPs each year, but the RFPs may be government RFPs with complex requirements. Ask yourself questions, such as “Do you have enough RFPs per year to justify hiring someone to just handle the database/content management (Database Administrator)?” “Enough to hire someone to handle just the printing, collating and binding of your proposals (Proposal Coordinator)?” I have managed departments both with and without these positions, and if you can justify these roles with your internal numbers, having someone dedicated to these tasks is overwhelmingly easier and more efficient.

Within this step, create a staffing plan that examines the type of employees you are looking for (e.g., willing to work late when necessary, strong writing abilities, strong project management skills, previous proposal writing experience, experience in your company’s industry).

Step Five: Create a Process Flow Plan

Next, you need to consider how the process should work. Because you and your colleagues do not want to be a slave to process, be sure to have a good idea how the work should flow to — and through — your department. Consider the list at right.

Creating a Process Flow Plan

Ask Yourself the Following Questions:

- What will be the rules of engagement for requesting help from the proposal team?
- Who will qualify the bid?
- Who will determine what resources will be assigned to each bid?
- Who will prioritize the workload?
- Will formal review teams (known in the industry as red and green teams) be necessary—or maybe just for the “big ones?”
- What are the “big ones?”
- Who will set the timeline?
- Who will make sure everyone actually follows the timeline? (See the “Other Considerations – Timelines, and How Come Nobody Follows Them” section for more detailed information on timelines.)



This is also the time to create any new tools you want to use. I suggest creating a Proposal Plan (Figure 1). The Proposal Plan should include everything the proposal team needs to know. Some of the information to include in the Proposal Plan is available from the RFP itself, and just needs to be put in one easy-to-find master document; other information only a sales person or account manager can answer. A small sampling of the required information may include:

- Do we have permission to download the client’s logo from their Website?
- What is the formal client name that should be used on the cover page and in the header? What is the informal name of the client that should be used throughout the rest of the proposal?
- How many hard copies need to be sent?
- Who are the resources assigned to this RFP?
- What type of binding is required or is the sales person requesting?

I insist that my team use a Proposal Plan for every RFP we do. This small document has saved us countless time not having to page through an RFP to find the address to ship the response to, or to remember how many copies we need to send. In addition, we store each Proposal Plan in the client folder on a shared drive. That way, the Proposal Plan is right at everyone’s fingertips — including those of the Proposal Coordinator, who has to print and put ev-

everything together for us. By having this simple document available to everyone on the team, people can get started early on their tasks, and others can help out more easily in crunch times.

Tracking statistics is important— they can help you analyze activities and accomplishments.

Step Six: Create a Plan for Tracking All Your Information and Activities

Every Proposal Department needs to accurately track every RFP, proposal, and presentation worked on in the department. I have found that tracking everything is important. You may be surprised later how these statistics can help you analyze activities and accomplishments. Here are just a few ideas of information you should track:

- Track RFPs by product or service, sales region, and type of binding.
- Track internal staff roles (e.g., proposal writer, SME, sales person, etc.). By tracking this information and comparing it against finalist and win/loss ratios, you can determine which of your staff members are stronger with certain types of responses.

Figure 1. Sample Proposal Plan.

Proposal Services Department Proposal Plan			
Players	Dates	Production	Shipping Instructions
Sales/Account manager:	Date RFP issued:	# of copies:	Address:
Proposal Writer:	Date RFP received by Sales:	What color binder should be used?	Contact name:
SMEs:	Date RFP received by Proposal Department:	Tab order:	Contact phone:
Who needs to review each draft?	Date RFP is due:	Exhibits to be used:	Contact e-mail:
Type of request (RFP/presentation information/questionnaire/stand alone proposal):	Ship date:	House copy instructions:	Special instructions:
About the Client	About the RFP		
Name of RFP:	What services are we providing?		
Name of client to be used on cover page and header:	Who sent the RFP? (procurement, client, consultant):		
Name of client to be used throughout the rest of the response:			
Industry of client:			
OK to download logo from client's Website?			
Client's Web address:			

- Track by types of responses — RFPs, stand-alone proposals, presentations, estimates, and informal questionnaires (perhaps questions sent in an e-mail to a sales rep).
- Track how you receive an RFP (did the sales person receive it? Was it sent blindly from a procurement department? Was it sent direct from a particular client contact? From a consulting house?)
- Other items you should track include:
 - How many questions are in the RFP? How many pages in the final response? How many questions was the Proposal Team able to answer without the use of an SME?

By tracking these items, you will soon be able to prove creating this department was a good idea. Showing how many questions your new team was able to take off the plate of the SMEs helps prove valuable staff time is being saved.

- Did you make the finals? Did you win the business? Again, important points for future analyses.
- When was the RFP received by the sales person, and when did Proposal Services receive it? Tracking dates can help show that some sales people have a tendency to sit on RFPs, causing the rest of the company to do hand flips getting the response out on time. This information can help entice management to actually do something about procrastinating sales people.

Please refer to Figure 2 to review a sample Tracking Report.

Create a survey to be completed after each RFP—You want to know what you are doing right and where you can improve.



Be diligent! Create and manage a plan for tracking all of your information and activities.

Step Seven: Create a Plan to Measure the Quality of Your Work

Create a survey to be completed after each RFP (at least for the first six months). You want to know what you are doing right, and where you can improve. Ask questions such as, “Was the final draft well-written?” “Did we use the right amount of graphics?” “If we didn’t meet our timeline, what can we do differently in the future?” “What can Proposal Services do differently next time?”

I have found this to be a remarkably easy way to prove how much my team has improved the quality of responses. I always include a comment box, and we usually get comments, such as “best one ever,” “great process—I knew exactly what to expect.”

Improvement in quality is hard to measure quantitatively; therefore, you must rely on anecdotal episodes and comments from your colleagues. Within a few days of opening a new Proposal Services department, I put an Excel spreadsheet out on a common drive and ask all the team members to enter any comments they receive on their work or the department as a whole. When I actually had the opportunity to present these comments to my

Figure 2. Sample Tracking Report.

RFP	Insurer of RFP	Sales Person	Proposal Writer	Product/ Service	Rec'd in Sales	Rec'd in PS	# of Questions in RFP	# of Questions Answered by SMEs	Type of Request	Binders Used	Ship Date	Make Finalist?	Sold Status
Client 2	Direct from Client	Bob Anderson	Bill Johnson	Service 2	4/26/2004	5/3/2004	18	8	RFP	1" Red Plastic	5/12/2004	Pending	Sold
Client 3	Client Contact- Barb Nelson	Debbie Johnson	Dan Fairfield	Product 1	6/8/2004	6/9/2004	20	8	RFP	2" Standard Company Binder	6/30/2004	Yes	Pending
Client 1	Hewitt & Associates	John Doe	John Doe	Product 1	6/22/2004	7/1/2004	27	12	RFP	1" Standard Company Binder	7/22/2004	Yes	Pending



Measure quality through surveys, reports and team member input. Use this information to affect quality improvement.

boss, we had pages of glowing comments from our colleagues that helped prove we were doing excellent work. I use a simple form that includes the comment, who the comment was from, the date the comment was made, and what the comment was in response to (e.g., a specific RFP section).

Another idea is to “grade” each survey you receive. For example, if you ask “By the time of the final draft, were all of the responses well-written?” and have a 1-5 scale (with one being “poor” and five being “excellent”), add up the scores from each survey respondent and record this in your tracking report. Hopefully, you will receive high scores, and can use this information to give a more quantifiable report of quality improvement.

Tracking statistics is important—they can help you analyze activities and accomplishments.

Step Eight: Create a Budget

You cannot write a Business Plan without an estimated budget necessary to do proposals continuously. Do your research. Write down everything you will need to make this department work. Include any special equipment you will need, such as a scanner, dedicated color and/or black/white printer, CD burner, and a larger monitor. I once worked for a company that had more than 50 people using one color printer. I had to share a vital resource to get my job done with people who were printing off pretty calendars and letters that did not need to be in color (and least not on my ship day). You can imagine how many times I secretly cancelled their jobs so that I could get my deadline-oriented proposal out the door on time. Negotiate hard for your own printer. In most cases, you will need it!

Step Nine: Make Recommendations

After you have gathered all your data, it is time to make a recommendation. Draw on all the data you gathered and any RFPs your team will be able to respond to with a smaller

staff. For instance, if you said you need four people but they only let you hire two, figure out how many RFPs those two people can handle, and have a game plan, such as “the account people will need to do their own RFPs,” or your team will only handle the “big” RFPs (you will need to define “big”). Use the data you gathered to come up with some options. You do not necessarily have to put these options in your Business Plan, but you should be prepared to have these discussions should they arise.

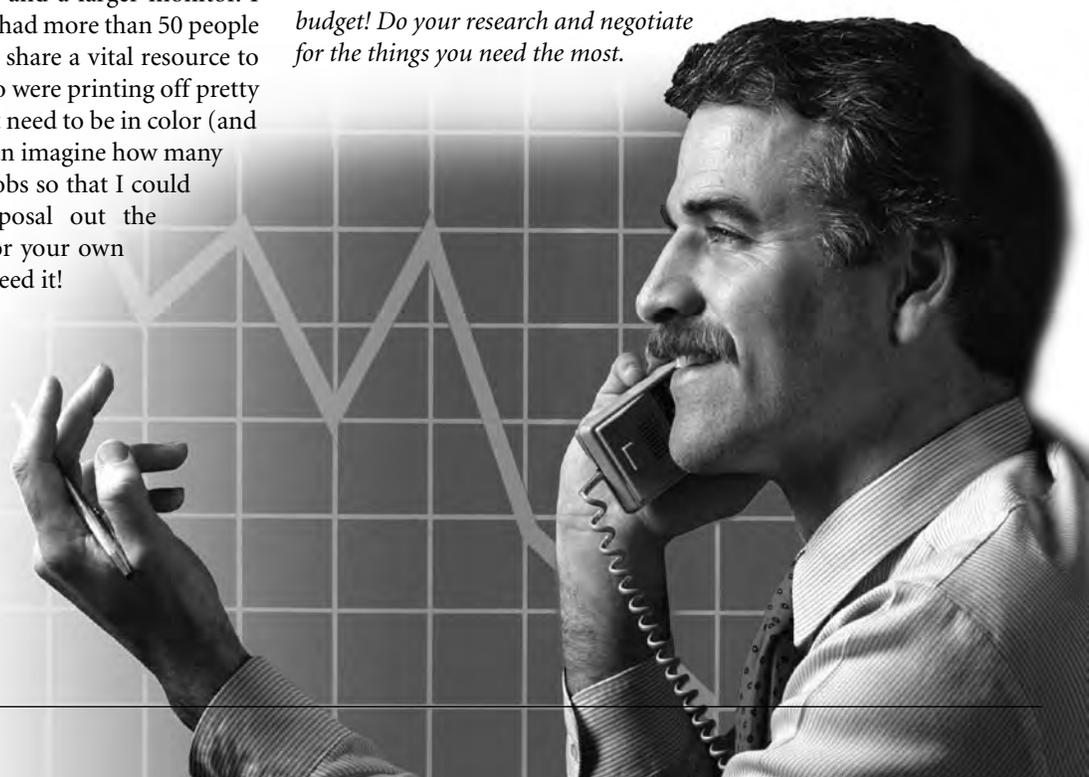
Step Ten: Present Your Business Plan

At this point, you are ready to present your Business Plan. I suggest you provide a written Business Plan in a binder with all the details and back-up data, but actually present your plan in a PowerPoint presentation to the appropriate people. Work with your boss to determine who should be present at your presentation. It is also a good idea to think of possible questions ahead of time so you are prepared with well thought-out answers.

Time to Set up Shop

You have done your homework and your Business Plan gets approved (hopefully with everything you wanted or minor adjustments only). Now it is time to start setting up your department!

You cannot write a Business Plan without a budget! Do your research and negotiate for the things you need the most.



Physical Location

I know that many companies have limited office space, but you will need some dedicated space. The best scenario to bargain for is one area where your whole team can be together. This will help build camaraderie, as well as make you all more efficient. You will also need the proper space to set up your equipment (printers, faxes, copy machines.) Another important area is your production area. You should get a table/shelf system that is at an ergonomically correct height, with a nice comfortable mat for standing.



Plan early the most efficient way to use your physical location space. Don't forget to leave room for production!

Next, we group the Q&As into categories and subcategories, and enter them into the database. I have always found that it is easier to let the content “fall into place” than to try and design a directory first. But everyone is different – you may feel it best to start with a directory, and then fit the Q&As you come across into your pre-existing directory.

For almost every Q&A, we rewrite the answer so that it has a value proposition (something that seems to always be missing). We also rewrite each answer with a similar tone and feel so that it seems like all the answers are coming from one source. Depending on how many Q&As you are dealing with, this can be a formidable task, so allow yourself plenty of time to do this.

Every time you cannot answer a question in an RFP, log it, and when you get the response from the SME, enter the new Q&A into your database.

Within the database, we then assign an SME to each Q&A. After we have an appropriate number of Q&As entered, (your number will depend on your company and how many RFPs are done per year), we then send these out to the SMEs for corrections and updates. Your software package will help you with this task. After the SMEs' input is returned, the database administrator makes the corrections in the database.

The database is now ready to respond to RFPs. Once you start responding to RFPs, you want to continue to

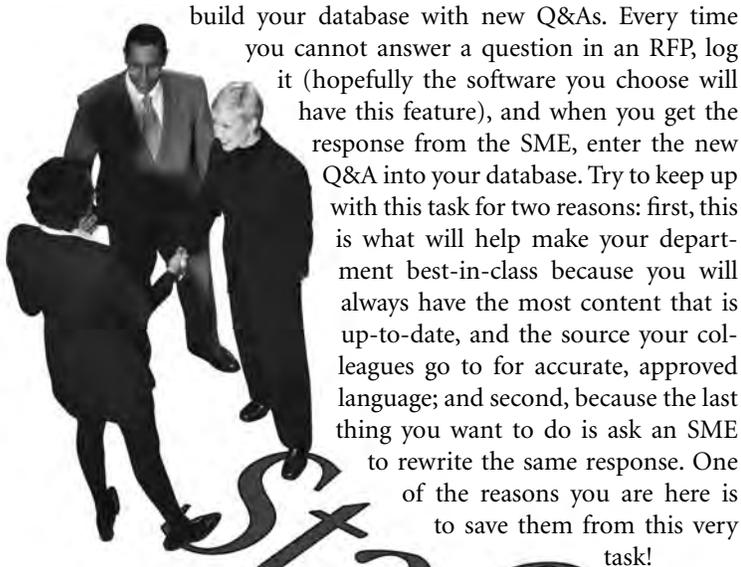
Make sure to look for people that seem easy to get along with. You are working in a pressure-filled, time-sensitive occupation. It is nice to share some laughs while you work.

Hire Your Staff

When the time comes to start building your staff, hopefully you will have some internal people who already know your business transition into the roles you designed. This is almost always an easier path. However, if you must go outside the company to hire your staff, work with your Human Resources department as soon as possible. I have always found the hoops that HR requires us to jump through quite time consuming. Job requisitions, internal “grading” of roles, will eat up a lot of your time so get started as early as possible. Once you have narrowed your search to a few candidates, make sure to look for people that seem easy to get along with. You are working in a pressure-filled, time-sensitive occupation. It is nice to share some laughs while you work.

