



News & Views

June 6 Speaker to Focus on Red Teams

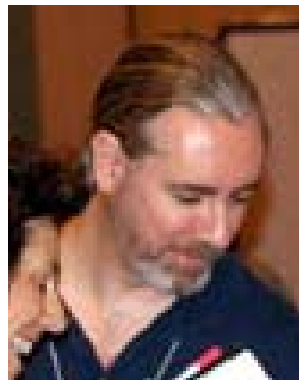
Save the Dates and Follow the Links ...

- [APMP Conference, May 29-June 1, Savannah, Ga.](#)
E-Mail: apmpinfo@apmp.org
- [APMP Houston Chapter Meeting, Wed., June 6, 3100 Briarpark Dr.](#)
- APMP Social Hour, Wed., June 20, Fox & Hound, 11470 Westheimer, 5 p.m.
- APMP Houston Board Meeting, Wed., June 27, 3100 Briarpark Dr.

“Evolving Past the Red Team Review” will be the topic delivered at the next Greater Houston Chapter of APMP meeting on Wednesday, June 6. The meeting begins at 11 a.m. at ABB, 3100 Briarpark Drive, in the Bryan/College Station Conference Room.

Admission to the June meeting is \$20 for members, \$25 for non-members, and \$15 for students (student ID required), and includes lunch. Seating is limited. For more information and to make reservations, call 713-821-4197.

Leading the discussion will be our guest speaker, Carl Dickson, editor and publisher of [CapturePlanning.com](#). Mr. Dickson will emphasize that the overuse of “color” codes for various levels of proposal reviewing has led to confusion among participants. Usually,



Carl Dickson will lead a discussion on “Evolving Past the Red Team Review” at the next chapter meeting. (Photo courtesy of the Georgia Chattahoochee Chapter of APMP)

he says, stakeholders end up with differing expectations, resulting in less productive proposal reviews. Mr. Dickson will offer suggestions to help make proposal reviews more useful.

Mr. Dickson is well qualified to speak on the topic. Since 1989, he has provided proposal and business development support, helping companies submit more than 200 proposals to government and commercial clients.

Additionally, Mr. Dickson was vice president of a proposal consulting firm, developed a Web-based platform for proposal management called PropLIBRARY, helped a subsidiary of a Big Five consulting firm with business development, and has provided independent consulting to help firms develop business and proposals.

Mr. Dickson is also a two-term past president of the National Capital Area APMP Chapter and is a prolific writer and frequent speaker on business and proposal development topics.

In This Issue ...

From the Prez	2
Proposal Resume Tips	3
Name Our Newsletter	3
The Ethical Maze	4
Chapter Social June 20	5
Accreditation Workshops	7
Road to Accreditation	8

Chapter to Mark 10th Anniversary at Meeting

It’s hard to believe, but the Greater Houston Chapter of APMP is now 10 years old. It was May 22, 1997, that the chapter first received its charter.

Since that time the chapter has gone through many ups and downs, but we are still here and going strong. To mark the occa-

sion, we will mark the chapter’s milestone anniversary. So please come join us on Wednesday, June 6, not only for a great speaker but also to help cheer! We will have special treats, including door prizes! Companies that have generously provided prizes include:

- [Purple Possum Winery](#)

- Turtle Woman Soap Company
- [ShIPLEY Associates](#)
- [ABB](#)
- [Porta-Kamp](#)

So take a break from your busy schedule and come join the fun!

From the Prez: *Help Make Our Newsletter Successful*

“How successful this newsletter is will depend on you, our members. Anyone can contribute – so please feel free to send in an article, announcement of a new employee, promotion, or even achieving accreditation. We look forward to hearing from you!”

Welcome to the first issue of the Greater Houston APMP Chapter newsletter!

I know myself how difficult at times it can be to make a general meeting. As proposal professionals, our work schedules are deadline driven and can change at a moment's notice. So for those of you who can't make the meetings, we're going to bring the benefits of our general meetings to you!

The aim of this newsletter is to

improve communications with our members and regular guests. Here you will find follow-up articles from past presenters, information on our next general meeting, news on the local chapter as well as national news, and member news briefs.

How successful this newsletter is will depend on you, our members. Anyone can contribute – so please feel free to send in an article, announcement of a new employee, promotion, or even

achieving accreditation. We look forward to hearing from you!

