

The Association for Proposal Management Professionals - Houston



Final Draft

Overcoming Hurricane Ike's Fury How Enterprising Houston Team Made Its Tight Deadline

Save the Dates and Follow the Links ...

- [Nor'easters 2nd Annual Fall Symposium](#), Thur., Oct. 23, Westford, Mass.
- [SoCal Training Day Conference "Proposal Tricks and Treats."](#) Fri., Oct. 24, Anaheim, Calif.
- APMP Houston Board of Directors Meeting, Wed., Nov. 5, 3010 Briarpark Drive
- [12th Annual Southern Proposal Accents Conference \(SPAC\)](#), Fri., Nov. 7, Atlanta, Ga.
- [APMP Houston Chapter Meeting](#), Wed., Dec. 3, 3010 Briarpark Drive

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Editor's note: The following article was submitted by APMP member Nancy Zoller, Marketing Coordinator for Houston-based [Brown & Gay Engineers, Inc.](#) She provides an account of how her proposal team overcame Hurricane Ike and the aftermath, which hit the Greater Houston area Sept. 12-14.

By Nancy Zoller

Shortly before Hurricane Ike's arrival, our firm was given the opportunity to submit a proposal to a client we'd worked hard to attract. Even with the short time allowed to prepare the document, we were excited to do it. Our



"[Hurricane] Ike tested our dedication and resourcefulness, and in that respect, we won!" – APMP member Nancy Zoller

Houston-based proposal team collaborated easily by phone and e-mail with the project team lo-

cated in three regional offices. Subconsultants had been identified and promised to send us necessary documents quickly. Everything was going smoothly and we were sure that making our short deadline would be a breeze.

Then Ike's approach toward the Houston-Galveston area became a reality. With time to prepare before leaving the office on Thursday, our team worked through several possible scenarios: we could turn the remainder of the work over to the project manager (a good engineer with little proposal experience); contract a writer

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Meeting Canceled; Board OKs Hurricane Relief Donation

With Hurricane Ike causing widespread property damage and leaving people without power for more than two weeks in some areas, the Greater Houston APMP Board of Directors decided to cancel the scheduled Oct. 1 meeting.

"I know that ... [it] has been an exhausting time for everyone," Greater Houston Chapter President Jeannette Waldie said in a Sept. 22 e-mail to members and nonmem-

bers alike. "For those of you who have suffered property damage or loss of home, our best wishes go out to you as you repair and rebuild."

As a token of support for the millions of people affected by Hurricane Ike, the Board of Directors voted to donate \$1,000 from the Greater Houston Chapter's general fund to the [Gulf Coast Ike Relief Fund](#).

Janice Scanlan, the scheduled guest speaker for Oct. 1 meeting, will deliver her presentation during a future chapter meeting. The next chapter meeting, scheduled for Wednesday, Dec. 3, will feature Mark Wigginton of [Shiplely Associates](#) as guest speaker.

Details about Mr. Wigginton and the Dec. 3 meeting will be published in the November/December edition of *Final Draft*.

From the Prez: Ike Forces Delay in Board Elections

To encourage members to volunteer for the Greater Houston Chapter of APMP Board of Directors, we were extending the deadline for elections to the October meeting. As you all now know, we canceled that meeting to allow our members time to recover from Hurricane Ike. As a result, new Chapter board officers will be elected at the December meeting. Last year, we revised the bylaws to provide staggered terms for positions.

The board positions that are up for election this year are:

- **President:** Nominated – Jeannette Waldie
- **Program Chair:** Nominated – Open
- **Treasurer:** Nominated – Fritz Rumscheidt
- **Communications Chair:** Nominated – Open

There is still time to step up and join a great bunch of folks to make the Greater Houston Chapter one of the top chapters within APMP.

Speaking for me, serving on the

board has been one of the most rewarding things I have done. None of the positions are especially time consuming, as the whole board pitches in and helps. We have a great time. Please consider joining us! Nominations will be accepted from the floor.

I'm also happy to announce that the [APMP Forum](#) is now up in the members area of the APMP Web site. Included in the APMP Forum area is a place for Greater Houston members to ask questions from fellow members, post

announcements and find information on Houston events. So log on, create a user name and join us in a dialog.

See you soon!

Regards,



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

Purge White Edges from Brochures and Other Tricks

By David Wallis

Pick up a professional brochure or magazine, and you'll notice that printed images and colors go all the way to the edge of the paper. Unfortunately, most office printers are not designed for "full-bleed" printing and leave a white edge around all four sides of a document.

Since documents such as Executive Summary brochures tend to look much more polished without this white space, a good trick is to simply trim it away with a paper cutter. Be sure to do any necessary folding after cutting the edges away.

Text Justification: Left or Full?

Everyone has a different opinion about whether paragraph text should be fully justified or left-

justified only. Newspapers and magazines often use such small and dense text that full justification works well; however, for typical office documents and tenders, left-only justification is often much better. Readers can sometimes have difficulty keeping their place with fully justified text.

In addition, narrow columns tend to require excessive spacing between words to achieve full justification. This spacing can lead to un-professional looking "rivers" of white space running through your text.