How to Start Your Database

Once your staff is in place, it is time to start building your database of Q&As (questions and answers). Each person may do this a little bit differently, but for the departments that I have created, I started by requesting electronic copies of what people considered the best RFP responses done within the past year. My team then breaks each of these RFPs down into individual Q&As.



build your database with new Q&As. Every time you cannot answer a question in an RFP, log it (hopefully the software you choose will have this feature), and when you get the response from the SME, enter the new Q&A into your database. Try to keep up with this task for two reasons: first, this is what will help make your department best-in-class because you will always have the most content that is up-to-date, and the source your colleagues go to for accurate, approved language; and second, because the last thing you want to do is ask an SME to rewrite the same response. One of the reasons you are here is to save them from this very task!

Finding the perfect staff is time consuming. Start early and make sure to hire someone you would enjoy working with.

Create a Template

After the RFP response software purchase, creating a template is the next thing to do to save time. Your template should have the “look” your company wants and be designed to easily format your documents. Take the time to do this in the beginning; it will save you hours later. If you do not know how to create templates, you can either send someone on your team to training, or hire an outside resource to do this for you.

Be sure to have your team follow a style guide. This saves time for everyone because there will be a resource to go to – it also allows multiple writers to maintain consistent style standards.

Write a Style Guide

Be sure to have your team follow a style guide (*Chicago Manual* is one of the better ones). You should also write an internal style guide for the proper way to refer to your company, and your registered product names. This saves time for everyone because there will be a resource to go to for questions. It also allows multiple writers to maintain consistent style standards you want in place.

A proposal is similar to any other document—it must maintain your company’s branding and present your company in the most professional manner possible.

Maintain Branding Consistency

A proposal is similar to any other document leaving the company — it must maintain your company’s branding principles, correctly use your logos, and present your company in the most professional manner possible. You must not have typos, inconsistent messages, or inaccurate information. Be sure to clearly understand how your company wants you to project its image. A conversation or two with the branding/marketing manager is an essential step when creating your department.

Build an Executive Summary and Cover Letter Library

I suggest you start developing a good library of executive summaries and cover letters from the start. Along with the proposals, we all know that each executive summary and cover letter must be custom written. However, it always helps to start these with a nice skeleton. I like to have different executive summaries and cover letters by industry, products, and audiences (CFO, CEO, and procurement). I suggest you store these samples right in your database, along with the Q&As.

Get the Word Out

Before you open your doors for business, have an open house. If possible, invite the whole company. Give demonstrations of your new software, show off your collating/production area, and introduce your staff members to everyone. The more exposure you have, the better off you will be. You and your teammates will be in demand very quickly and will become indispensable to your company.

At one of the most successful Proposal Services departments I ever managed, I gave a presentation specifically designed just for the SMEs. I included a demonstration of the software I used, explained how the Q&A process would work, what I expected of them, and what they could expect of me. Most importantly, I provided them with pizza, soft drinks and cake. At the end of the year, I threw a party with some awards and prizes: most Q&As assigned to one person; most timely; and even a most untimely — the prize was a watch with scrambled numbers! (This person had a great sense of humor.)



BRAND X

Your company's brand must be consistent across all marketing materials, including proposals.

Other Considerations

Timelines, And How Come Nobody Follows Them?

The failure to follow a timeline is one of my biggest pet peeves. People who do not follow a well-constructed and thought-out timeline have to be pretty arrogant to think their time is more important than every other person on the team. I once worked for a company where my team was very small and we only responded to a fraction of the RFPs that the company received. Unfortunately, the company was also pretty lax about timelines — upper management did not make them a big issue. I kept harping that the timelines had to be followed but the right people weren't listening. Then one day, believe it or not, one of the teams (not my team, thank goodness!) actually missed a client's RFP deadline (didn't think this ever happened, huh?) and were told by the client they were disqualified. It was a potentially very large piece of business to lose. Guess what? Upper management started getting the message out that the timelines were to be followed by everyone. Better late than never.

Timelines are vital in a Proposal Services department — remember you will always be at the end of the line for every single project.

I have found the best way to get everyone to meet timelines is to be sure everyone understands how one missed deadline impacts everything else — not just a single RFP. If you are running a Proposal Services department, you need to have everyone meet their timelines on all the different projects. One missed deadline can affect someone else's project if you suddenly have double the workload you thought you had scheduled evenly.

I always try to be flexible if someone cannot meet a deadline, but if the timeline just does not allow for missed deadlines, I let the person know. Timelines are vital in a Proposal Services department — remember, *you will always be at the end of the line for every single project*. Neither you nor your team should be expected to work late all the time, and the failure to have upper management enforce timeline adherence is usually the cause of burnout and high turnover rates in proposal departments. Get buy-in from upper management on this issue *before* you open for business. To review a sample timeline, please refer to Figure 3.

July						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	RFP Delivered to appropriate staff	7	8	Initial RFP strategy meeting	9	10
					First draft to SMEs by noon	11
12						12
13		14		16	Sales 2nd draft corrections due to PW	17
					PW enters corrections and sends final draft to Sales	18
						19
20	Sales approval due by noon	21	22	23	24	25
	Proposal coordinator prints, binds, and ships					26
27		28	29	- SAMPLE - Three-Week Turnaround		

Figure 3. Sample Timeline.

Q&A Process

Not a fancy name, but it is what I call my process of sending out Q&As for review/corrections to the SMEs. The RFP response software will help you immensely with this task. As I mentioned before, having software that marks each record (Q&A) with the SME and the review date is vital to making this work smoothly.

Send each SME an individual report with just their own Q&As. Ask them to use the Microsoft tracking feature (give them quick directions on how to turn this on). This is important because you do not want to just blindly accept their changes. Because not every SME is a great writer, you want to control the content and make sure it follows your own style guide.

Always allow the SME to decide each Q&A's review frequency (how often they want to review it). Many SMEs will start out indicating they want to review all their

Q&As quarterly. After the third quarter at this they realize just how quickly the next quarter comes, and many will change the frequency on some Q&As. For instance, is your company history really going to change every three months? Highly unlikely. It is probably better that this type of question get reviewed yearly. But some of the technical questions for IT change quite frequently, so quarterly is appropriate. I always let the SME determine how frequently each Q&A needs to be reviewed.

My team uses a tracking sheet every time we send out Q&As for review. We keep track of the date sent, the due date, and the date we received them back from each SME. We also include a column for comments (e.g., “so-and-so out on vacation”). Tracking all this information helps us keep things straight on who owes us what and when, and provides the documentation needed when reminding SMEs they are running late with their Q&As.

Finally, a little incentive may go a long way. At one company, I had a contest where I offered to put the name of everyone who sent their Q&As in on time into a bowl, and to randomly choose two winners. These two winners received a small monetary reward. This incentive (\$25 for each winner) was a small price the company paid to have more efficiently done RFP responses, and more accurate information sent out to clients. Whenever I feel too many SMEs are getting lax in their timeliness, I do this type of contest to reinvigorate things.

By following at least some of these suggestions, you can create and manage a world-class Proposal Services department!

Resources for Further Development

There are thousands of books and articles on writing successful proposals, and included in those publications are tips on creating successful response teams for various types of proposals. Actual information on creating a successful department is much harder to find.

However, additional valuable information on creating a Proposal Services department can be gleaned from colleagues in the business. Several organizations that sell proposal development software have users' sites or



Information on how to improve your processes is everywhere. Look to books, newsletters, colleagues and other trusted resources for new learning opportunities.

forums, such as Pragmatech (www.pragmatech.com) or have newsletters, such as Sant Corporation (www.santcorp.com). By belonging to these types of listservs you can ask questions and get ideas from other people in the business. In addition, there are other organizations that can also provide insight through newsletters and their Websites including Organizational Communications, Inc. (www.orgcom.com) and Ventaso (www.ventas.com).

Hopefully, by following at least some of these suggestions, you can create and manage a world-class Proposal Services department. Best of luck!

Joan Bettinger has set up and managed Proposal Services departments for several large companies, including a Fortune 100 company. She is currently the proposal services manager at Carlson Marketing Group in Minneapolis, MN. She can be reached at jmbettinger@msn.com. She is the recipient of the 2004 Pragmatech Leaders Award for Efficiency and Excellence in RFP Responses.

Proposal Departments: *Whether to Use Permanent Staff or Consultants*



By Russell Smith*

**20-year proposal professional & President of Organizational Communications Incorporated (OCI), a business development and proposal management consulting firm*

Every company that creates proposals faces the question: do we use permanent staff or do we outsource the proposal function by using consultants? This question is especially important to government contractors, because a large and expensive effort is usually required to prepare winning proposals. The issue is how best to invest Bid & Proposal (B&P) dollars.

During the past 20 years in the proposal business, I have seen many companies facing decisions about investing their B&P dollars. Their solutions have ranged from keeping proposal preparation totally in-house to outsourcing the entire proposal preparation process. Most companies fall between these two extremes and use a mix of in-house staff and consultants. In these situations, the issue revolves around the most cost-effective mix of staff and proposal consultants.

The following factors can help you decide what is best for your company:

1. How large are the business development goals?
2. How even is the flow of incoming, biddable RFPs?
3. What is the availability of in-house personnel with the skills needed on the proposal teams?
4. How does the cost of the in-house personnel compare to the cost of consultant personnel?

Very few firms experience an even flow of proposal activity, and the more common situation is to have peaks and valleys in the workload.

Business Development Goals

It comes as no surprise that the more aggressive the business development goals are, the greater the need to outsource. If a company has large growth goals — say 40-50 percent or more — it is usually not possible to handle the workload successfully by staffing up internally. At least, not in the short run. Conversely, companies with more modest development goals have a better chance of meeting goals with in-house staffing.

Assume that the goal is to develop \$40M in new business during the next year. Let us further assume that we have a 50 percent win rate and that we usually bid on contracts either in the \$5-\$10M range or in the \$20-\$30M range. Then simple arithmetic tells us how many bids we will need to prepare, and our recent experience helps us estimate the quantity of skills and hours needed to get the work done.

Evenness of Proposal Flow

Although business development goals help define the quantity of efforts needed to get the bids prepared, the granularity of the bids is even more important in determining how much proposal work the company will outsource and how much they will keep in-house. A company bidding a large number of smaller contracts may be able to spread the effort so that they can handle all of



Typically, firms augment their in-house resources with outside consultants.

their proposals in-house. In contrast, a company bidding a few large programs, with gaps of inactivity between bids, can usually get the work done more economically using proposal consultants. And remember, it is not just about how much it costs — you have to generate winning proposals, too.

My experience has been that very few firms experience an even flow of proposal activity, and the more common situation is to have peaks and valleys in the workload. Usually the only firms experiencing an even flow in workload are those that submit a large number of proposals for relatively small contracts. For companies bidding on large contracts, life in the proposal shop is typically a constant round of peaks and valleys.

Given the uncertainty of RFP releases, it is impossible to predict the timing of proposal efforts.

For many companies, the issue of whether to outsource or not and, if so, how much, is not clear-cut. Given the uncertainty of RFP releases, for example, it is impossible to predict the timing of proposal efforts. Consequently, good luck in the release schedules may mean an evenly spaced workload that the in-house staff can handle well. However, when too many bids stack up at the same time, due to simultaneous due dates, the only solution may be to outsource.

Availability of Skills Needed for the Proposals

Most firms maintain a group of full-time proposal process professionals. Typically, they augment the proposal staff with technical talent drawn from other in-house groups, as needed, to develop any technical content. Then, they augment the need for proposal process or technical personnel with consultants when the in-house resources are exhausted. The proposal process personnel typically include proposal managers, technical writers, coordinators, desktop publishers, pricing staff, and the like. Those assisting with technical proposals often are system engineers, network engineers, and other similar personnel and are matrixed to a proposal effort as needed. The outside consultants can include proposal process personnel, technical personnel, or assorted specialists.

Proposal consulting groups can frequently provide the best available solution to companies needing additional talent or specialty talent.

The more manageable problem for the proposal group is that of assigning the proposal process talent, because those personnel are usually under the direct control of the proposal group manager. The more difficult problem is the technical talent needed for the solution. These personnel often have conflicting loyalties. For example, they are frequently directly billable personnel working on a Government site during the day. Consequently, they contribute to the proposal, in worst-case situations, after hours — during the evenings and on weekends. A somewhat better situation is when the technical solution talent is just matrixed to multiple proposals, but supports the proposal work during normal business hours.

Proposal consulting groups can frequently provide the best available solution to companies needing additional talent or specialty talent. Nearly all proposal consulting firms have a ready source of proposal talent such as proposal managers, desktop publishers, pricing person-

Worst-case use of existing staff can leave your team too tired to add value to your proposal effort.



nel, and technical writers that can be provided with one or two days lead time. Some consulting firms with large numbers of consultants can readily provide highly focused specialists, such as an expert in a system, an agency, a process, or a program, given a week or so of lead time.

Relative Cost of In-House Personnel vs. Consultants

The question of the relative costs of in-house personnel and consultants is complex and challenging to answer. It has been my experience that even high-level decision-makers in large business firms often do not understand this question. For example, the cost to employ a full-time staff member must take into account the total cost to employ, which includes not only salary and fringe benefits, but also such variables as the cost of downtime on the job and the cost to replace employees. Likewise, the cost of using consultants must take into consideration the fact that the consultant does not arrive with a depth of knowledge on the company.

Using employee overtime in proposal preparation helps keep costs down in the short run.

Relative Cost of In-House Personnel vs. Consultants

Some of the cost advantages of using consultants to prepare the proposals are as follows:

- The company can bring in the consultant on an as-needed basis and then release him or her when the task is done with no loss of productivity due to downtime.
- The company can obtain highly specialized marketing or technical talent from consulting firms without having to incur an inordinate overhead cost.
- The company can readily expand and contract the proposal teams, as needed to meet typical peak and valley situations for an affordable price.
- The company can get a more precise match between personnel skills and task requirements than would ever be possible using only in-house talent.

Typical cost advantages of using in-house personnel to prepare proposals include:

- The skills developed in preparing the proposal enrich the company by staying in-house rather than leaving the company when the consultant departs.
- Usually there is no learning curve required for the employee to come up to speed on knowledge of how the company does business.
- The possibility of proprietary information leakage is lower.
- The capability to use employee overtime in proposal preparation helps keep the costs down, at least in the short run.

During my career, I have been in a position to see how scores of companies manage their proposal operations. Based on that experience, I can offer a few guidelines.

Largely Permanent Staff Solutions

The following situations make it advantageous for a company to use permanent staff for proposal development:

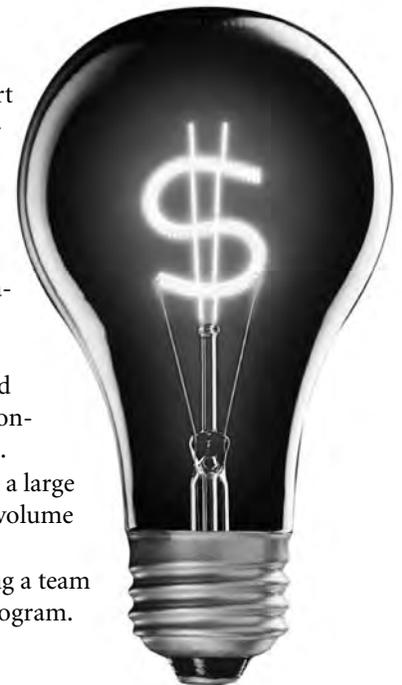
- Bids are highly granular, and it is easy to maintain a steady-state proposal preparation operation.
- The company has valuable trade secrets that might be compromised by using consultants.
- Business development goals are modest and the traditional in-house approach is satisfactory.

The problem of selecting the most effective proposal group is critical – the optimal selection of a proposal consulting group can make a real impact on the company's bottom line.