Regards,

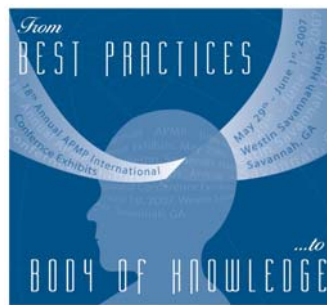


Jeannette Waldie
President,
Greater Houston APMP Chapter
and Central U.S. Regional
APMP Representative

It's Still Not Too Late to Make Your Plans for APMP's International Conference and Exhibits, Set for May 29-June 1 in Savannah, Ga.

Plan to attend the 18th Annual APMP International Conference and Exhibits, May 29-June 1, 2007, in Savannah, Ga. The theme this year is “From Best Practices to Body of Knowledge.”

The presentations are designed to show how we advance best practices to become a part of our body of knowledge. All presentations will be aligned with APMP's Professional Accreditation Program for Proposal Man-



agement Professionals. Go to www.APMP.org for more information.

For those interested in obtaining

their accreditation, Shipley will be offering an all-day accreditation workshop for both Foundation and Practitioner levels on the Friday following the conference. You can register through e-mail. The amount shown on the registration form is what you will be charged. No need to worry about exchange rates!

For more information go to <http://www.shipleylimited.com/savannahreg.htm>.

Two outstanding contributors to

our profession and founding members of APMP are retiring this year, Stephen Shipley of Shipley Associations and Steven S. Myers of SM&A. To honor their contribution to the profession and the organization, the APMP National Board of Directors unanimously agreed to rename two of our annual awards in their name: The Stephen P. Shipley Award for APMP Chapter of the Year and The Steven S. Myers Award for APMP Chapter Chair of the Year.

Our APMP Alliances:

- [Society for Technical Communication](#)
- [Contract Services Association of America](#)
- [Business Development Institute International](#)
- [Association of Cost Engineers](#)

Houston Chapter Members in the News

Editor's Note: Our newsletter will publish your news of recent achievements in the proposal profession. If you have been promoted, started a new position, attended a proposal workshop, or achieved a level of APMP certification, please pro-

vide us the details. You may forward your member news items to mjk77@yahoo.com.

Michael Kent has transferred to the EDS Global Sales Support team that specializes in proposals to government agencies. He

previously served as a solution content developer for one of EDS' commercial proposal support teams. Kent joined EDS in 1998 and has been a proposal professional since 2001. He earned APMP Foundation™ accreditation in December 2006.

Selling Your Team: Proposal Resumes Do's and Don'ts

By Jeannette Waldie
APMP Houston President

Research shows reviewers often turn first to the project organization section to identify who has been proposed as the project manager or project lead. Why? They want to know who they are going to be putting up with for the next year, two years, or even five years.

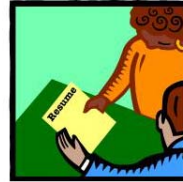
Even if your management does not recognize how important resumes are, it is important that you and your team do. Poor resumes can lose a proposal. Here are some Do's and Don'ts to keep in mind the next time you are preparing resumes.

Do ...

- 1** Start developing your resumes at the front end. This allows you to work on them while waiting for information from subject matter authors.
- 2** Use only projects that are relevant to what you are bidding on.

What Makes a Good Resume?

- "Elevator Speech"
- Qualifications Bullet List
- Prove Your Projects
- Link It!



The "elevator speech" focuses on key capabilities that your client wants and your candidate best suited to fill them. Qualifications bullets should focus on only specific, relevant information. Finally, prove your projects and link relevant aspects to the project you are bidding on.

3 Link the projects on the resume with a bullet text box highlighting how they relate to the project you are bidding on.

4 Include a success story in each project write-up.

5 Make sure project name, client name, and overall description are consistent.

6 No direct project experience? Highlight budget and scheduling management skills, communication, organizational skills, local or client experience.

7 Proof the resumes as thoroughly as you do the main sections of your proposal.

Don't ...

1 Don't go past five years in project experience even when not dictated by the RFP.

2 Never include a resume longer than three pages, even when not dictated by the RFP.

3 Don't include acronyms with out defining them – unless they are standard terms to

your industry.

