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Proposal Editing Workshop

Day 1

OST Bid & Proposal Academy Course

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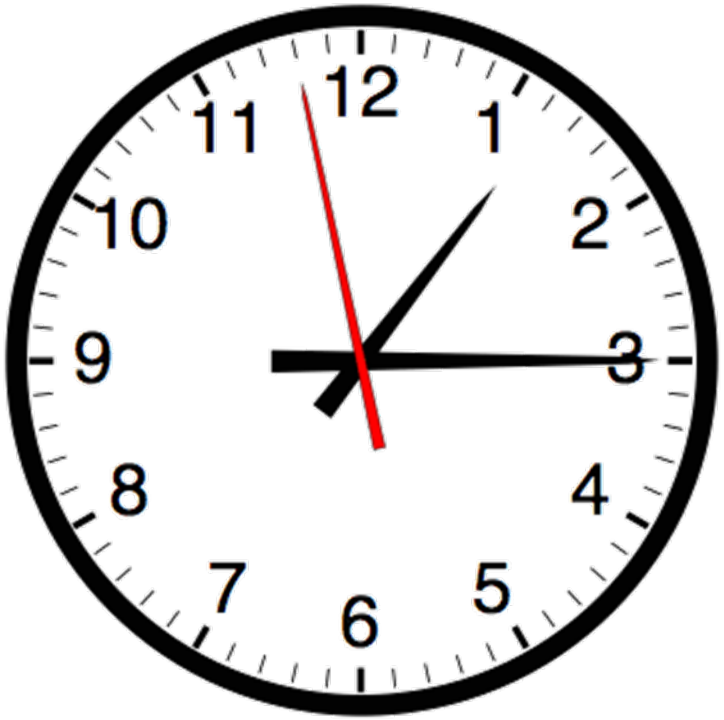
Agenda

- 09:00 – 10:30 – Training
- 10:30 – 10:45 – Break
- 10:45 – 12:00 – Training
- 12:00 – 13:00 – Lunch
- 13:00 – 15:00 – Training
- 15:00 – 15:15 – Break
- 15:15 – 17:00 – Training



- ***Please, give yourself the benefit of focus and limit the use of cellphones and emails to breaks***

Introduction and Learning Objectives

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This course will teach you to:

- Understand the proposal editor's role and key attributes
- Understand compliance
- Assess materials and estimate resources required to edit sections
- Optimize editing time and workflow in a team of editors to save resources
- Use electronic editing tools and professional hard copy markings
- Avoid typical editing traps and master editing techniques to ensure perfectly-clean copy
- Edit content for clarity, compliance, customer language, accuracy, and persuasiveness
- Edit content while preserving the author's meaning
- Add more substance to every proposal you edit
- Reduce page count without sacrificing content
- Adhere to the requirements of the Plain English Act
- Automate proposal editing to increase efficiency
- Edit resumes and past performance for length and add compelling, relevant language
- Catch showstopper mistakes
- Improve readability while satisfying technical evaluators
- Effectively track workflow

How to Maximize the Learning Process

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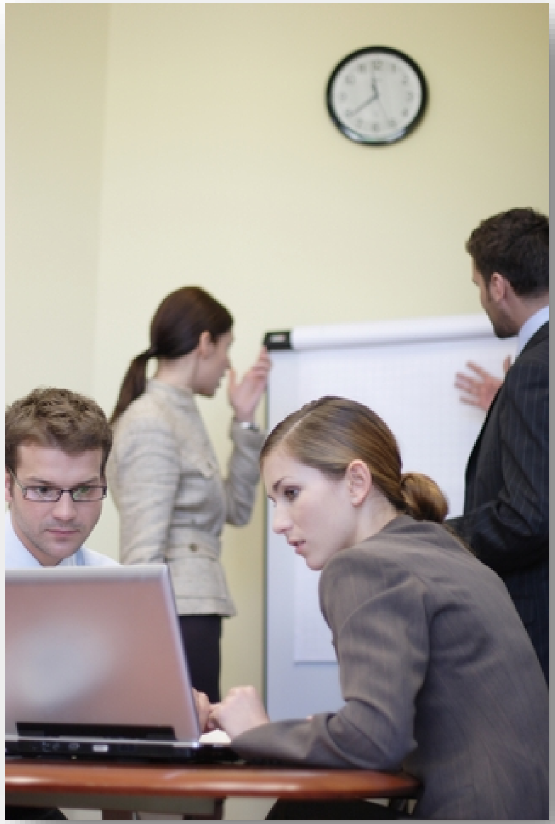
- How adults learn:
  - Understand WHY things work a certain way
  - Participate in exercises
  - Ask questions
  - Relate the material to your own experience
  - Take notes
- Bring up topics of interest to your job
- Move around during exercises



Introductions: Who's Who?