Largely Outsourced Solutions

The following situations support the outsourced approach to staffing the proposal operation:

- The company typically bids substantial programs, producing a peak-and-valley workload in proposal preparation.
- The company is bidding programs in which the specialized expertise needed to win the contract is not available in-house.
- The company wishes to make a large and dramatic increase in the volume of contract wins.
- Several companies are forming a team to bid a large and complex program.



Having a clear idea of your business development goals can help decide whether outsourcing is right for your company.

Selecting the Best Proposal Consultant Group

The problem of selecting the most effective proposal group is critical, considering the costs involved and the possibility of gaining a competitive advantage to win more contracts. The optimal selection of a proposal-consulting group can make a real impact on the company's bottom line through increased contract wins for an affordable price. Some of the factors involved in making the most effective selection include those mentioned in the list at right.

The question as to how much and what proposal service to outsource and what to keep in-house is a never-ending problem.



Proposal consulting groups can really impact a company's bottom line through increased contract wins for an affordable price.

Things to Look for When Hiring a Proposal Consulting Group or Individual

- **Quality** – The consultant group selected needs to have an excellent track record in providing the desired service, whether that service is a coordinator to work for a month or a proposal team of 20 to prepare the winning bid for a telecommunications program.
- **Cost** – The consultant group should be able to deliver the desired service for a price that is competitive.
- **Depth** – The consultant group needs to have a sufficient quantity of qualified personnel in the skill categories needed to meet the anticipated requirements.
- **Reputation** – The consultant group should have a demonstrated record of providing responsible service and solving problems as necessary to complete tasks like the customer needs in accordance with expectations.
- **Process** – The consultant group must have the capability to either use the customer's proposal preparation process or to provide a proposal preparation process that is sufficiently robust and repeatable to handle the anticipated work assignments.
- **Name Brand** – Some firms feel most comfortable in selecting a proposal consultant group with a well-known national name, and they usually pay a premium of 30-40 percent over the cost of a local firm for the prestige of the brand name.
- **Personality** – Service delivery works best when the company has succeeded in selecting a consultant group that is not only technically qualified, but that also has a corporate culture and personnel who are highly compatible with the customer's own culture and personnel.

Conclusion

The question as to how much and what proposal service to outsource and what to keep in-house is a never-ending problem. It sometimes seems that if a company has been doing proposals in-house for the past five years, they will be outsourcing the next five years, and vice versa. Although some situations are clear-cut, making a decision is often as much of an art as a science, and it depends heavily on a company's business development strategy. Since simplification in contracting, most companies have moved more toward the outsourcing solution.

Companies may be able to grow faster and achieve greater profits by using outside assistance to bid and win additional programs.

However, nearly all the federal bidders we have seen maintain some type of permanent proposal staff. In the case of those firms bidding large opportunities very infrequently, the permanent staff may be just a part-time coordinator. A more common behavior is for a firm to maintain at least the staff needed to pursue one proposal at any given time. This typically includes, at a minimum, a proposal manager, technical writer, editor, and combined coordinator/desktop publisher/graphic artist. A few robust divisions of larger firms still maintain large departments with 30 or 40 or more permanent personnel.

I have had some prospects that outsourced very little proposal work. They chose NOT to outsource, because they believed they could achieve their goals with only permanent staff. I believe that many of those companies could have grown faster and could have achieved greater profits by using outside assistance to bid, and win, additional programs.



*Permanent staff vs. consultants
– find your winning combination!*

Russell Smith, a 20-year proposal professional, is President of Organizational Communications Incorporated (OCI), a business development and proposal management consulting firm located outside Washington, DC. Over the last ten years, his clients have won more than \$50 billion of contracts with a win rate of 83 percent. Mr. Smith's firm specializes in providing proposal consultants, proposal teams, and training for proposal professionals. He also serves as Vice President of the National Capital Area Chapter of APMP. You can contact him at rsmith@orgcom.com.

Resources for Women Proposal Professionals



By Colleen Jolly

Organizations devoted to promoting and enhancing women's careers are more numerous now than ever before. Many professional women's organizations span career paths from engineering to homemaking; however, no singular group addresses the diverse jobs held by women in the proposal industry. Women who work on proposals must possess a unique skill set that often bridges many disciplines — management, writing, graphic design — that are difficult to cover in a single association.

The following pages detail technology, engineering, entrepreneurship, leadership, and management organizations, including groups for women who work with the government. The list is separated into women's associations located in the Washington, DC, metropolitan area and nationally, with consideration given to groups that sponsor events, workshops, and networking opportunities. The description of each organization includes their Website, structure, location,

membership dues, benefits, and rules on the participation of men. A separate section on business resources is located at the end of the list.

The following is by no means an exhaustive catalog of professional women's organizations that may be of interest to women proposal professionals. Think of it as a starting point to expand your career network and knowledge base.

WASHINGTON, DC METROPOLITAN AREA

Women in Technology (WIT)

<http://www.womenintechnology.org>

Women in Technology was founded in 1994 to provide women in the technology industry (and those industries that support technology) located in the Washington, DC area with a “networking and professional growth environment to develop relationships and create new opportunities.”

WIT sponsors monthly programs comprised of both education and networking opportunities and maintains four special interest groups tailored to specific interests: Executive Women, Women Business Owners, Information Technology, and Sales & Marketing, as well as 11 different committees that provide women-targeted involvement and opportunities. WIT has a strong volunteer and education base and offers a formal Mentor/Protégé program biannually, supports young women’s interest in technology careers through Girls in Technology (GIT), and rewards outstanding women through their annual Leadership Awards Banquet.

LOCATION: WIT is located in Alexandria, VA, and events are sponsored in different locations in the Washington, DC area.

DUES: \$95/year individual, plus fees for events.

BENEFITS: Access to listserv job posts and member’s only job bank, bimonthly newsletter, discounts to events, access special cosponsored events, and networking luncheons.

MEN ALLOWED?: Yes.

The Women’s Center

<http://www.thewomenscenter.org>

The Women’s Center was founded in 1974 to offer “counseling, education, and information resources that provide psychological, career, financial, and legal services to women and families regardless of ability to pay.”

The Center offers a variety of personal growth and professional group opportunities and workshops (listed on their Website). Its popular Women’s Leadership Conference, which draws diverse speakers and attendees (both male and female), is held annually in the spring.

LOCATION: The Center is located in Vienna, VA, with many resources offered on site and others offered in different locations in the Washington, DC metro area.

DUES: \$30/year basic membership (tax deductible), plus fees for events (sliding scale for more benefits, volunteer opportunities, and general contributions).

BENEFITS: Includes all Center publications and news alerts, program calendars, and discounts to Center programs like the Annual Leadership Conference, and access to the Information Career Advisory Network (ICAN).

MEN ALLOWED?: Yes.

National Women’s Business Center (NWBC)

<http://www.wbiznet.biz>

The National Women’s Business Center targets women entrepreneurs, business owners, and potential business owners. NWBC offers training and support at reasonable prices mostly at their downtown Washington, DC, office. Its mission “is to be the premiere provider of training in the national capital area for women who want to start or expand their own business.”

NWBC provides training and networking specifically for disadvantaged and/or minority women and offers informal mentoring partnerships.

LOCATION: NWBC is located in downtown Washington, DC, and most events are held on site.

DUES: Variable, check the Website for details. NWBC also accepts donations.

BENEFITS: Discount on NWBC training programs, your company listed on the NWBC’s Website, access to the membership database, monthly “Members Only” networking reception, bimonthly newsletter, and business opportunity referrals.

MEN ALLOWED?: Yes/Not Specified.

WASHINGTON, DC METROPOLITAN AREA

DC Web Women

<http://www.dcwebwomen.org>

DC Web Women, formed in 1999, is primarily a virtual organization that utilizes different user-subscribed lists to communicate with its members. DC Web Women also provides networking and training events for technology learning, specifically targeting new media (mostly online applications, programming languages) as well as social events and volunteer opportunities.

LOCATION: Their mailing location is in Springfield, VA. Mostly virtual.

DUES: Free.

BENEFITS: Access to the minds and e-mail boxes of other women in technology, member-only résumé posting, technology how-to resources, and specifically targeted forums.

MEN ALLOWED?: No.

Junior League of Washington (JLW)

<http://www.jlw.org>

The Junior League of Washington, founded in 1912 as an offshoot of the original Junior League pioneered by Eleanor Roosevelt (among others) in New York, was originally a response to a greater interest in social issues at the turn of the century. The mission of the JLW is to promote volunteerism, leadership, and community improvement through women working toward common goals. JLW works with a variety of organizations including museums and battered women shelters. Membership requires specific amounts of community service and involvement based on years of commitment.

LOCATION: JLW is located in Washington, DC, with events throughout the Washington, DC, metro area. There are leagues in other cities (such as New York) with similar structure, requirements, and opportunities.

DUES: Variable, based on amount of years involved. Volunteer hours and donations are required in addition to monetary dues for membership.

BENEFITS: Some training and networking but mostly volunteer and fundraising opportunities to improve the local community.

MEN ALLOWED?: Membership is open only for women at least 20 years of age who reside in the Washington, DC, area. There is an application and mentoring process for membership.

NATIONAL AREA

National Association of Women Business Owners (NAWBO)

<http://www.nawbo.org>

The National Association of Women Business Owners began in 1975 as a place for concerned Washington, DC metro area women business owners to discuss various issues from management to hiring to competing for government contracts. NAWBO has evolved into a nationwide organization promoting business ownership with ties to international women's entrepreneurial groups. NAWBO promotes and supports women entrepreneurs in all types of business and at all stages of business.

LOCATION: NAWBO is located in Northern Virginia with regional chapters across the country and alliances in 35 countries.

DUES: Variable, starting from \$50/per year plus individual chapter fees.

BENEFITS: National conferences, access to public advocacy groups, publications, networking and training events, speaking events, and discounts for various services and products through corporate affiliations.

MEN ALLOWED?: Membership is "restricted to sole proprietors, partners, and corporate owners with day-to-day management responsibility." The participation of men is not specified.



NATIONAL AREA

Society of Women Engineers (SWE)

<http://www.swe.org>

The Society of Women Engineers was founded in 1950 to educate and inform women (and their parents, educators, and the public) about engineering opportunities for and successes achieved by women. SWE acts as an information space for women engineers (and those seeking to become engineers), a volunteer opportunity to help girls enter technology careers, and a networking/support group for women engineers in all stages of their careers.

SWE offers training, networking events, annual conferences, award-winning publications, support, and volunteer opportunities for women in engineering careers/industries.

LOCATION: Headquartered in Chicago with regional offices located throughout the country.

DUES: Variable from \$20 – \$120 depending on career level.

BENEFITS: Encouraging girls to pursue careers in engineering through guidance programs, networking opportunities, scholarship programs, regional and national conferences, discounts to events, SWE Magazine, seminars/workshops, awards and recognition programs, career services, and volunteerism.

MEN ALLOWED?: SWE is focused on women engineers. The participation of men is not specified.

Women in Technology International (WITI)

<http://www.witi.org>

Women in Technology International was founded in 1989 as the first organization to promote and support women worldwide in all aspects (corporate, human resources, IT, and sales) of the technology industry. WITI supports women in every stage of their careers through training (regional and tele/virtual), regional networking events (across the country and around the world), corporate partnerships/strategic alliances, influencing public opinion and top leaders in government, and empowering programs for young women in America and abroad.

LOCATION: Regional networks are across the United States and in Australia, Canada, China, Ireland, Mexico, Spain, and the United Kingdom.

DUES: \$150/year, plus fees for events.

BENEFITS: Job networking/posting, regional networking events, regional/national conferences and events, access to over 2 million members, online discussion boards, speaking/writing engagements, strategic partnerships with Women Impacting Public Policy and Human Capital Group organizations, and business solutions such as Web hosting and business financial assistance.

MEN ALLOWED?: Men are encouraged to join.

The Association for Women in Communications (AWC)

<http://www.womcom.org>

The Association for Women in Communications began as a women's journalism society called Theta Sigma Phi at the University of Washington in Seattle in 1909 and matured into its current state in the mid-1990s. AWC is dedicated to the advancement of all communicators including journalists, graphic designers, public relations specialists, advertisers, marketers, et al., through networking, public policy initiatives, and university level support. Throughout its history, AWC has had periods of intense political action and continues to promote First Amendment freedoms.

LOCATION: Regional chapters are located across the country and internationally.

DUES: Variable, depending on region and job function/category.

BENEFIT: Networking opportunities, national conferences, publications, job postings and career assistance, leadership and personal growth materials, scholarships and awards/recognition programs, and discounts to a wide range of services and products.



OTHER RESOURCES

Center for Women’s Business Research

<http://www.womenbusinessresearch.org>

This Website contains every statistic you could possibly want or need regarding women in business. The information is logically organized, and the Website is easy to navigate.

LOCATION: Their office is located in Washington, DC, and most information is accessible virtually.

DUES: N/A. Some studies/articles are for purchase, and donations are welcome.

MEN ALLOWED?: N/A.

National Women’s Business Council

<http://www.nwbc.gov>

The National Women’s Business Council is a federal advisory council that conducts research regarding the economic concerns of women business owners and provides recommendations to the President, Congress, and the Small Business Administration. The Center also disseminates pertinent information publicly and supports women business owners. Made possible by the passing of the Women’s Business Ownership Act, the Council was formed in 1988 as a reaction to continuing strides for equality in all women-owned businesses. The 15-member council is comprised entirely of women business owners and leaders from around the country. The President appoints the Council Chair. Four members of the Council must be small business owners of the same party as the President, four members must also be small business owners not of the same party as the President, and six must be representatives of women’s business organizations (with party affiliation unspecified).

LOCATION: The Center is located in Washington, DC, and most information is accessible virtually.

DUES: N/A.

BENEFITS: Information for, about, and by women.

MEN ALLOWED?: N/A.

WomenBiz.gov (Provided by the National Women’s Business Council)

<http://www.womenbiz.gov>

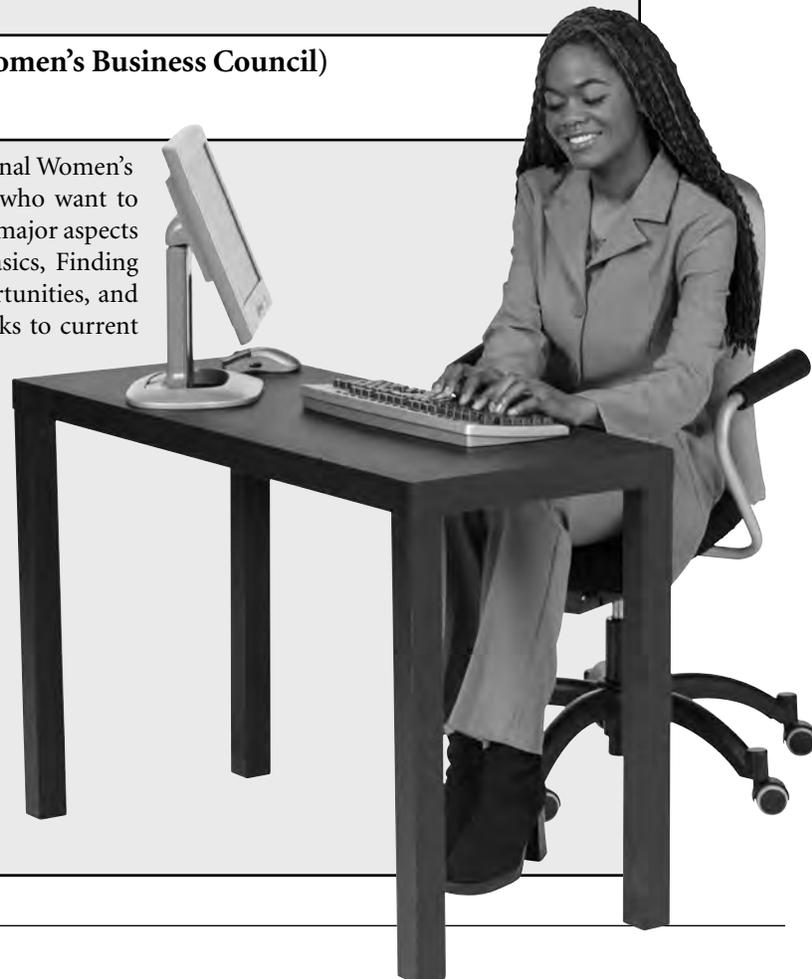
WomenBiz.gov is a Web portal designed by the National Women’s Business Council to provide information for women who want to work with the government. The site is divided into five major aspects of the business development process: Meeting the Basics, Finding your Market, Getting Started, Finding Business Opportunities, and Key Contacts. It includes helpful information and links to current information regarding the federal procurement process and to external government agencies.