4 Don't include general statements – focus always to your potential project

5 Don't use lots of boiler plate. If you are forced to, proof and edit carefully.

6 Don't stretch the truth too much. You never know when someone on your review committee has worked on a past project highlighted.

7 Don't write in Engineer Speak! Use regular language anyone can understand.

Jeannette Waldie is the proposal manager for Porta-Kamp International and previously managed a variety of commercial and government proposals in industries such as software control systems, civil engineering, and manufacturing. She has worked in all aspects of the proposal process from template design and formatting to coordinating a proposal team of 30 for a \$1 million proposal effort.

Remember to Bookmark:

<http://www.apmphouston.org>

<http://www.apmphouston.org/Library.html>

<http://www.apmphouston.org/Employment.html>

<http://www.apmp.org/siteSpecific/job/jobBank.aspx>

Enter Our 'Name the Newsletter' Contest

Now that the Greater Houston Chapter of APMP has a new newsletter, it needs a new name ... and we're going to award a prize for the winning entry.

The APMP Houston Board of Directors is sponsoring a "Name Our Newsletter" contest in hopes of generating interest and involvement with the chapter's new communications piece. The

contest is open to members and nonmembers alike (board members not eligible), and the winner will be announced with the publication of our next newsletter.

To enter, please send your suggested newsletter name with your name and contact phone number to mjk77@yahoo.com. Entry deadline is midnight on Friday, June 22.

Only one entry per person is allowed. If multiple contestants submit an identical entry, the one who submits the entry first will be considered.

The winner will be determined by the APMP Houston Board of Directors. The winner and prize will be announced in the next newsletter.

Finding a Way Through the Ethical Maze

*Editor's Note: The following article originally appeared in Spring 2007 edition of **Executive Summary**, the newsletter of the [APMP National Capital Area \(NCA\) Chapter](#). This article is being reprinted with permission by the author.*

By Michael A. Scruggs, PPM.APMP

As capture or proposal professional, how ethical are you? You probably aim for honesty and integrity in all of your business affairs. Yet, we all have to make some tough calls when we're in the process of developing proposals, where we get a bird's eye view of corporate virtue and vice. What do you do when you see bad decisions being made, especially when you are told to support something you think is wrong?

In putting together a staffing plan for smaller firm years ago, I was directed by a vice president to profile the company's pool of talent using materials located in a file drawer, where I found a collection of resumes with accompanying cover letters. After reviewing them, I realized the most of the resumes were at least a year old; some had been in the drawer for nearly five years. I was new on this job, and still learning the ropes, but I knew I had never met, much less seen, any of the bright, skillful people represented by these resumes. A company hiring manager verified that the resumes had been submitted in response to the company's were sent to the company from individuals responding the company's past recruitment efforts.

I went back to the vice president to share my concerns. "Just identify the best people and put in the proposal. No need to call them. I do it all the time," the executive commanded.

Making my next decision was not that difficult. As you may have already noticed in your own careers, most companies that cut ethical corners are crummy places to work for, even before you stumble on to their real problems, such as moral failure. I couldn't get out of the

door fast enough.

I left that assignment because it violated my personal standards of what I define as right and wrong. I wouldn't want my resume part of a company's business proposal without my knowledge, so I saw the use of dated resumes where a company had no intention of hiring the individuals unethical.

But the meaning of "ethics" is hard to pin down. The vice president may have thought

that the use of the resumes was reasonable, and not an ethical violation.

APMP provides us a *Code of Ethics* that we, as APMP members, are expected to follow. Until I started this article, I was unaware of the code, so don't feel alone if this is the first you have heard of it. As an APMP member, we are expected to:



Continued on Page 5

Finding a Way Through the Ethical Maze

Continued from Page 4

- Comply with rules, government regulations, and laws in their respective countries, as well as other appropriate private and public regulatory agencies.
- Ensure compliance with all rules concerning interaction with clients and Government liaisons.
- Protect sensitive information and comply with all legal requirements for the disclosure of information.
- Avoid conflicts of interest, or the appearance of same, and disclose to their employer or client any circumstances that may influence their judgment and objectivity.
- Ensure that a mutual understanding of the objectives, scope, work plan, and fee arrangements has been established before accepting any assignment.
- Represent the proposal profession with integrity in their relationships with employers, clients, colleagues, and the general public.
- When in doubt about how to resolve an ethical dilemma, confer with a person you trust – one who is not directly involved in the outcome.