Please share:

- Your name and position
- Your years of experience in the industry and as a writer/editor
- An interesting fact about your life or career
- What you are looking to get out of this training

What it takes to be a stellar proposal editor

Module 1

The Editor's Role in the Proposal Lifecycle

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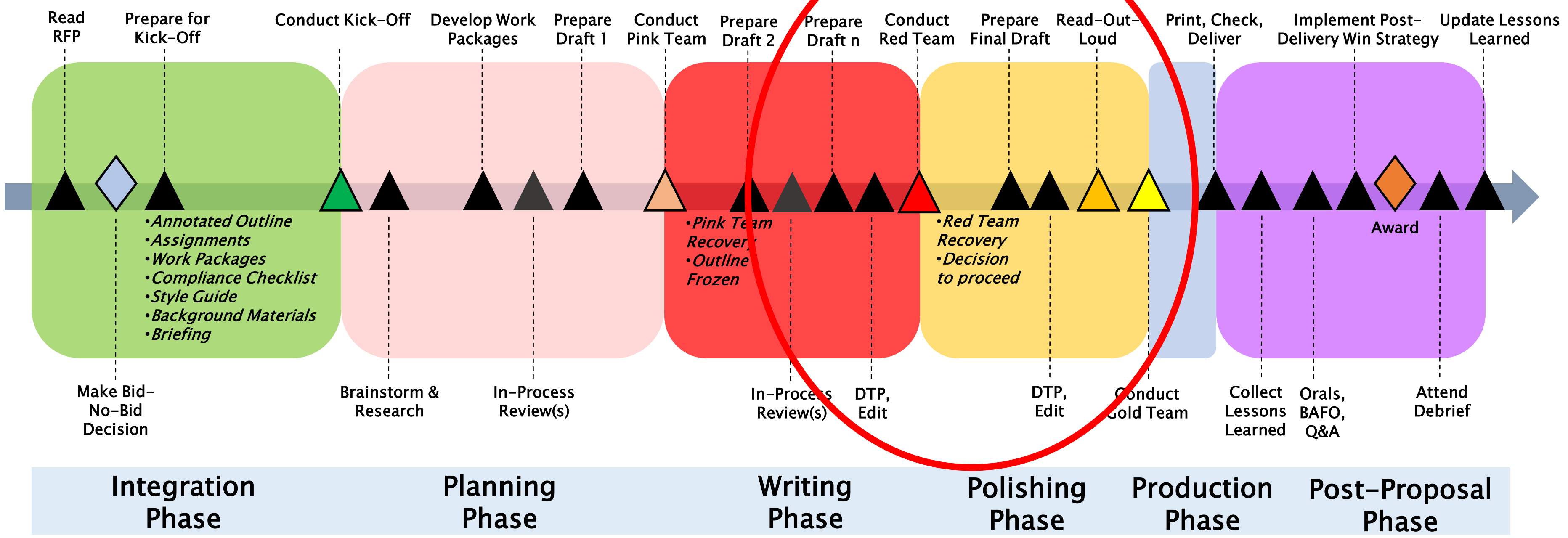
By the time you get there, most of the content work has already been done; your job is to polish the proposal.



Attributes of a Great Proposal Editor

Great proposal editors are not born; they are made from a variety of attributes and skills specific to this field.

- Familiar with the rules of proposal compliance
- Knowledgeable of the proposal process
- Able to work quickly against tight deadlines
- Dives into the content enough to pick up bad proposal language and even stale boilerplate leftovers
- Has a thorough understanding of spelling, grammar, and mechanics of the proposal layout
- Pays meticulous attention to detail
- Understands how to preserve the meaning of a sentence or paragraph while changing the wording/structure
- Communicates feedback diplomatically

The 5 Cs of Editing Proposals

These five elements of editing are necessary for the highest-quality documents:

- Consistency – Using the same style for every occurrence
- Clarity – Making the meaning of a passage apparent through organization and simplicity of language, for ease of evaluation
- Compliance – Checking carefully to ensure that every necessary part of the document is present and fully addressed
- Conciseness – Ensuring brevity to maximize information provided when the page count is tight
- Correctness – Verifying the accuracy of all facts and claims to avoid legal and performance troubles down the line

Don’t Be a Schoolmarm

Learn how to give constructive feedback, be diplomatic, and foster teamwork .