LOCATION: Virtual.

DUES: N/A.

BENEFITS: A comprehensive, easy-to-use Website for women business owners doing business with the government.

MEN ALLOWED?: No, government support is for majority women-owned business. Men can take advantage of some basic online information.



OTHER RESOURCES

United States Small Business Administration (SBA) Office of Women's Business Ownership
<http://www.sba.gov/financing/special/women.html>
and the SBA Online Women's Business Center
<http://www.onlinewbc.gov>

Government-run Small Business Administration Web portal for women business owners and those seeking to work with the government. The portal includes job postings, loan information, message boards, training opportunities, business basics, and links to other women networking/support organizations. The portal is offered in English, Spanish, Arabic, Russian, Chinese, Japanese, and Icelandic.

LOCATION: Virtual with headquarters in Washington, DC, and regional offices located throughout the country and some territories.

DUES: N/A.

BENEFITS: One-stop government information portal for most new and existing business owner issues.

MEN ALLOWED?: No, government support is for majority women-owned business. Men can take advantage of some basic online information.



*Women Proposal Professionals
 come in all shapes and sizes – so
 should their associations!*

Colleen Jolly is a Principal at 24 Hour Company, a professional proposal graphic and production company in Falls Church, VA. Ms. Jolly is also responsible for Book Composition and Cover Design for Proposal Management. She can be contacted at colleen@24hrco.com.

Brunelleschi's Dome: How a Renaissance Genius Reinvented Architecture

By Ross King

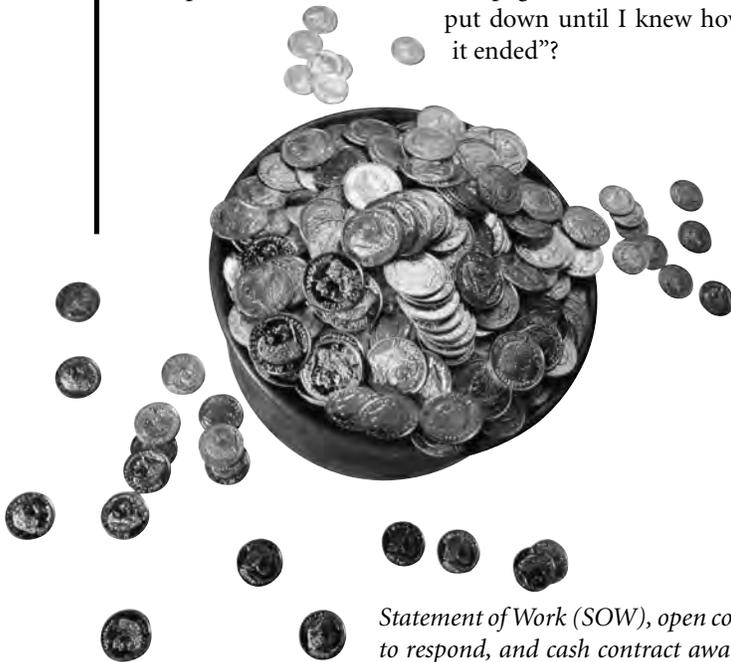
Publisher: Penguin Books, New York, New York, 2000, Retail Price: \$13.00

Reviewed by

David L. Winton, Executive Director, Association of Proposal Management Professionals

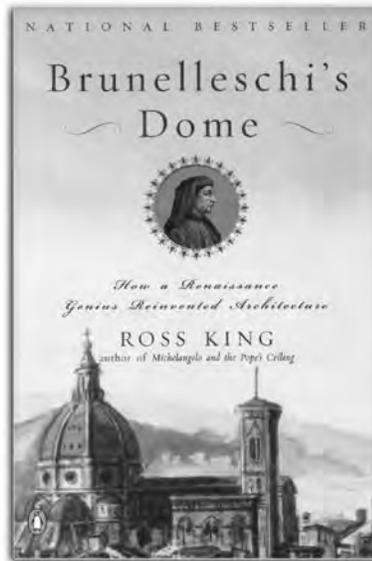
Reading for pleasure has become a lost art in this day and age. A recent article in the *New York Times* commented that overall readership was down. Growing up, there were always teachers, friends, and family members who would ask, "Have you read this? You really should." With the usual nod and smile, I would say, "not yet, but I will; as soon as I get a chance, I will." What with just trying to keep up with work-related material and an occasional self-help book, or the latest diet, my reading for pleasure has become nearly extinct.

When was the last you heard someone say, "I spent the weekend snuggled up in front of a roaring fire with a cup of hot chocolate and a 167-page RFP that I couldn't put down until I knew how it ended"?



Statement of Work (SOW), open competition, six weeks to respond, and cash contract award; this was starting to sound familiar!

Guess what? I finally found one. *Brunelleschi's Dome* by Ross King is just that. From the opening paragraph, I was hooked. What I didn't expect was how filled with a sense of pride I felt, being a proposal professional who had for



many years conducted training classes, led sessions on storyboarding, been on pink teams, red teams, gold teams, and had even written sections on past performance.

By the time you have been doing this for close to 20 years, you get tired of hearing the same examples, the anecdotes, and war stories, and you are no longer sure are they fact or fiction.

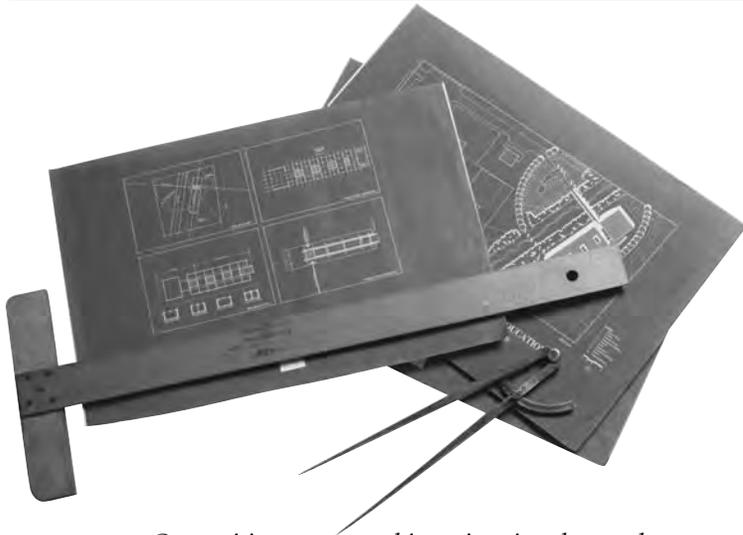
Well, if you are in search of some examples, help has arrived.

Brunelleschi's Dome is a proposal trainer's dream and an engineer's delight. The story is set in fifteenth-century Florence, where neighboring cities were at war, the plague was raging across Europe, the usual fighting was going on between Church and State and between Engineer and Artist, with a little larceny thrown in to boot.

I spent the weekend snuggled up with a 167-page RFP that I couldn't put down until I knew how it ended.

Chapter I — A More Beautiful and Honourable Temple — opens with the following announcement on August 19, 1418:

*The opinions expressed in these reviews are those of the reviewers and do not necessarily represent the views of APMP. New book reviewers and book review recommendations are always welcome. Please send your recommendations or comments to Managing Editor John Elder at jelder@caci.com.



Competition among architects is a time-honored custom.

“Whoever desires to make any model or design for the vaulting of the main Dome of the Cathedral under construction by the Opera del Duomo—for armature, scaffold, or other thing, or any lifting device pertaining to the construction and perfection of said cupola or vault—shall do so before the end of the month of September. If the model be used, he shall be entitled to payment of 200 gold Florins.”

You have barely had a chance to take your first sip of hot chocolate and you find yourself searching for a highlighter or a pen to make notes in the margins — Statement of Work (SOW), open competition, six weeks to respond, and cash contract award. You think to yourself, this sounds pretty easy with an SOW written in less than 100 words. Like most RFPs, there has to be a reason for this open competition.

The reader quickly finds out that the competition is to build the dome for the new cathedral, Santa Maria del Fiore, where construction had been going on for more than a century. The foundation stone for the cathedral had been laid in 1296.

Among the many challenges to build the new dome was that responsibility for funding and building the cathedral was under the control of the Wool Merchants, the most powerful guild in Florence. Their problem was they did not know anything about building churches or architecture.

Less than eight pages into the book, I found myself recalling RFPs where the customer asked for a solution to a problem, but it was apparent it had no idea how to design what was being asked for, let alone the cost to build it. It is of little comfort that centuries later, little has changed.

Finally, in August 1367, some 70 years after the foundation stone was laid, the wardens, as they were called, and the citizenry of Florence endorsed the plan to adopt the design of Neri de Fioravanti. The design decision was quite astounding. The span of the dome to be built would be the largest since antiquity and would exceed the dome of the Roman Pantheon, which for more than a thousand years was the world's largest dome.

Competition among architects is considered a time-honored custom that can be traced as far back as 448 B.C.E., when the Council of Athens asked for proposals to build a war memorial on the Acropolis. It was not unusual then for architects to produce models that would best show their designs to convince judges and patrons that their solution was indeed the best. These models were much preferred to a diagram executed on parchment.

By end of September 1418, more than a dozen models had been submitted. As with any competition, the leading carpenters and masons were favored to be the winners. The announcement of the winner was set for September 30, 1418, but the Great Council decided to extend the deadline for two more months to allow one of the designers more time to complete his model and also to give some of the rivals additional time for travel, to transport their models to Florence from faraway cities.

Consultants, even in the fifteenth century, who ever would have thought!

I picked up my blue highlighter and carefully highlighted the paragraph on page 40. The notion of granting an extension was definitely a worthy example for future reference. At the rate I was reading, stopping every few paragraphs to recall my days as a proposal manager, I could see this was not going to be a fast read.

It was time to throw another log on the fire and get a refill on my hot chocolate. Inspired by the competition to build this magnificent dome, I searched the refrigerator for a can of whipped cream. This time I sprayed on enough whipped cream in the shape of my version of what the dome of the Santa Maria del Fiore would look like, pronounced it the winner, and got back to the couch and the book.

In early December 1418, the Great Council, consisting of 13 wardens, consuls of the Wool Guild, and a few consultants (consultants, even in the fifteenth century, who would have ever thought?), met in the nave of the cathedral to evaluate the various designs. It took another two weeks to decide the winner. Finally, a decision was reached. The model that presented an unorthodox solution to the problem was chosen. The winner was a 41-year-old man named Filippo Brunelleschi, a goldsmith and clockmaker.

As with any competition, there is a winner and several losers. This competition was no different. Accusations of inexperience were hurled by many of Brunelleschi's rivals. Over the next few years there would be design changes, challenges to Brunelleschi's ability to design and build what he proposed, and very meager progress payments.

Taking the advice of many a reader, I do not want to spoil the rest of the book for you. I hope you will take the journey back to fifteenth century Florence and the story of Filippo Brunelleschi's quest.

Eats, Shoots & Leaves: The Zero Tolerance Approach to Punctuation!

By Lynne Truss

Publisher: Gotham Books, New York, New York, 2003, Retail Price: \$17.50

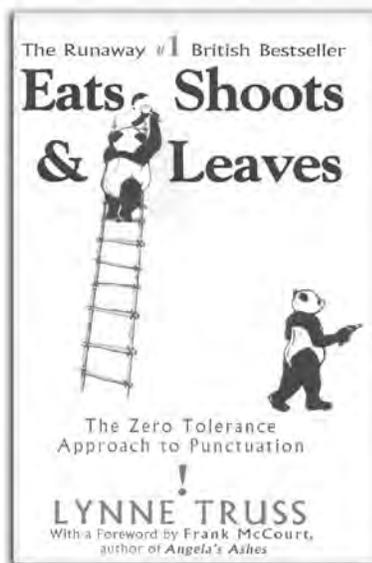
Reviewed by

Ali Paskun, Lead Proposal Manager
Technical and Management Services
Corporation (TAMSCO)

When I was in college I took a course on technical writing. The other students were in the class because they needed another writing credit to graduate; I was the lone soul who wanted to learn the subject matter because my career goal at the time was to write technical proposal volumes. My professor, a wise woman with many years' experience, told me the last day of class, "You have started down the road of no return. Never again will you be able to read anything without editing it in your head and reaching for a red pen." She told me personal stories of time spent editing billboards while stuck in traffic and the long-distance friends who would no longer write her because she returned their letters with redlines. It seemed a little extreme at the time, but I never imagined how true her words would turn out to be. It happened. I realized I had joined the Dark Side the day I found out a former supervisor referred to me as the "Comma-kaze Queen" because of my fastidious insistence on the correct usage of that small mark.

Lynne Truss must, at the least, be my professor's kindred spirit. She understands how seeing a sign at the store advertising "Egg's" for sale can make a person's skin crawl as easily as hearing nails scratching a chalkboard. Being a self-professed "grammatical stickler," she has written a fun-to-read book about, of all things, punctuation!

The common use of e-mail and text messaging has done much to minimize correct punctuation in our every day writing. Truss' rallying cry of "Sticklers unite!"



brings attention to this problem and its ability to "trigger a ghastly private emotional process similar to the stages of bereavement, though greatly accelerated" in the hearts of those who know better. These are the ones Truss describes as having the Seventh Sense, who are "like the little boy in *The Sixth Sense* who can see dead people, except that we can see dead punctuation."

Eats, Shoots and Leaves is a pleasure to read. Truss approaches

her topic with the determination of a woman on a mission. She dedicates entire chapters to the correct use of apostrophes and commas. Other chapters discuss the colon, semicolon, ellipsis, exclamation point, question mark, quotation mark (single and double), dash, brackets, and hyphen. Although some readers may get caught in the mire of technical explanations, Truss offers common punctuation mistakes and ways to correct them. Most of these examples are downright enjoyable in themselves. She also offers some fascinating tidbits on the history behind our standardized set of printers' marks and their evolution over the centuries.

My only wish is that the book had been revised for American readers. Some of the rules and examples presented are decidedly British and can easily confuse someone not aware of the differences. However, at the end of the day, how could I not enjoy a book by an author whose big rule on the use of commas is, "don't use commas like a stupid person?"



Eats, Shoots & Leaves puts comma offenders on the chopping block!

Walking the Tightrope: Balancing Family Life and Professional Life

By Dr. Tom Barrett

Publisher: Business/Life Management Inc.,
Vienna, Virginia, 1994, Retail Price: \$22.00

Reviewed by

Ali Paskun, Lead Proposal Manager
Technical and Management Services
Corporation (TAMSCO)

What do proposal professionals and Representatives on Capitol Hill have in common? At first you might say, "Nothing." But after reading Tom Barrett's book, you just might change your mind.