There is a lot of wise guidance here, and I can see how the code can help you in ethical dilemmas.

For example, if you're asked to do something unethical – regardless of magnitude – you can always whip out the code and state that as a proposal professional, you have to follow this code.

Most of the companies we work for also have similar codes of ethics. In researching this article, I visited many federal contractor Web sites to specifically identify if they had codes of ethics or ethics programs. Almost all did.

Most of the larger federal contractors seem to have the deepest ethics programs. Perhaps this is reflective of the large amount of government business they receive and the necessity to keep busi-

ness above board.

I was refreshingly shocked on my first day on the job at SAIC several years ago. At the orientation session, the facilitator explained there were several different channels through which an employee could seek assistance with ethical issues. At the time, there was an independent Employee Ethics Committee composed of mid-level

professionals who promised objectivity and privacy. That seems a lot more comfortable that writing to the CEO or to the Board of Directors about an issue. There was also a confidential Ethics Hotline, which would connect you to knowledgeable person to help with an ethical dilemma.

Continued on Page 6

You are cordially invited to attend

Houston APMP Social Hour!

At Fox and Hound
English Pub and Grille!
11470 Westheimer ♠ Houston, TX 77077

(Located West of Beltway 8
Between Wilcrest and Kirkwood)

**The party starts at 5 p.m.
on Wednesday, June 20, 2007**

Hosted by:



Billiards, Darts, Shuffleboard, 8' Screen TVs
Beers, Liqueurs, and Fine Wines from Around the World!
More Than 30 Beers on Tap! Happy Hour Specials!
Cash Bar! Drawings for Door Prizes!

To Help Us Plan Our Gathering,
Please RSVP by Wednesday, June 13,
to Michael Kent @ 713-982-6249
E-Mail: mjk77@yahoo.com

Finding a Way Through the Ethical Maze

Continued from Page 5

On the flip side, you have a company like Enron, whose 65-page official *Code of Ethics*, published in 2000, began with a letter from Enron founder and former CEO Kenneth Lay, who states he conducts business “in accordance with all applicable laws and in a moral and honest manner.” He also advises, “We know Enron enjoys a reputation for fairness and honesty that is respected. Enron’s reputation finally depends on its people, you and me. Let’s keep that reputation high.”

Do these programs work, or are they only window dressing? Most researchers in the field state these programs work because they eliminate unethical or questionable practices. At very low cost, business ethics boosts output, promotes recruitment and retention, and reduces misconduct and employee fraud.

It seems to me it’s ultimately up to each of us to be responsible for our actions and to enforce ethical standards within our own business area of influence. It’s up to us to use the available tools and resources and take action, instead of others to make the first move.

Let’s look at some of the everyday areas where ethics plays. Are the Certifications and Representations submitted with your proposal honest and accurate? In fact, is everything being submitted in the package accurate, and is the company being true to its word? According to APMP’s *Core of Ethics*, we really don’t have a choice but to identify a falsehood or misleading statement. And my experience is once an erroneous statement is identified as unethical, few are willing to defend it.

How about some of the ethical questions to those of us working as consultants face?

Russell Smith, owner of Organizational Communications Incorporated, sees conflict of interest as a real problem among proposal consultants. He cites knowledge of consultants that work for more than one company on

a bid. When such instances are found, consultants that blatantly violate conflict of interest norms – such as working for two direct competitors on the same program – are likely to have a short shelf life in the proposal consulting industry.

So remember: When signing the customary Non Disclosure Agreement, or NDA, the written legal terms identify all conflict of interest clauses that the consultant is obligated.

Sharing client information and, in particular, past proposal materials, is also an industry sore spot. The reuse of proposal materials from past client with future clients is a recurring problem, according to Jayme A. Sokolow of The Development Source, Inc. He sees proposal reuse as a reoccurring problem, despite the confidentiality agreements of the NDA.

When signing the NDA, the consultant agrees that the work developed during the term and scope of the agreement belongs to the organization hiring the consultant. Consultants should not use previous proposal materials until permission is granted from the company that owns the material.