Make PDF Files Retain Hyperlinks

Have you ever converted a document to PDF and noticed that your hyperlinks no longer work? If so, there is a simple solution.

When you use the "File, Print, Adobe Acrobat" method of creating a PDF, advanced features such as hyperlinks are not preserved because you are essentially making a print capture. The alternative is to use the "Convert to Adobe PDF" macro button that should be installed on the toolbar. This macro is much more sophisticated than just "printing" to PDF and will retain hyperlinks.

Using Drawing Guides in PowerPoint

One of the main keys to achieving a professional layout in PowerPoint, whether you are creating presentation slides or printable brochures, is to follow an alignment "grid." PowerPoint makes this easy through its drawing guides.

Go to "View," "Grid and Guides," then check "Display drawing guides on screen." This will show non-printing guides on the screen which can be moved around to help you align things.

For example, if you are creating a brochure to be folded, you can drag the guide to the exact center of the page as a fold reference. If you have several photos or text boxes, you can use drawing guides to help position them evenly. To create additional guides, simply hold down CONTROL and drag a line to duplicate it.

What Can You Do With the Windows Logo Key?

For those of you with Windows operating systems and keyboards, pay attention to the

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Holding the Line: Ethics and Proposal Management

By Jeannette Waldie, APM, APMP
Greater Houston APMP Chapter President

As we learned in the August presentation given by Dr. Ann Jennings, developing proposal and marketing materials that ethically convey our company or client's capabilities can be a challenge. During my career I have been asked to use a resume of a nonemployee not under contract or purposely exaggerating a role on a project.

The Association of Proposal Management Professionals (APMP) has a Code of Ethics to help its members deal with ethical dilemmas. They are:

- 1** Comply with rules, government regulations, and laws in their respective countries, as well as other appropriate private and public regulatory agencies.
- 2** Ensure compliance with all rules concerning interaction with clients and Government liaisons.
- 3** Protect sensitive information and comply with all legal requirements for the disclosure of information.
- 4** 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.



Dr. Ann Jennings (center) talks with some University of Houston-Downtown students. Dr. Jennings was the guest speaker at the Aug. 6 Greater Houston Chapter of APMP membership meeting. She delivered a presentation on ethics at the meeting.

- 5** Ensure that a mutual understanding of the objectives, scope, work plan, and fee arrangements has been established before accepting any assignment.
- 6** Represent the proposal profession with integrity in their relationships with employers, clients, colleagues, and the general

public.

- 7** 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.

If you ever have to deal with an ethical issue, these guidelines can help you find a way.

Purge White Edges from Brochures and Other Tricks

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Windows logo key. Holding down this key, usually located near the bottom left of your keyboard, prompts many shortcuts when used with the following keystrokes:

- **L** – Lock the computer
- **Break** – Display the System Properties dialog box
- **D** – Show the desktop
- **M** – Minimize all windows
- **Shift+M** – Restore minimized windows
- **E** – Open My Computer
- **F** – Search for a file or folder
- **Ctrl+F** – Search for computers
- **F1** – Display Windows Help
- **R** – Open the Run dialog box
- **U** – Open Utility Manager
- **Logo Key Only** – Display or hide the Start menu

David Wallis is a senior proposal manager for [Halliburton's](#) Global Business and Technical Solutions team. He has created and regularly delivers proposal training throughout Halliburton. He has more than 10 years of experience with large oilfield services tenders and is a member of APMP's Houston Chapter.



2007-2008 Board of Directors

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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.

Enterprising Proposal Team Overcomes Ike's Fury

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outside the Gulf Coast area to complete the work; scrap the proposal (but we *really* wanted this opportunity); or copy all the files needed and take them home with us.

We each took files home with us – sending copies to another office just in case we had no office to return to afterward. On Friday evening, the storm hit and most of the region was left without utility services. By Sunday evening power, cell phone and Internet service was available in limited parts of the city, but our office building had suffered damage and occupancy would not be possible for several days.

On Monday morning our project manager in North Texas asked to see a draft copy by 5:00 that evening. As much as we would have liked to comply, we had to explain about our utility

outages and that our work would be slower than usual. The draft would be ready the following morning.

Unfortunately for our marketing director, she was stuck with most of the work, fielding dozens of calls and e-mails and making many text and format changes. She even recreated the org chart after the project team was drastically changed at the last moment. Sharing a home computer with her husband, she would revise a draft and e-mail it to me for editing. And I'd send it back. And she'd send it to the project manager. And he'd send more revisions. Sometimes e-mail arrived quickly; often there was a lag time of several hours.

By Wednesday morning, though, writing was complete and our graphic designer e-mailed the files to a print shop 150 miles away to do the production work we'd normally do ourselves. We met our deadline with hours to

spare.

I have to admit how proud I am to work with the people I do. There was no second thought about completing a project we'd committed to, regardless of the hardship or inconvenience. Hopefully this submittal will result in a win, but maybe it won't. Regardless, Ike tested our dedication and resourcefulness and in that respect, we won!

Chapter Member Notes

Jeannette Waldie recently earned the [APMP-Practitioner™ Level](#) of accreditation, the second of three stages.

To earn this level, candidates complete a professional self-assessment, which is then evaluated by an assessor and a reference selected by the candidate.