Too often in the workplace a person is always the focus of attention...get out of the spotlight and let others have center stage.

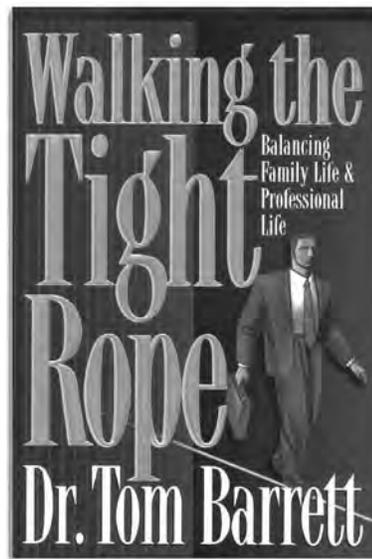
Barrett, a scheduled keynote speaker at the APMP 2005 Annual Conference, worked on Capitol Hill as a "non-political friend to America's Congressmen and Senators." He used his insight gained watching these politicians

Although the book is written from the Capitol Hill perspective, proposal professionals can glean valuable information about how to balance their own lives.

balance their public and private lives...usually unsuccessfully. As stated in the Introduction, "This book is about helping people win where it matters most in the end...in

their primary relationships." Although written as a guidebook to help Congressmen and Senators keep that balance in their relationships, there are many lessons presented that apply to any working professional.

In each chapter Barrett discusses a topic that he has identified as an area of concern over his many years' experience working with these politicians. There are 13 in total, and they include such conclusions as:



1. You need to get out of the spotlight and let others (primarily your family) have center stage. Too often in the workplace a person is always the focus of attention, and they find it difficult to allow someone else to be in that position.

It is more important to manage your schedule than to have your schedule manage you.

2. Don't expect your family members to live their lives just for your career. The example Barrett uses in the book is a politician running for re-election. The politician's entire focus is on the race and doing what is necessary to win, without noticing his family is, in Barrett's analogy, running a marathon to keep things functioning at home without his attention.

Balance can be an elusive aspect of a proposal professionals' lifestyle.



If you take all of the topics discussed in this book and take them down to their simplest element, they are all based on one simple rule: Practice good communication skills. Clearly and effectively communicating your needs and attentively listening to family and peers will go a long way towards heading off just about every problem presented in this book. For example, what is the best way to ensure your children know you care? Listen to them and make what is important to them important to you.

Each chapter ends with a “Think About It” section that contains a list of questions readers can use to determine if the topic discussed in that section applies to their life situation. The questions can help gauge what areas need specific attention to put more balance between personal and professional commitments. What I thought was unique about Barrett’s approach to this section was that the questions are designed to either be used for personal reflection by the reader or as a group discussion with family or colleagues.

3. It is more important to manage your schedule than to have your schedule manage you. Barrett discusses the need to make time in your hectic life for family and friends; not only as a stress reliever, but also to ensure they know how important they are. He gives many examples of spouses and children who felt unappreciated because important events in their lives were given secondary importance to something work related. For example, he tells the story of the man who chose not to attend his son’s wedding because he felt it was more important to fly back to Washington, DC, and cast a vote in Congress.

Clearly and effectively communicate your needs and attentively listen to family and peers.

These are only a few examples of the advice the author gives to successfully walk the tightrope and achieve balance. Most of the topics apply across the board to any working professional as shown in the examples above, while others are more situation specific, such as handling a mid-life crisis or ensuring work doesn’t become so consuming that a spouse feels neglected and has an affair to find the attention missing from the marriage.

Those new to the proposal field are just beginning to understand how easy it could be to burn out.

I found the book interesting for two reasons. One, some of Barrett’s observations are insightful and thought provoking, especially for someone involved in a profession as stressful and deadline-driven as proposal management. I imagine those new to the proposal field that are just beginning to understand how easy it could be to burn out would find Barrett’s advice particularly applicable. Second, his discussions of his years working on Capitol Hill provide a glimpse into a world few ever see. Having the opportunity to experience his perspective of the toll a life in politics can have on a person’s family life and self-image was eye opening. Although Barrett writes that “this book is written for members of Congress; it is not about them,” the book does offer us constituents a chance to see a side of politics we will never experience.

As this book was published 10 years ago, I am looking forward to hearing if time has altered his viewpoints of, and approaches to, achieving balance when he presents his keynote address next June.

The Proposal Gene



By Jayme A. Sokolow, Ph.D.

Dean Hamer, a molecular biologist at the National Institutes of Health, claims that there are genetic links to sexual orientation and spirituality. Thanks to him, we may have identified the gay gene and the god gene. Can the discovery of the proposal gene be far behind?

Thanks, Gene!

Several months ago, I was completing a proposal to the National Institutes of Health for a Montgomery County, Maryland, biotechnology firm. One day as we were anguishing over the Business Volume, a biologist who had worked closely with our proposal team came into my office. Because I cannot reveal his name for reasons that will become apparent, I will call him Dr. Gene Quackenbush.

Gene said to me a little too nonchalantly, “Good morning, Jayme. How’s the Business Volume coming along? Doing anything for lunch today?” “No,” I eagerly responded. “Let’s get together.” In good conscience, I could not decline an opportunity to consume a meal that included neither oatmeal raisin cookies nor pretzels. On just the Technical Volume alone, I already had consumed my yearly carbohydrate requirements.

Over veggie burgers and tofu salad in a nearby restaurant, we talked about proposals and the proposal profession. For a scientist, Gene seemed to have an unnatural interest in these subjects. Toward the end of our lunch, he explained why.

“Jayme, for the past two years I’ve been studying the impact of genetics on the human personality. Have you ever heard of Dean Hamer?” “No,” I replied. “Tell me about him.”

Much of our behavior is heavily influenced by genetics.

As I plunged my fork into a slice of carrot cake with metronomic regularity, Quackenbush gave me a brief lecture about his favorite geneticist. “Hamer is Chief of the Section on Gene Structure and Regulation in the Laboratory of Biochemistry of the National Cancer Institute. His research has been on recombinant DNA, drugs and vaccines, and gene regulation. He is a co-inventor of animal cell gene transfer and is developing molecular therapeutics for HIV/AIDS.”

As my eyes began misting and my feet began falling asleep, Quackenbush laughed and paused. “Sorry, Jayme,” he apologized. “I’ll try to speak in layman’s terms.”

“Based on Hamer’s research on the role of inheritance in human behavior, he published a controversial book in 1994, *The Science of Desire*. In it, he argued that male homosexuality is passed through the maternal side from a set of 22 markers, which are short stretches of DNA that geneticists use to identify a particular spot on a chromosome. Hamer found that the same set of five markers in a particular region were positively correlated with male homosexuality.”

Humans inherit a predisposition to embrace a higher power. This belief provides us with an evolutionary advantage because it offers hope and a sense of purpose.

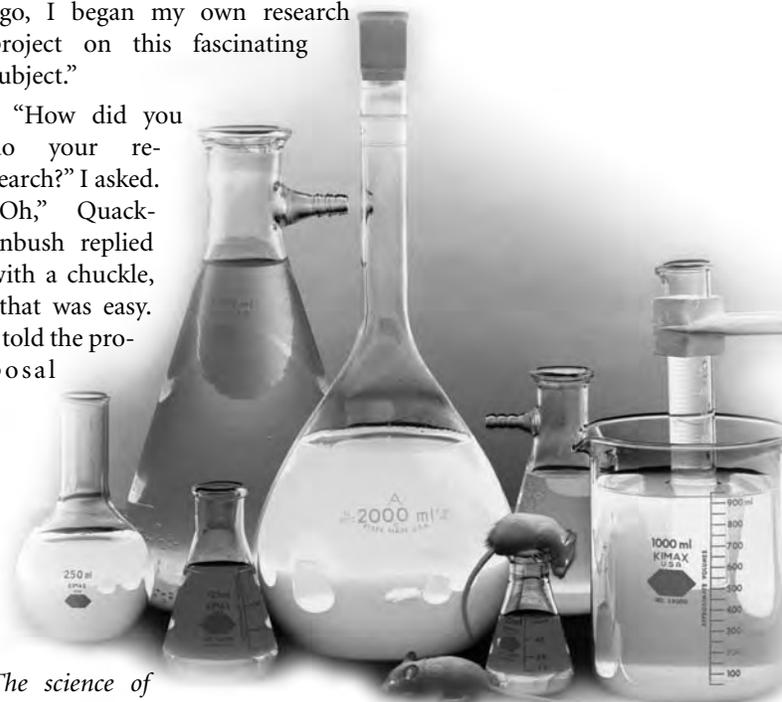
“In 1998, Hamer published another book, *Living with Our Genes*. In this book, he provided plenty of scientific and anecdotal evidence that much of our behavior is heavily influenced by genetics.”

“Recently, in *The God Gene: How Faith is Hardwired into Our Genes*, Hamer argued that humans inherit a predisposition to embrace a higher power. This belief, he said, provides us with an evolutionary advantage because it offers hope and a sense of purpose, which we need to survive. *Time Magazine* just ran a feature story on Hamer and his new book.”

“The book sounds really interesting,” I interrupted. “I’d like to read it.” “I think you would enjoy it,” Quackenbush replied.

After a pause, he said, “Hamer’s research is really why I’ve invited you to lunch. For the past five years, I’ve been studying the genetics of fruit flies. It is very interesting, real cutting-edge, but I found the work a little tedious. Fortunately for me, over the past two years I’ve been working on our company’s proposals to the National Institutes of Health. I began noticing that proposal professionals seemed to have similar personalities, and I wondered whether there was a connection between their genetic makeup and their proposal work. About a year ago, I began my own research project on this fascinating subject.”

“How did you do your research?” I asked. “Oh,” Quackenbush replied with a chuckle, “that was easy. I told the proposal



The science of genetics has grown in leaps and bounds in the past decade.

teams that I was doing research on genetics and personality, and wanted to incorporate them into my study. All of them signed consent forms, which enabled me to take DNA samples from the Styrofoam coffee cups they left all over their offices. I also did their personality profiles, which involved interviews and psychological testing.”

We had a obligation to share this groundbreaking research with the proposal profession.

“How come you never asked me to sign a form? I feel left out,” I said with a smile.

“Oh,” Quackenbush responded in a tone of mock seriousness. “You’re a problem case. You don’t drink stimulants.” Then Quackenbush whipped out a consent form from his briefcase and asked me to sign it. Afterwards, he took out a cotton swab, gently rubbed it on the inside of my mouth, and put the swab in a narrow glass flask. “Now I can add you to my research database,” Quackenbush said with a hearty laugh that I found almost insidious.

“What do you plan to do with the DNA?” I asked. “I’m following the same procedures that Hamer used,” Quackenbush replied. “I’ll see if I can isolate any specific genes that seem common to proposal professionals. This is a small sample, but it’s a start. In the next few years, my database should become larger and more statistically valid.”

By the time Gene had finished discussing his genetic research, I was very intrigued. Although this was only a preliminary study, I thought that the proposal profession should learn more about it. “Gene,” I said, “I work on the staff of *Proposal Management*. Would it be possible for us to publish the results of your research, with the caveats you’ve mentioned?” “Sure,” he replied. “I’d be glad to send you my preliminary results. But you and your colleagues may have trouble understanding the genetics argument. I’ll also send you a brief primer on genetics as an introduction.”

“Great,” I responded. The next morning, I received an electronic file from Dr. Quackenbush. He requested that his real name not be used and that his research be qualified with the words “preliminary” and “tentative.”

John Elder, the Managing Editor of *Proposal Management*, was as excited about Dr. Quackenbush’s research as I had been. After reading the report, he agreed that we had an obligation to share this groundbreaking research with the proposal profession. Consequently, *Proposal Management* is pleased to present the following report about the genetic foundation of proposal professional behavior. Names have been changed to protect the anonymity of the subjects.

A Primer on Genetics

Genetics is the study of how characteristics are passed on from generation to generation through the cells of organisms, which contain genes. Cells are the basic building blocks of life. In the human body, there are literally trillions of cells that provide the body’s structure, take in nutrients from food and convert them into energy, and carry out very specialized functions. Cells also contain the human body’s heredity material, or genes. According to the Human Genome Project, humans have between 30,000 and 40,000 genes.

Human DNA consists of about three billion bases, more than 99.9% of which are the same in everyone.

Each cell, however, only uses a tiny fraction of its genes. The other genes are repressed or turned off. The process of gene regulation makes a brain cell different from the cell of your pancreas. Gene regulation most commonly occurs

On a proposal even coffee cups aren’t safe from scrutiny!



when the information from a gene's DNA (deoxyribonucleic acid) is transferred to a similar molecule called RNA (ribonucleic acid) in the cell nucleus. Gene regulation plays a key role in producing protein molecules, the building blocks of life.

Enzymes make and change the more than 300 chemicals in the brain that help determine how we think, feel, and act.

DNA makes up our genes, and every cell in an individual's body has the same DNA. Information in DNA is stored in a code made up of just four chemical bases: adenine (A); guanine (G); cytosine (C); and thymine (T). Human DNA consists of about three billion bases, more than 99.9 percent of which are the same in everyone. The order of these bases determines the genetic information available for developing and maintaining ourselves. For example, the sequence TCGA means something very different from the sequence AGCT.

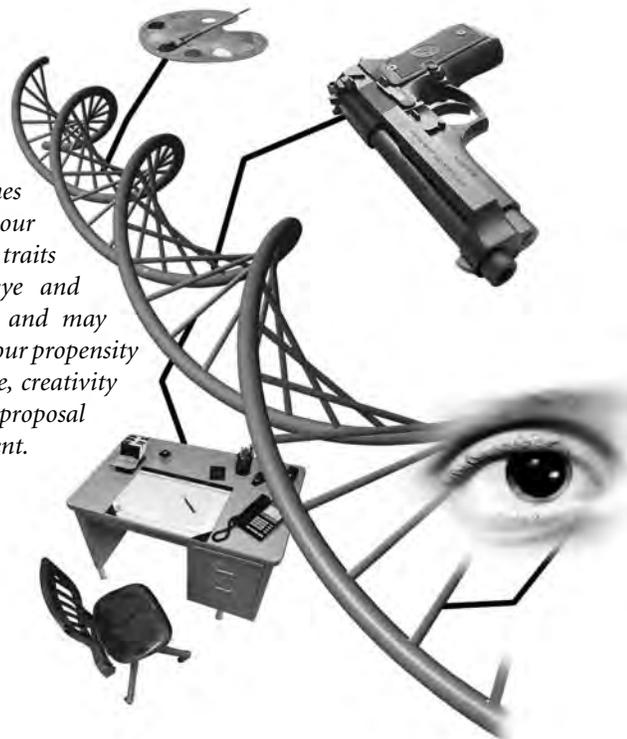
DNA pairs up with each other — A with T and C with G — to form units called base pairs. Each base is attached to a sugar and phosphate molecule, forming a nucleotide. Nucleotides appear in two strands that form a spiral, or double helix. The double helix is like a ladder with the base pairs serving as rungs and the sugar and phosphate molecules forming the sides of the ladder. Each strand of DNA can make copies of itself so that when cells divide, each new cell has the same DNA as the old one.

In the cell nuclei, DNA molecules are constructed of long, thread-like structures called chromosomes. Each cell normally contains 23 pairs of chromosomes. Of these pairs, 22 are the same in males and females. The twenty-third pair, the sex chromosomes, differs between males and females. Males have one X and one Y chromosome and females have two copies of the X chromosome.

Genetic makeup is the single most important factor that explains differences among people.