While breaking the NDA is a black and white situation, conflict of interest can manifest itself in shades of gray. For example, consider an IDIQ program where 50 contracts are to be awarded. Does it matter if the consultant works with more than a single firm? Consider the further issue: What if a single program has more than one bid category or functional category. Is it permissible for the consultant to work for two bidders when bidding different categories? Ultimately, the contractor has to make the decision in these gray areas. High ethical and moral standards should be the guide when in these moral mazes. When in doubt, proposal professionals should refer to our code.

What about contractor placement with clients?

Contractors should not work for more than a single contractor on the same bid. But should a firm that works with multiple clients be precluded from sending consultants to multiple clients working on the same bid?

The answer might lie with the size of the placement firm. Smaller firms tend to be exclusive to a client, while larger firms might find an exclusivity provision against their business model. Obviously, a firm that is providing a full team to support a client’s bid effort would have a conflict supporting a second client proposing on the same bid.

But what about larger placement firms with many consultants and multiple sales personnel? Many of these firms follow the practice of assigning different sales personnel to different accounts and serving multiple customers on the same bid. The theory is that, as each client comes in, you simply provide the best solution given the requirements.

This situation might be a conflict of interest in the case of two customers competing and buying whole proposal support. However, in cases where the customers are ordering staff augmentation, there may not be a conflict of interest.

Then there are still other cases in which the client considers any help provided to a competitor, even in a multiple award situation, to be a conflict of interest. In those cases, the proposal services firm needs to make a decision and to be above board. Clients need to know the situation. For the firm, the heart of the issue is how can it provide the same talent to multiple clients bidding on the same bid and still maintain good ethics?

But where is my check? Like everyone else, consultants have the demands of paying a mortgage and providing food on the table. So, nothing is worse to hear than “the check is in the mail” week after week. The payment process goes like this: The client pays the proposal

Continued on Page 7

After-Conference Accreditation Workshops Planned for June 1

If you plan on attending the APMP International Conference and Exhibits in Savannah, Ga., later this month and at the same time are contemplating taking that first step toward accreditation, then APMP has just the workshop for you!

On June 1, after the conference, Shipley will conduct an APMP-approved workshop for the APMP Foundation™ exam. This full-day workshop will provide you with the opportunity to learn and/or consolidate your existing

knowledge in each of the proposal development key competency areas.

By attending this course and sitting in on the examination at the end of the workshop, participants can achieve the APMP Foundation level of accreditation.

The event will be held at the Westin Savannah Harbor. To register for the event, please visit <http://www.shipleylimited.com/savannahreg.htm>

Free PPAQ Workshop

This workshop has been designed to provide an interactive forum for you to consider, discuss, and confirm the experience and evidence required for each of the individual syllabus topics that are assessed at Practitioner level.

During the workshop you will be encouraged to take notes and pre-prepare a summary of your PPAQ. It has been designed to guide you through the following:

- How to complete the PPAQ
- What additional training or experience you may need

Attending this workshop will provide you with the confidence to know that when you submit your PPAQ for assessment it will meet the APMP standards.

The event will be held in the Westin Savannah Harbor. To register for the event, please visit <http://www.shipleylimited.com/savannahreg.htm>

Finding a Way Through the Ethical Maze

Continued from Page 6

placement firm and the proposal placement firm pays the consultant. This is not a terribly difficult process.

Why does something so easy not work all the time?

Companies of all sizes can have issues with paying for services on time. Large companies often wait until the 30th day of billing before a check is issued, sometimes later, while enjoying the cash flow benefits of late payment. While the majority of these companies know the rules of the road, some recognize the smaller firms awaiting payment have little recourse but wait (and wait, and wait). Late payment is better than costly litigation, especially when the firm wants to keep the big business client.

Smaller companies also pay late,

but for other reasons. These clients view the cost of the consultant as significant, and have trouble paying full value as agreed. In some cases, they believe they received imperfect service because the consultant didn't deliver a winning bid, or was unable to provide an unreasonable quantity of work.

An uncommon number of small businesses, according to Mr. Smith, will enter into a deal not expecting to pay the full value of services. Such businesses have the idea of waiting until the work is complete and then finding faults as an excuse to reduce the payment due, sometimes as much as 50 percent. And at the bottom of it, there is nothing more at work here than an ethically challenged business principal who does not want to pay full value. These individuals

know the amount and circumstance would not permit successful litigation. So they get away with it, but the word-of-mouth eventually catches up with them.