- Everyone knows the stereotype of the mean, judgmental editor who disparages and chides others for their mistakes; don’t be that person! The authors who came before you put in a lot of hard work to get the proposal off the ground.
- Treat your fellow team members like adults, and couch your feedback accordingly.
  - Make sure your comments are polite, with no sneering language or making fun of others.
  - Don’t assume that something is wrong just because it doesn’t make sense to you; ask for clarification, and give others a chance to discover their mistakes themselves.
  - If an author is consistently incorrect about something, keep an eye out for it in your own work and don’t point it out or bring it up.
  - Air your concerns calmly and rationally, without singling out individuals, in team meetings.

What Would You Change About This Comment?

Although you may be absolutely correct and your work may be completely on point, that doesn't mean that you should forget about diplomacy.

(NDI) technologies. We continuously strive to build strong, long term relationships based on mutual trust, respect, and commitment.

Our goal is to expand our knowledge of Engineering, Logistics and Program Management through continuous training and partnering with Government agencies and industry partners that share similar strengths. We aim to have a healthy, successful company that is a leader in customer service and achieves a loyal customer following.

Our ~~well~~ well-defined Task Order Management and ~~active~~ Quality Assurance processes allow ACME to continuously improve support to our customers while developing~~,~~ ~~low~~ low-risk, best-value solutions~~,~~ on time and within budget.

ACME provides a full range of enterprise logistics service solutions (Life Cycle Management and Acquisition Logistics) which includes strategic, operational and tactical logistics for all ten

Comment [h3]: Delete this self-centered paragraph. I don't believe they care what we strive for and what's in it for us.
It also makes us sound like we are not that competent or trustworthy. You are being brought in as an expert, so you shouldn't talk about expanding your knowledge in this context.
Are you not healthy and successful already?
Do they care about other customers?

Proposal Editors' Impact on Proposal Quality

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How can an editor have the greatest impact on proposal quality?

- An error doesn't invalidate a quality approach and competitive pricing…or does it?
- Even if the evaluation criteria don't specifically include grammar and spelling, a proposal is not a proposal until an editor has been through it.
- Half of the evaluators won't notice the mistakes, but the other half will equate errors (consciously or unconsciously) to:
    - Stupidity and lack of education
    - Indication of performance problems down the road
    - Negligence and lack of attention to detail
    - Lack of professionalism

- In some cases, a proposal editor may be the most important person on the proposal and responsible for rescuing the bid.

Setting up for Success

Module 2

Editor's Tool #1: The Style Guide

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Consistency is the name of the game in editing; it becomes challenging in a proposal document with multiple authors and sources of information.

- Style guide prescribes the 'styles' or standard format for the presentation of information
  - Removes the guesswork from deciding which form of the word we should use (ex. "use" vs. "utilize"); it's a no-brainer once the decision is made.
  - *Not to be confused with a style sheet, which would impact the look and feel of your proposal.*
- Prescribes usage, punctuation, and formatting rules to help ensure consistency among authors and editors throughout the proposal document
- May even be used to convey brand and consistency across proposals
- Establishes conventions for a specific proposal
- When provided to the proposal team:
  - Makes an editor's life easier
  - Enables an editor to focus on content rather than the minutiae

Some of the Questions a Style Guide Answers:

Should 'Website' be written with a capital 'W' and as all one word rather than as 'web site', 'Web site' or even 'website'?

What is the correct way to write it—'Governmentwide' or 'Government-wide'?

Do we use an Oxford comma? (e.g. This, that, and the other thing.)

Should it be Team Acme or the Acme Team—and should the word "Team" be capitalized or not?

Working with GPO, Chicago, and Other Style Guides

Understanding the importance of correct and consistent style is your first task .

- Some common style guides are available online:
  - GPO: www.gpo.gov/fdsys/pkg/GPO-STYLEMANUAL-2008/pdf/GPO-STYLEMANUAL-2008.pdf
  - Chicago: www.chicagomanualofstyle.org/16/contents.html
  - Gary B. Larson's Editorial Style Manual (for small businesses who don't use a particular style guide): http://garbl.home.comcast.net/~garbl/stylemanual
- **The Shipley style guide is the most directly-applicable to proposals, but it is no longer in print; most shops use Chicago instead.**
- Often, style guides contain much more information than you actually need, so it's best to compile key information into your own style guide.