Information in DNA is converted into proteins, which are composed of amino acids. These proteins have many functions, but the most important one is to act as enzymes that change one chemical to another. For example, enzymes make and change the more than 300 chemicals in the brain that help determine how we think, feel, and act. One enzyme converts the amino acid tyrosine into dopamine, a powerful chemical that makes you feel energized and excited. Another enzyme dissolves dopamine, which makes you feel relaxed or even lazy.

Our genes specify all our inherited traits such as eye and hair color and may also affect our propensity for violence, creativity and even proposal management.

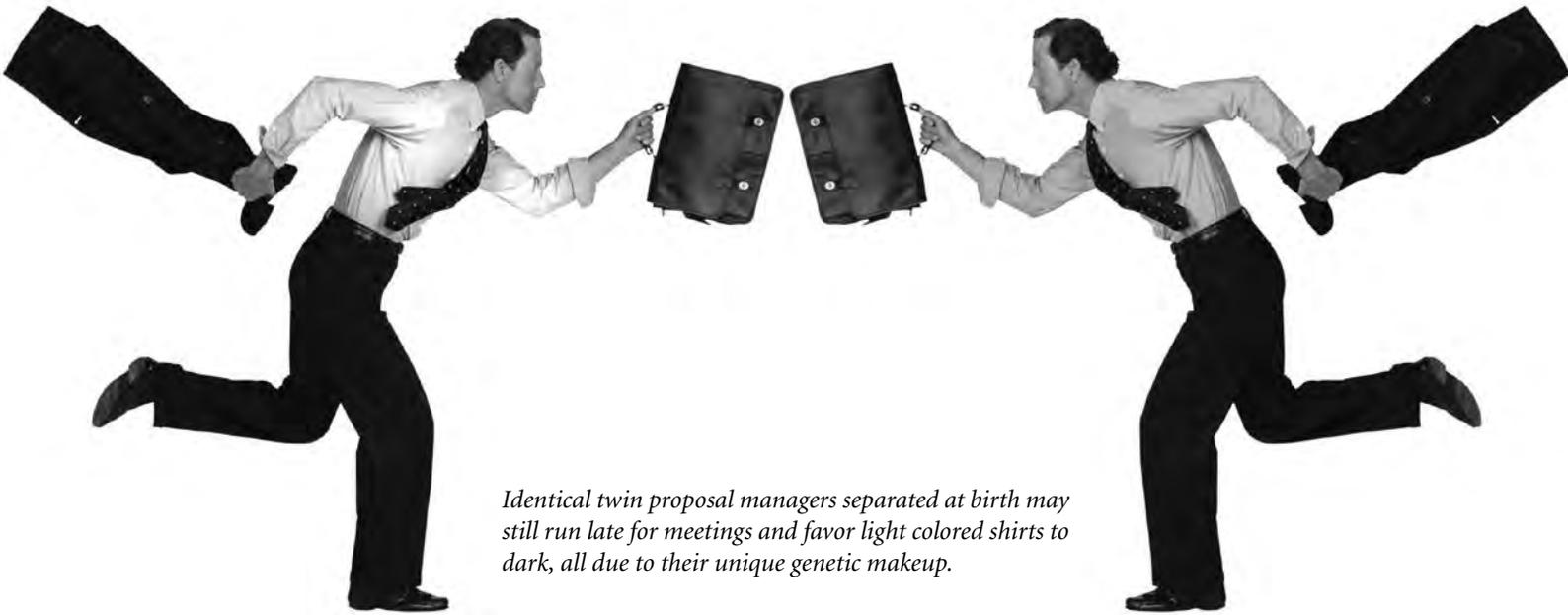


Our genetic inheritance not only may predispose us to behave certain ways, but genes also may encourage us to seek certain environments.

Although we share 99.9 percent of our genes with other humans, the 0.1 percent difference has profound implications. This means there are approximately 3 million differences among the three billion chemical bases in our body, which account for all inherited variations among people from height to eye color to significant aspects of our personality. For example, one difference between you and the person sitting in the first row on the bus may be that you have a C in a particular gene on a chromosome while he has a G in the same location. That difference, however — the equivalent of a single letter in a single book stored in a library of 30,000 books — may help explain why you are outgoing and he is extremely shy.

Genetics and Personality

Over the past decade, molecular biologists and neuroscientists have demonstrated that many of our basic personality traits are genetically inherited. In fact, researchers like Dean Hamer would argue that genetic makeup is the single most important factor that explains differences among people. Just as we inherit many of our physical characteristics from our parents and other blood relatives, we also inherit more subtle aspects of our personalities — our propensity to be happy, to worry, or to be intelligent.



Identical twin proposal managers separated at birth may still run late for meetings and favor light colored shirts to dark, all due to their unique genetic makeup.

Our genetic inheritance not only may predispose us to behave in certain ways, but genes also may encourage us to seek certain environments that will markedly shape our behavior. People are different partly because their DNA creates different brains and personalities. The evidence for the importance of inherited factors comes from studies done on identical twins.

Identical twins develop from one fertilized egg and have the exact same DNA. Fraternal twins, in contrast, develop from separate eggs and, thus, they are as genetically similar as ordinary siblings. By comparing the resemblances among identical twins, we can help gauge the power of heredity. The problem in doing these studies, however, is obvious. Most identical twins are raised in the same homes, with same parents, and in the same neighborhoods. It is impossible to separate environmental from genetic factors. The obvious solution is to study identical twins who were separated at birth or shortly thereafter to see how they resemble and differ from each other.

Identical twins reared apart were very much alike as identical twins raised together.

The most famous study done in the 1980s was the Minnesota Study of Twins Reared Apart. After examining hundreds of Minnesota identical twins who were separated at or after birth, researchers concluded that identical twins reared apart were very much alike as identical twins raised together. To a remarkable extent, these twins were similar sizes, talked similarly, had similar likes and dislikes, and had remarkably similar personalities and life experiences.

Genetic inheritance is the single most important factor that distinguishes us from other people – Can this biological breakthrough be applied to proposal professionals?

We all are the product of nature and nurture. In fact, as Dean Hamer has pointed out, “it’s part of our nature to respond to nurture.” While people are affected by different environments, people differ primarily because they are the product of different genetic inheritances. Studies of identical twins seem to indicate that our genetic inheritance is the single most important factor that distinguishes us from other people. Can this biological breakthrough be applied to proposal professionals?

The Proposal Gene

If people differ because of their genetic makeup, we should be able to trace the genetic roots of personality by linking specific personality traits to specific genes. Among a small sample of proposal professionals responding to biotechnology Requests for Proposals in the Washington, DC metropolitan area (N=34) over a two-year period, all of them exhibited varying degrees of the following personality traits:

1. Obsessive-compulsive behavior
2. A desire to work in thrill-seeking environments
3. An unnatural, insatiable hunger for sweet and starchy carbohydrates
4. Anger management issues.

Pete had developed a fearsome reputation for his ability to organize complex records and remember an astonishing variety of seeming insignificant facts related to his contracts, both past and present.

The remainder of this report will probe the putative links between these personality traits and the subjects' genetic makeup.

Obsessive-compulsive Behavior

Pete Jones had been painfully obsessive-compulsive for as long as he could remember. As a child, he collected old newspapers, balls of string, and major league baseball cards of obscure outfielders with low lifetime batting averages. In high school, he was attracted to school subjects and term paper topics that required the enumeration of staggeringly long lists of facts. After Pete graduated with academic honors, he joined the Marines and gradually became his military base's chief Contracting Officer. He also won his base's "Trivial Pursuit" competition four years in a row. By the time he retired from the Marines,

he had developed a fearsome reputation for his ability to organize complex records and remember an astonishing variety of seeming insignificant facts related to his contracts, both past and present.

At age 41, Pete is now a Proposal Coordinator. He describes himself this way: "Although this is not a pleasant thing to say, I act very compulsively most of the time. It's difficult for me to relax. When I have nothing to do, I feel very anxious. I'm most comfortable working on large proposals that involve many, many details. The more volumes and details, the better. I love making long lists of things to do and crossing them off. This gives me a great feeling of accomplishment."

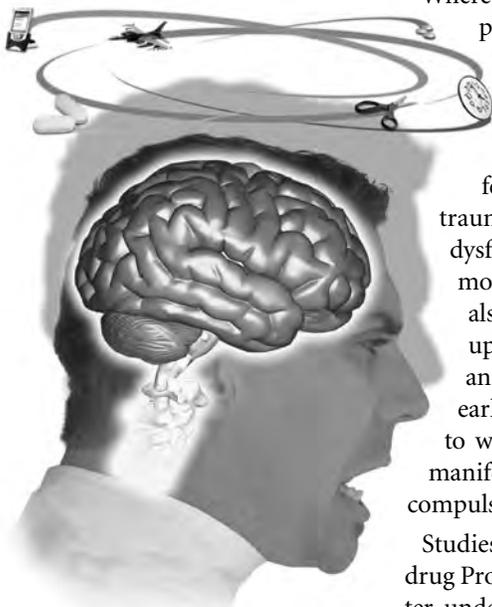
Although obsessive-compulsive behavior is not considered a highly desirable personality trait in many work environments, large number of proposal professionals openly and proudly manifest this kind of behavior.

"I love the capture management life cycle because there are so many steps, sub-steps, and activities in the process. On proposal teams, I am often given the responsibility for tracking all e-mails, ensuring compliance with the RFP, and proofreading the proposal. I love these tasks. I find these tasks deeply gratifying, and they help provide my life with whatever meaning it possesses."

For better or worse, Pete is not unique among proposal professionals. Although obsessive-compulsive behavior is not considered a highly desirable personality trait in many work environments, large number of proposal professionals openly and proudly manifest this kind of behavior.



Obsessive-compulsive proposal professionals are most comfortable addressing statements of work that require many details that must be indexed, matrixed, cross-referenced and re-checked.



Where does obsessive-compulsive behavior come from? A bad life or a certain kind of personality? Although some proposal professionals described traumatic childhoods or dysfunctional families, most proposal professionals characterized their upbringings as happy and normal. But from an early age, they all seemed to worry excessively, which manifested itself as obsessive-compulsive behavior.

The brain of the typical proposal professional is a complex environment filled with competing ideas and resources.

Studies of the impact of the drug Prozac may help us to better understand obsessive-compulsive behavior. Serotonin is a simple molecule and the most widespread neurotransmitter in the brain. We know that serotonin plays an important

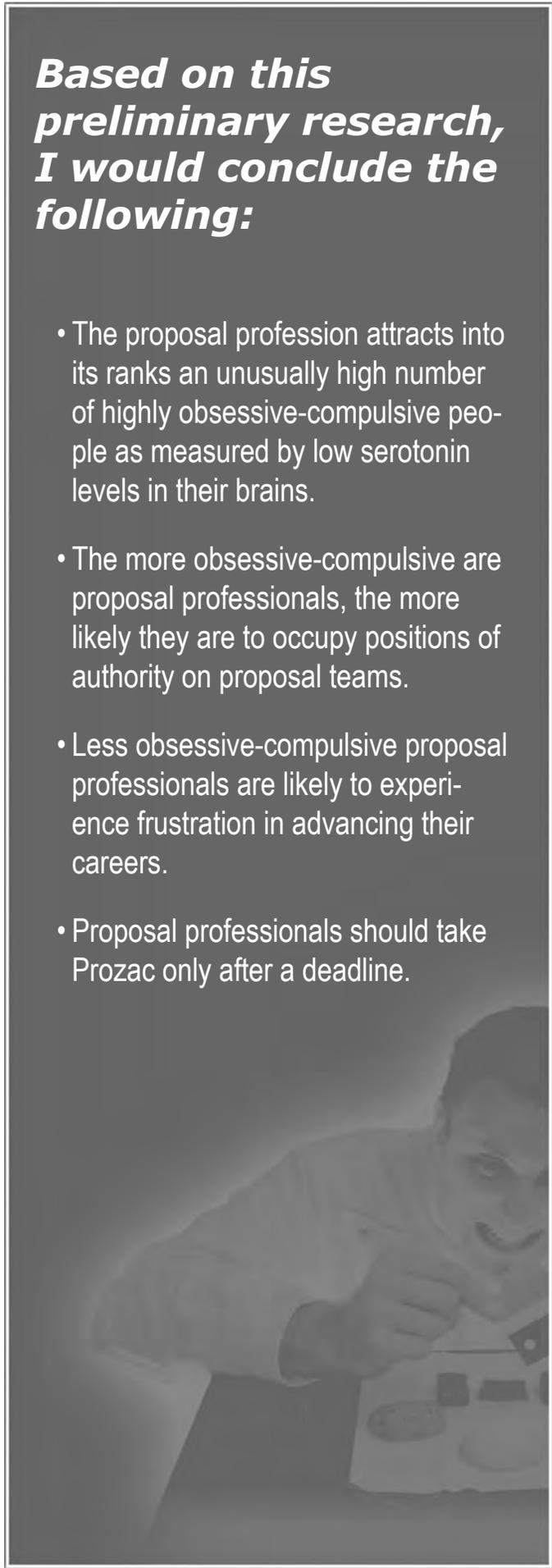
role in harm avoidance, or worrying, but we do not yet know whether the difference between worrying and being happy is due to low serotonin, high serotonin, or changes in the brain's level of serotonin. We do know, however, that Prozac has been successfully used to target the gene that produces the serotonin transporter.

According to recent molecular research, this gene produces different levels of serotonin in different people. About one-third of the population has two copies of the more powerful gene that produces high levels of serotonin while the other two-thirds has one or two copies of the shorter form of the gene that produces less serotonin. There seems to be a strong correlation between the shorter form of the gene and a propensity to worrying and obsessive-compulsive behavior. Of course, there may be other genes that also contribute to this kind of temperament.

Most of the proposal professionals in my study (N=29) had the shorter form of the gene that produces serotonin. They included Proposal Managers, Proposal Coordinators, Book Volume Managers and Capture Managers. Proposal professionals with the more powerful gene (N=5) occupied more modest and less financially remunerative positions on proposal teams. In interviews, they frequently stated that they did not consider proposal development an attractive career option.

Based on this preliminary research, I would conclude the following:

- The proposal profession attracts into its ranks an unusually high number of highly obsessive-compulsive people as measured by low serotonin levels in their brains.
- The more obsessive-compulsive are proposal professionals, the more likely they are to occupy positions of authority on proposal teams.
- Less obsessive-compulsive proposal professionals are likely to experience frustration in advancing their careers.
- Proposal professionals should take Prozac only after a deadline.



Working in Thrill-seeking Environments

Mary Flood walked into a proposal development center like she belonged there forever. She filled the room with her charismatic presence and sent out a powerful message to everyone around her: I am in charge here.

Although proposal professionals might avoid physical thrill-seeking, such as mountain climbing or parachuting, they constantly seek out novel stimuli.

Mary had worked as a Proposal Manager for many large firms for over 20 years. Her friends were like her — middle-aged and rising in the corporate hierarchy. They worked long, hard hours and enjoyed taking risks. The thrill of working on proposals attracted Mary to the proposal profession. She liked receiving a high salary, but Mary enjoyed even more the excitement of managing large proposals with tight deadlines. Unlike her younger brother, who was an elementary school teacher in St. Louis, Mary enjoyed living in the fast lane.

Mary, like many proposal professionals in this research study (N=31), sought out novelty and enjoyed taking risks. Although they were not necessarily fond of high

risk situations, they admitted that they were willing to take risks for the reward of varied and intense experiences, such as working on a proposal. Although they might avoid physical thrill-seeking, such as mountain climbing or parachuting, they constantly sought out novel stimuli. Mary and her friends were excited by new, unconventional, and innovative tasks. They enjoyed putting themselves in risky situations, which are legion in the development of proposals.