A bad pricing model can also be a culprit. Firm fixed pricing of a proposal effort can be disastrous because some proposal managers are unable to manage the demands of the proposal effort and a fixed budget at the same time. Hourly billing gives flexibility and is far more equitable, especially when unforeseen forces such as proposal amendments or modifications are issued or the proposal due date is extended.

There are many other ethical issues that are not included here, and there is an unbelievably deep pool of knowledge on the subject of ethics in business. This article is only a starting point, and I challenge other

“... [I]t's ultimately up to each of us to be responsible for our actions and to enforce ethical standards within our own business area of influence. ...”

APMP members – especially those working for larger firms – to submit articles that continue the ethical discussion started here.

Michael A. Scruggs is in his second term leading the APMP-National Capital Area Chapter as its president. He has almost 20 years of proposal management and capture management experience in the federal and state government marketplaces. With his expertise in the IT and healthcare-related fields, he leads capture and proposal activities from his base in the metropolitan Washington, D.C. area.



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The mission of the Association for Proposal Management Professionals (APMP) is to advance the arts, sciences and technology of new business acquisition and to promote the professionalism of those engaged in those pursuits.

We are extremely proud that we have grown into an internationally recognized association with membership and corporate sponsors from a diverse range of disciplines and industries who are committed to the pursuit of proposal excellence. Our journey has been one of promoting the professionalism of our members and shaping the future of the proposal profession throughout the world.

*APMP is a learning environment for both novice and seasoned proposal professionals. We offer professional symposia, conferences, and publications - the **Perspective** and the **Journal of the Association of Proposal Management Professionals**.*

Join our organization online at https://www.apmp.org/siteSpecific/customer/register_accountData.aspx. You can pay with a credit card or check (follow the online instructions). For a chapter affiliation, simply select the Greater Houston Chapter from the corresponding drop-down list.

Join us and discover how we can help you pursue new horizons in proposal excellence.

APMP Accreditation Begins with Solid 'Foundation'

By Michael Kent, AM.APMP

APMP Houston Communications Chair

To bring APMP's [Professional Accreditation Program](#) closer to home, the Greater Houston Chapter of APMP will be leading a dialogue for the benefit of our chapter members and other proposal professionals in our area.

Let me kick off this dialogue by giving you my perspective as someone who recently took the first step of APMP accreditation. That step starts with the APMP-Foundation™ Level, which tests a candidate's basic knowledge of proposal management best practices.

Assuming you meet [eligibility requirements](#), you are good to go to attempt that first step, which is taking a 75-question online multiple choice examination. You will have one hour to complete this open-book exam (but in advance, take the practice exam beforehand), and you must answer at least 42 questions right. Shortly after the exam, you will receive an e-mail with your "pass" or "fail" result.

Sounds easy, you say? Think again.

The pressure builds steadily from the moment you launch the online exam. No stop button is allowed; once you start, your one hour of allotted time continues to tick down faster than you realize. So let me advise everyone who is considering taking the exam that advanced preparation and test-taking efficiency will be critical success factors.

Download and become familiar with the [APMP Accreditation Glossary](#), a three-page document that lays out the common terms used in the exam. Exam questions come from the Lore International Institute's "[Proposing to Win](#)" seminar and Shipley Associates' "[Shipley Proposal Guide](#)." If you have been to a Lore or Shipley proposal workshop already, you are one big step ahead of the game.

Some people have taken APMP-Foundation™ exam preparatory workshops with positive results (see page 5 of this newsletter for details on one such workshop at the upcoming

APMP conference). However, I followed the advice of one proposal consultant by reading the "Shipley Proposal Guide" from cover to cover. I also spent the last two days before taking the exam reviewing the highlighted pen marks I had made throughout the book.

The preparation paid off. I moved as quickly as I could, first answering all the questions I knew. In the time remaining, I answered the remaining questions I had skipped over, referring to the Shipley book where needed.

In the end, I finished with about 15 seconds to spare, and my knowledge recall was good enough to pass the test and earn the moniker "AM.APMP" that now follows my name.

Michael Kent has been a proposal professional at EDS since 2001 and has 25 years of experience in proposal, technical, journalism, and public relations writing. As a proposal professional, he has managed or supported proposals to clients in the transportation, energy, healthcare, financial services, chemical, and manufacturing industries as well as government agencies.