Over the last decade, scientists have identified the chemicals in the brain responsible for making us feel that certain environments and activities are pleasurable and rewarding. One of these major chemicals is dopamine, which causes people to feel good. As Hamer has argued, “if seeking new sensations feels good to some people, and the release of dopamine is one way the brain feels good, it makes sense that dopamine might be related to novelty seeking.” Recently, researchers in Israel studying schizophrenia examined dopamine disruptions to the brain. They identified one gene that makes the D4 dopamine receptor called D4DR, which varies greatly from one person to another. Receptors are proteins that form on the side of brain cells. The receptor is recognized by dopamine, which activates a series of chemical reactions.

90% of the proposal professionals in my study had the longer form of the D4DR gene, which appears closely related to a desire to seek out novel situations.



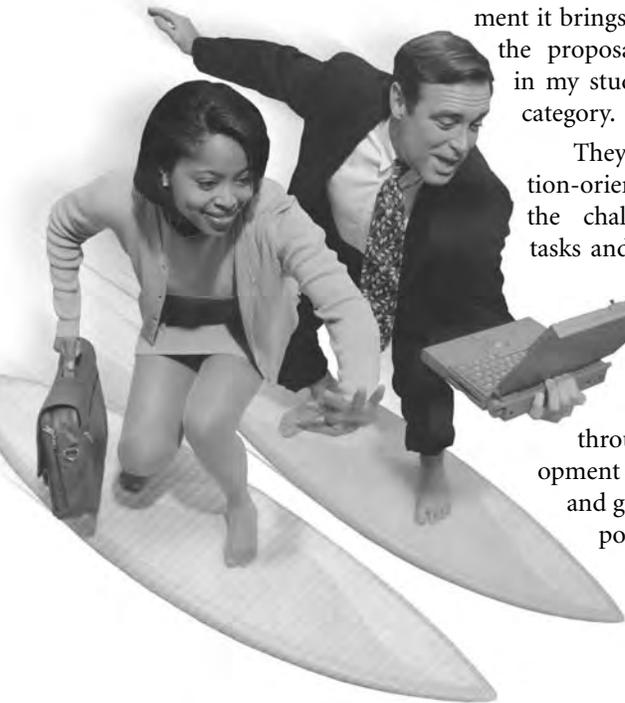
Thrill-seeking proposal professionals enjoy tight deadlines and the adrenaline rush of correcting Red Team documents.

When Israeli scientists did a follow-up study with ordinary people, they discovered that there was a high correlation between the length of an individual's D4DR gene and high scores on psychological tests for novelty-seeking. This research was later confirmed by Hamer's National Institutes of Health laboratory. The Minnesota study of identical twins showed similar results.

Proposal professionals tend to be action-oriented and enjoy high-risk ventures, such as trying to win new business through the development of commercial and government proposals.

Interestingly, 90 percent of the proposal professionals in my study had the longer form of the D4DR gene, which appears closely related to a desire to seek out novel situations. Informal observations confirmed the genetic link. Although everybody likes some degree of novelty, thrill seekers tend to be curious, enthusiastic, and willing to take on risks because of the enjoyment it brings them. Most of the proposal professionals in my study fall into this category.

They tend to be action-oriented and enjoy the challenge of new tasks and high-risk ventures, such as trying to win new business through the development of commercial and government proposals.



The lifestyle of the average proposal professional may not include surfing the waves of Maui but will most certainly involve surfing the Internet.

Based on this preliminary research, I would conclude the following:

- The proposal profession attracts into its ranks a disproportionately high number of people who enjoy thrill-seeking as measured by the longer form of the D4DR gene.
- Thrill-seeking in proposal professionals manifests itself primarily in bureaucratic environments. There is no evidence that proposal professionals are irresistibly attracted to physical thrill-seeking, such as surfing. Many of them, in fact, spend inordinate amounts of time toiling in physically incapacitating cubicles and other distasteful work spaces.
- Proposal professionals who are not fond of risk are likely to experience frustration in advancing their careers.
- In most local chapter meetings of the Association of Proposal Management Professionals, risk-taking activities rarely go beyond random drawings for gifts. Perhaps chapters should consider more exciting diversions to attract and retain thrill-seeking members. Can "Proposal Fear Factor" be on the horizon?

An Unnatural, Insatiable Hunger for Sweet and Starchy Carbohydrates

Sally Gomez was a plump baby, and as she grew older excessive weight became a constant problem. Sally always enjoyed large meals and rich deserts, even after marriage and two children. Seven years ago, Sally was promoted to a Proposal Coordinator at her company, which meant long hours and lots of pressure.

Now George lives a very sedentary life, eats three hefty meals a day along with cookies, donuts, and a few candy bars, and has to buy bigger wardrobes every few years to accommodate his growing girth.

Now Sally feels badly about herself. Since her marriage, she has gained 30 pounds. Although Sally's loving husband encouraged her to lose weight and even purchased a free membership for her in a local health club, Sally was

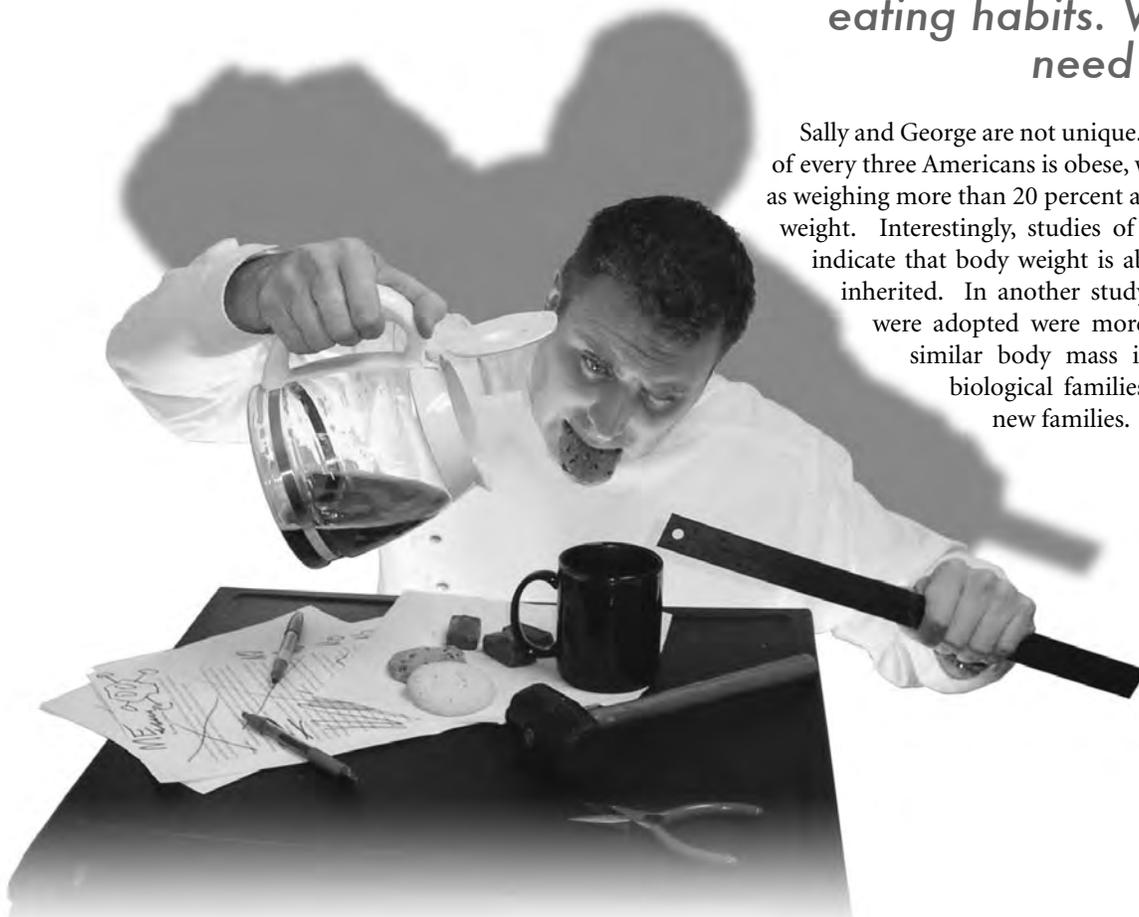
too embarrassed to attend workouts. At the age of 42, she often feels exhausted and spends most of the day sitting in front of a computer, munching on snacks.

Sally works with George Thompson, a Proposal Manager. George has been a conscientious person all his life. When he became Proposal Manager, he starting waking up at 6 A.M. to make the one-hour drive to his company where he would routinely work 12-hour days. Often in the evenings, he would continue working after his children went to sleep.

When George became a Proposal Manager, he weighed about 10 pounds more than he did in college. He used to jog three mornings a week, but George stopped after his promotion because there was no longer enough time to exercise. Then he tried going for walks during lunch, but work became too overwhelming. Now George lives a very sedentary life, eats three hefty meals a day along with cookies, donuts, and a few candy bars, and has to buy bigger wardrobes every few years to accommodate his growing girth.

In recent studies, scientists have found a link between serotonin – which may produce obsessive-compulsive behavior – and eating habits. Worriers may need to eat more.

Sally and George are not unique. Today, one out of every three Americans is obese, which is defined as weighing more than 20 percent above ideal body weight. Interestingly, studies of identical twins indicate that body weight is about 70 percent inherited. In another study, children who were adopted were more likely to have similar body mass indices as their biological families, but not their new families.



Low levels of leptin and serotonin may adversely affect proposal professionals' eating habits and contribute to the consumption of donuts during the proposal life cycle.

Scientists have isolated a gene in the fat cells of mice that may be responsible for obesity. Leptin is an amino acid protein that helps control body weight. Located in the hypothalamus, the brain's eating center, high leptin levels decrease food intake and increase metabolism while low levels do the opposite. Leptin levels are now being studied in humans, but their relationship to eating habits and body weight is unclear.

In recent studies, scientists have found a link between serotonin — which may produce obsessive-compulsive behavior — and eating habits. Worriers may need to eat foods that supply their bodies with serotonin. Sweet and starchy carbohydrates boost the brain's supply of tryptophan, an amino acid that serves as the building block for serotonin. In contrast, foods that are high in proteins also contain tryptophan, but it is the least abundant amino acid and thus it never reaches the brain. Serotonin seems to be the chemical mediator between certain personality traits and eating habits.

The diet of a proposal professional often consists of cookies, donuts and jelly beans frequently consumed by the light of a computer monitor.

Proposal professionals with low leptin and serotonin levels consumed 37% more sweet and starchy carbohydrates than their colleagues.

In my study, about one-third of the proposal professionals (N=11) had low leptin levels, which leads to increased food intake and decreased metabolism. This may be typical of the general population. In dramatic contrast, most proposal professionals (N=29) had the shorter form of the gene that produces serotonin. These individuals tended to be the biggest worriers and the most obsessive-compulsive individuals on proposal teams. They consumed 37 percent more sweet and starchy carbohydrates than their colleagues, probably to boost the supply of tryptophan in their brains. On average, they were heavier than their colleagues after height and gender were factored into my analysis.

This is a troubling observation with serious implications for the proposal profession.

Based on this preliminary research, I would conclude the following:

- Proposal professionals who occupy the most responsible positions of authority are likely to consistently consume greater amounts of sweet and starchy carbohydrates than their colleagues.
- The proposal profession may attract disproportionately large numbers of people who need to consume sweet and starchy carbohydrates. The capture management life cycle may provide these individuals with an acceptable environment in which to engage their craving for tasty but unhealthy foods.
- Proposal professionals who consistently eat high-protein foods may be less likely to be obsessive-compulsive individuals and hence they may experience frustration in advancing their careers.
- During the capture management life cycle, proposal professionals should never snack on celery sticks, kale, or soy peanuts.
- Proposal professionals should be discouraged from purchasing, borrowing, or reading *Dr. Atkins' New Diet Revolution* (2002).

Anger Management Issues

The day is Friday and the time is 4:30 PM. Just as you are feeding the latest version of the Technical Volume into the shredder, the Proposal Manager telephones you. "Where are the three appendices?" he asks. You are irritated by the question because you told him yesterday that you could not complete the appendices until the Technical Volume had been reviewed by the Green Team. You are about to yell at the Proposal Manager, but you stop yourself. "The appendices will be completed by Monday morning," you meekly respond. Inside, however, you are seething because your entire weekend is ruined.

Males have a tendency to anger and aggression because they produce testosterone, which increases dramatically at puberty and gradually declines during adulthood.



Constructive anger management may not be a viable option for many proposal professionals, especially those under extreme stress.

As you leave the office, your body stiffens and your face becomes warm. Your brain has produced chemicals that tighten your muscles, pump blood to the surface of your skin, and produced hormones that make you even more irritable. When you arrive home, your wife asks if you remembered to pick up the chicken for dinner. You quickly lose your temper and start yelling at her.

There seem to be two genetic links to anger. The most important one involves the X and Y chromosomes. In the United States, males commit five times as many aggravated assaults as women, ten times as many murders, and 86 times as many rapes. And, throughout the world, the rate of male-to-female homicide remains constant, even though murder rates vary widely from country to country. As measured by crime statistics everywhere, males are more aggressive than females. In the general population, about one in every 1,000 males have two Y chromosomes, but in the American prison population the figure is five times higher, and among the criminally insane the figure is even greater.

Social structure may influence the amount of serotonin and hence, the anger that people produce – perhaps a more egalitarian social structure would result in more people with high serotonin levels (and lower tendencies towards violence).

Males have a tendency to anger and aggression because they produce testosterone, which increases dramatically at puberty and gradually declines during adulthood. There seems to be a direct connection between high levels of testosterone, anger and aggression. In a study of almost 5,000 US military veterans, the ones with the highest testosterone levels were more likely than their peers to be involved in assaults, physical aggression, or getting in trouble with their superiors. Other studies have demonstrated a high correlation between testosterone levels and aggression in sports.



As noted in the Spring/Summer 2003 edition of Proposal Management, proposal professionals and their hominoid brethren the apes may be more similar than previously believed.

The relationship between being male, levels of testosterone, anger, and aggression is true of just about every species. It is not unique to humans.

The proposal profession attracts into its ranks a disproportionately high number of people with low serotonin levels in their brains which makes them prone to frequent bouts of anger and aggression.

The second genetic link to anger may involve serotonin. In studies of mice, rats and monkeys, increasing serotonin levels made them less aggressive while decreasing serotonin levels led to more aggressive behavior. In one study of monkeys, the level of serotonin accounted for 25 percent of their aggressive behavior.

Interestingly, serotonin levels may also be influenced by the social environment. In studies of monkeys and humans, leaders had higher serotonin levels than those toward the bottom of the social hierarchy. When they changed positions in the hierarchy, so did their serotonin levels. Perhaps our social structure influences the amount of serotonin and, hence, the anger that people produce. Low serotonin levels cause anger, aggression and violence, and this may be partially triggered by one's perception of his or her place in the social hierarchy. Perhaps a more egalitarian social structure would result in more people with high serotonin levels.

These generalizations were borne out by my study of 34 proposal professionals. This is a troubling observation with serious implications for the proposal profession.

Based on this preliminary research, I would conclude the following:

- Male proposal professionals are far more likely than their female colleagues to display anger, aggression, and to commit inexplicable acts of murder and mayhem.
- The fastest and most effective way to lessen anger and aggression within proposal teams would be to immediately fire all the males.
- The second fastest and most effective way to lessen anger and aggression within proposal teams would be to pay everyone the same salary and flatten the hierarchy.
- The proposal profession attracts into its ranks a disproportionately high number of people with low serotonin levels in their brains, which makes them prone to frequent bouts of anger and aggression.
- Proposal professionals who do not frequently display anger and aggression are likely to experience frustration in advancing their careers.

Conclusion: Genetics is Not Destiny

Our genetic makeup predisposes us to think and behave in certain ways. Genetics even may encourage us to seek out certain kinds of environments. But genetics is not destiny.

Proposal professionals, like everyone else, are not robots programmed by their DNA.

Even identical twins raised apart, despite their remarkable similarities, do not display the exact same character traits or experience life exactly the same way. There are no direct correlations between specific behaviors in specific situations and the level of serotonin in your body or the form of your D4DR gene. Life is uncertain, and even when the Human Genome Project finishes mapping our genes, the combination of DNA and environmental influences will always keep our lives a beguiling mystery.

Proposal professionals, like everyone else, are not robots programmed by their DNA. The presence of chemicals such as serotonin in the bodies of proposal professionals will never provide us with convincing explanations for the successes and failures of our proposals. But speculation about the impact of our genetic inheritance on behavior can be a rich source of humor, which is always needed in every profession.

The author would like to thank Jen Mar for providing him with the idea for this article.

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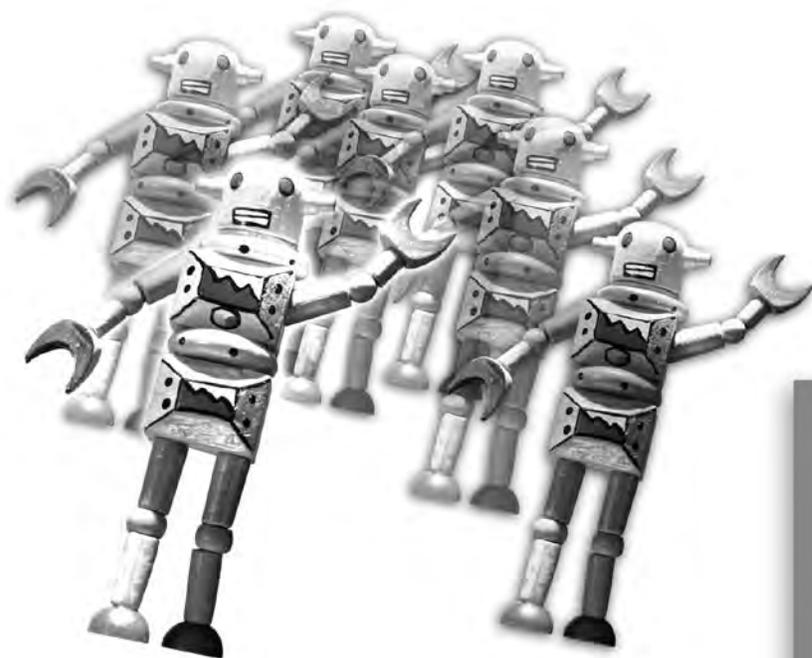
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You are not a robot! Make the most of your genetics and your environment but choose your own destiny.

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Spring/Summer 2004

Article	Jolly, Colleen	<i>Designing a Winning Proposal</i>
Article	Sokolow, Jayme A., Ph.D.	<i>How Do Reviewers Really Evaluate Your Proposal?</i> <i>What the Cognitive Science of Heuristics Tells Us About Making Decisions</i>
Article	Stewart, John Parker & Stewart, Daniel	<i>Orals Coaching: The Secret Weapon for Winning Contracts</i>
Award	APMP	<i>The APMP Fellows Award</i>
Call for Papers	APMP	<i>APMP 2005 Annual Conference Call for Presentations</i>
Review-Book	Paskun, Ali	<i>The Capture Management Life-Cycle</i> <i>(by Gregory A. Garrett and Reginald J. Kipke)</i>
Review-Book	Paskun, Ali	<i>Changing Minds: The Art and Science of Changing Our Own and Other People's Minds</i> <i>(by Howard Gardner)</i>
Sponsorship	APMP	<i>APMP Corporate Sponsorship</i>



Fall/Winter 2003

Article	Parker, Richard A., Duffy Eletha L., Esq., Williams, Jon	<i>Security: The Essential Partner in Proposal Management</i>
Book Excerpt	Sant, Tom	<i>Why the Inuit Hunt Whale and Other Secrets of Customer Behavior</i>
Case Study	Shoulders, Reba L.	<i>Winning Business with International Lotteries: SGI Discovers It's Not All Fun and Games</i>
How To	Sokolow, Jayme A., Ph.D.	<i>Developing a Performance-based Work Statement: Morph Yourself into a Performance-based Expert NOW Before It's Too Late</i>
Profile	Green, R. Dennis	<i>Professor of Persuasion— Dr. Tom Sant</i>
Review-Book	Hannigan, Joanna	<i>Thinking for a Change: 11 Highly Successful People Approach Life and Work</i> <i>(by John C. Maxwell)</i>
Review-Book	Sheffler, Cathy	<i>The Human Organization of Time: Temporal Realities and Experiences</i> <i>(by Allen C. Maxwell)</i>
Review-Book	Williamson, Monica	<i>Winning Behavior: What the Smartest, Most Successful Companies Do Differently</i> <i>(by Terry R. Bacon and David G. Pugh)</i>
To Wit	Green, R. Dennis	<i>Buzzword Bingo</i>



Spring/Summer 2003

Article	Landgren, Theodora	<i>Successful Proposal Translation Strategies: Proven Guidance for Approaching Multi-Language Bid</i>
Article	Munger, Roger, Ph.D.	<i>Information Design: Strategies to Make Your Proposal Reader Friendly</i>
Article	Williams, Jon	<i>Publish and Be Damned? The Powers and Perils of Pre-written Content</i>
Focus on Basics	Garrett, Gregory A. & Kipke, Reginald J.	<i>A Capture Management Life Cycle Primer: Learning to Dance with Customers</i>
Profile	Green, R. Dennis & Meehan, John	<i>David A. Franke – Champion for Air Force Acquisition Excellence</i>
Profile	Green, R. Dennis & Meehan, John	<i>Alan Goldberg, An Inquiry into Effective Acquisition – and Standing the Test of Time</i>
Review-Book	Hannigan, Joanna	<i>Leap. A Revolution in Creative Business Strategy</i> <i>(by Bob Schmetterer)</i>
Review-Book	Hannigan, Joanna	<i>Execution, the Discipline of Getting Things Done</i> <i>(by Larry Bossidy and Ram Charan)</i>
Review-Book	Smith, Maggie	<i>Good Work, When Excellence and Ethics Meet</i> <i>(by Howard Gardner, Mihaly Csikszentmihalyi & William Damon)</i>
Survey Report	Elder, John & Austin, Rick	<i>Productivity, Sales Gains Reported by Users of Proposal Automation Software</i>
To Wit	Sokolow, Jayme A., Ph.D.	<i>The Proposal Professional as Primate: Lessons from the Jungle</i>
Trends & Views	Frey, Robert S.	<i>Beyond Compliance: Towards Solution and Storyline Development as Valuable Proposal Management Core Competencies</i>
Web	Elder, John & Paskun, Ali	<i>Proposal Resources on the Web</i>



Fall/Winter 2002

Capture Mgmt Methodology	Bacon, Terry R. Nutt, Howard	<i>Creating Preference</i>
Packaging Profile	Frey, Robert S. Green, R. Dennis	<i>Business Development Capability Maturity Model and Proposal Professionals Packaging and Managing Proposal Information and Knowledge Effectively</i>
Profile	Green, R. Dennis	<i>Looking Back with Edward J. Velton</i>
Questions	Herndon, David & Ransone, R.	<i>Always In Motion – Patty Nunn</i>
Review-Book	Gaither, Joanna Hannigan	<i>Why, When, and How to Ask Questions on Government Solicitations</i>
Review-Book	Spangler, Barry	<i>Accidental Magic: Wizard's Techniques for Writing Words (by Roy H. Williams)</i>
To Wit	Fields, Barry	<i>Proposal Development – How to Respond and Win the Bid (By Bud Porter-Roth)</i>
Training	Lownie, B.J.	<i>When Par Isn't Good Enough</i>
Training	Wilson, Greg	<i>Improving the Proposal Team (Improvisational Theatre Techniques)</i>
Trends & Views	Devore, Chuck & Moler, T.	<i>Proposal Training for Organizations</i>
Writing	Sokolow, Jayme	<i>US DoD B&P on the Rise: What Does It Mean?</i>
		<i>Taking the Arrogance Out of Proposal Writing</i>



Spring/Summer 2002

Capture Mgmt Leadership	Pugh, David G. Amrhein, Tom	<i>A Bidder's Dozen: Golden Rules for Winning Work</i>
Philosophy	Sokolow, Jayme	<i>Failure to Lead, Leads to Failure: The Art of Proposal Management</i>
Production	Kelman, Suzanne	<i>Fredrich Nietzsche? For Proposal Professionals?</i>
Products-Commerce Profile	Wilson, Greg	<i>Proposal Production: A Primer on Quality Drivers, Lead Times, and Production Task Scope</i>
Review-Book	Green, R. Dennis	<i>Developing 'In-house' Proposal Tools</i>
Review-Book	Parks, Jennifer	<i>The Proposal Industry Council</i>
Review-Book	Peterman, Todd	<i>Sales Proposals Kit for Dummies (by Bob Kantin)</i>
Review-Book	White, Mark	<i>Shipley Associates Proposal Guide for Business Development Professionals (by Larry Newman)</i>
Security	Cavanaugh, Tom	<i>Win Government Contracts for Your Small Business (by DiGiacomo and Kleckner)</i>
Security	Rhea-McKenzie, Denise	<i>Computer Security from a Proposal Perspective</i>
Service-Learning	Munger, Roger	<i>Proposal Security 101: Basics of Managing Competition Sensitive Data</i>
To Wit	Gregory, Eric	<i>Workplace-Classroom Collaborations [Internships]: A Role for Service Learning in Proposal Development</i>
		<i>Reeling in the Big Ones (Lessons from Fishing)</i>



Spring 2001

Electronic Procurement History	Irby, Gay T.	<i>The Electronic Procurement Revolution [NASA]</i>
How-To	Sokolow, Jayme	<i>Nineteenth Century Contracting Foibles in the Building of America's Canals</i>
How-To	Eassom, Dick	<i>MS Word Power</i>
Products-Commerce Profile	Herndon, David H.	<i>RFP Response Mapping and Compliance Identification</i>
Recruitment	Wilson, Greg	<i>RFP Master Product Demonstration Review</i>
Review-Book	Green, R. Dennis	<i>Michael J. Ianelli – A Business Development Virtuoso</i>
Review-Book	Siskind, Jon	<i>Bidding for the Best and Brightest: Recruiting and Hiring Top Quality Proposal Professionals</i>
Telecommuting	Bennington, Amy	<i>Government Proposals: Cutting through the Chaos (by Rebecca Shannon)</i>
Trends & Views	Bielak, Susan	<i>Successful Proposal Strategies for Small Businesses, 2nd Ed. (by Robert Frey)</i>
Web	Greer, Sherri R.	<i>Telecommuting and the Proposal Manager</i>
	Dean, Roger	<i>Demise of Dinosaurs</i>
	Ognibene, Peter J.	<i>Net-working the Web</i>



Fall 2001

Best Value	Dempsey, David B.	<i>Best Value Proposals Under OMB Circular A-76</i>
Best Value	Mickaliger, Michael J.	<i>Best Value Contracting: Selection by Perception</i>
Cost Control	Turnbull, Duane	<i>Tips to Cutting Proposal Costs</i>
Cost Proposals	Dean, Roger	<i>Dollars and (Non)Sense [Trends & Views]</i>
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Cost Proposals	Oyer, Darrell J.	<i>Developing Cost Estimates for Proposals to the Government [Book Excerpt]</i>
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Review-Book	Wilson, Greg	<i>Proposal Automation Products – Product Survey</i>
Review-Book	Green, R. Dennis	<i>Perpetual Youth: Story of Lou Robinson and Gene Dawson</i>
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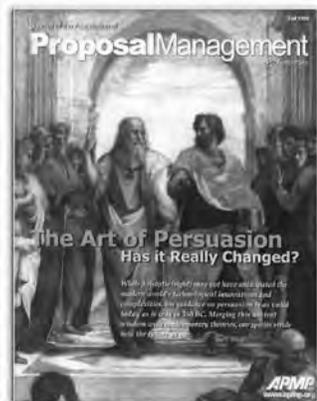
Spring 2000

Case Study	Mesing, Paul	<i>Metrics at NCR's Proposal Center</i>
Case Study	Salamida, Marietta	<i>Process Improvement Methodology [Lockheed Martin Federal Systems]</i>
History	Starkey, Walter S.	<i>The Beginnings of STOP Storyboarding and the Modular Proposal</i>
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Fall 2000

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Case Study	Rhea-McKenzie, Denise	<i>A Virtual Private Network Case Study [Litton PRC Defense Systems]</i>
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Electronic Procurement	Nunn, Patricia A.	<i>Federal Electronic Procurement, Past and Future: Feeding 'Need for Speed'</i>
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Products-Commerce	Dickson, Carl	<i>Web Technology – Trends to Watch</i>
Profile	Green, R. Dennis	<i>Spotlight on Marianne Gouveia</i>
Profile	Rider, Rick & Green, R. Dennis	<i>Steve Shipley: CEO, Shipley Associates, Inc.</i>
Review-Book	Maddy, Lisa M.	<i>How to Write a Statement of Work -4th Ed. (by Peter S. Cole)</i>
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Trends & Views	Dean, Roger	<i>Virtual Teaming – The Proposal Siren Song</i>
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Spring 1999

Graphics	Horton, William & Horton, Katherine	<i>Picture-Perfect Proposals: Putting Visual Literacy to Work</i>
Leadership	Green, R. Dennis	<i>Leadership as a Function of Power – Gary Yukl Research</i>
Orals/Pres.	Leech, Thomas	<i>The "Murphy Foiler" Checklist</i>
Orals/Pres.	Leeds, Dorothy	<i>Conquer Speaking Faults and Succeed as a Team</i>
Orals/Pres.	Pease, Gregory W.	<i>Persuasive Oral Proposal Presentations</i>
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Persuasion	Durack, Katherine T.	<i>It All Comes Out In The Wash: Persuasion in Technical Proposals – 19th C. Washing Machine Applications [Patent]</i>
Persuasion	Sokolow, Jayme	<i>The Darker Side of Persuasion: Stanley Milgram's Experiments on Obedience to Authority</i>
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Profile	Green, R. Dennis	<i>Profile – Steve Myers: Chairman and CEO, SM&A Corporation</i>
Review-Book	Giguere, Paul	<i>Franklin Covey Style Guide for Business and Technical Communication, 2nd Ed.</i>
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Fall 1999

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History	Boren, Tom	<i>How Industry and Later APMP Made Contributions to Proposal Process</i>
History	Boren, Tom	<i>Win Rate Mischief [Trends & Views]</i>
History	Boren, Tom	<i>The Impact of Evolving Government Procurement Practices</i>
History	Boren, Tom	<i>The Impact of Technology (on Proposal Development)</i>
History	Sokolow, Jayme	<i>Renaissance Proposal Managers – da Vinci and Machiavelli</i>
History	Sokolow, Jayme & Green, R. Dennis	<i>Wright Brothers' 1908 Proposal for a Heavier-Than-Air Flying Machine</i>
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Review-Book	Mitchell, Linda	<i>Show Me: The Complete Guide to Storyboarding and Problem Solving (by Harry I. Forsha)</i>
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Review-Book	Prichard, Beth M.	<i>High-Impact Presentations: A Multimedia Approach (by Jo Robbins)</i>
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