Creating a Proposal-Specific Style Guide for the Team

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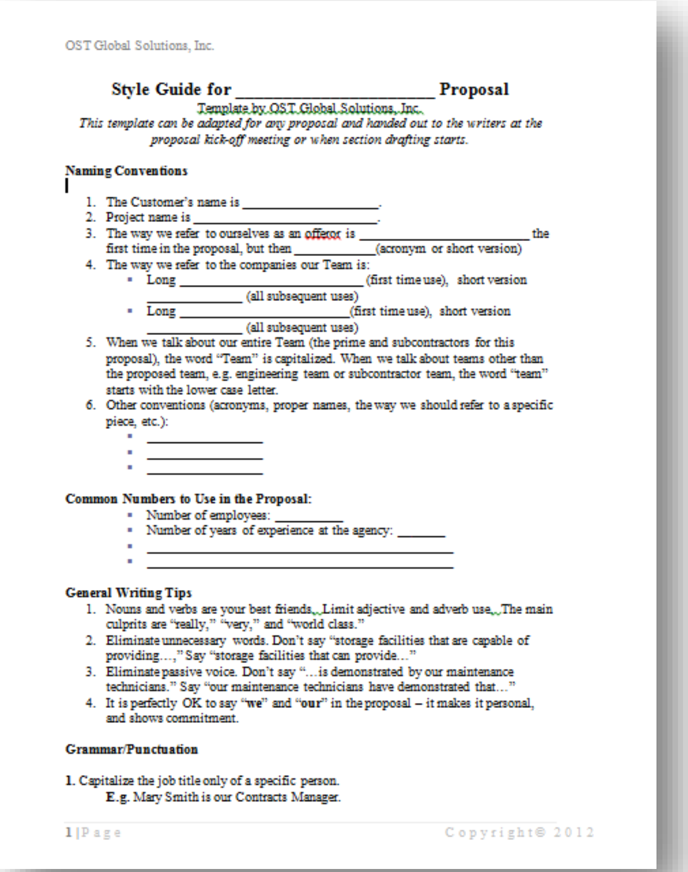
In a large proposal with multiple writers and even multiple editors, creating a proposal-specific style guide is an invaluable step to save precious time in final proposal phases.

- The rule is keep it brief; your style guide should be no longer than 5 pages.
- Introduce team members' names, conventions, the customer's name, key quantities, etc.
- Add important information to remember regarding:
  - Punctuation
  - Word Usage
  - Formatting
  - Grammar
  - Style
- Ensure that key terms and acronyms from the customer are included.
- Note that sometimes usage that is not acceptable in a newspaper is acceptable in proposals, such as:
  - 'And/or'; 'to include'; 'over' instead of 'more than'; 'less' instead of 'fewer'
  - 'Acceptable', of course, doesn't mean it's good English



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Style Guide for ____________________ Proposal

Template by OST Global Solutions, Inc.

This template can be adapted for any proposal and handed out to the writers at the proposal kick-off meeting or when section drafting starts.

Naming Conventions

1. The Customer's name is ____________________.
2. Project name is ____________________.
3. The way we refer to ourselves as an offeror is ____________________ the first time in the proposal, but then ____________(acronym or short version)
4. The way we refer to the companies our Team is:
   - Long ____________________(first time use), short version ____________ (all subsequent uses)
   - Long ____________________(first time use), short version ____________ (all subsequent uses)
5. When we talk about our entire Team (the prime and subcontractors for this proposal), the word "Team" is capitalized. When we talk about teams other than the proposed team, e.g. engineering team or subcontractor team, the word "team" starts with the lower case letter.
6. Other conventions (acronyms, proper names, the way we should refer to a specific piece, etc.):
   - ______________
   - ______________
   - ______________

Common Numbers to Use in the Proposal:

- Number of employees: __________
- Number of years of experience at the agency: _______
- ______________________________
- ______________________________

General Writing Tips

1. Nouns and verbs are your best friends. Limit adjective and adverb use. The main culprits are "really," "very," and "world class."
2. Eliminate unnecessary words. Don't say "storage facilities that are capable of providing…," Say "storage facilities that can provide…"
3. Eliminate passive voice. Don't say "…is demonstrated by our maintenance technicians." Say "our maintenance technicians have demonstrated that…"
4. It is perfectly OK to say "**we**" and "**our**" in the proposal – it makes it personal, and shows commitment.

Grammar/Punctuation

1. Capitalize the job title only of a specific person.
E.g. Mary Smith is our Contracts Manager.

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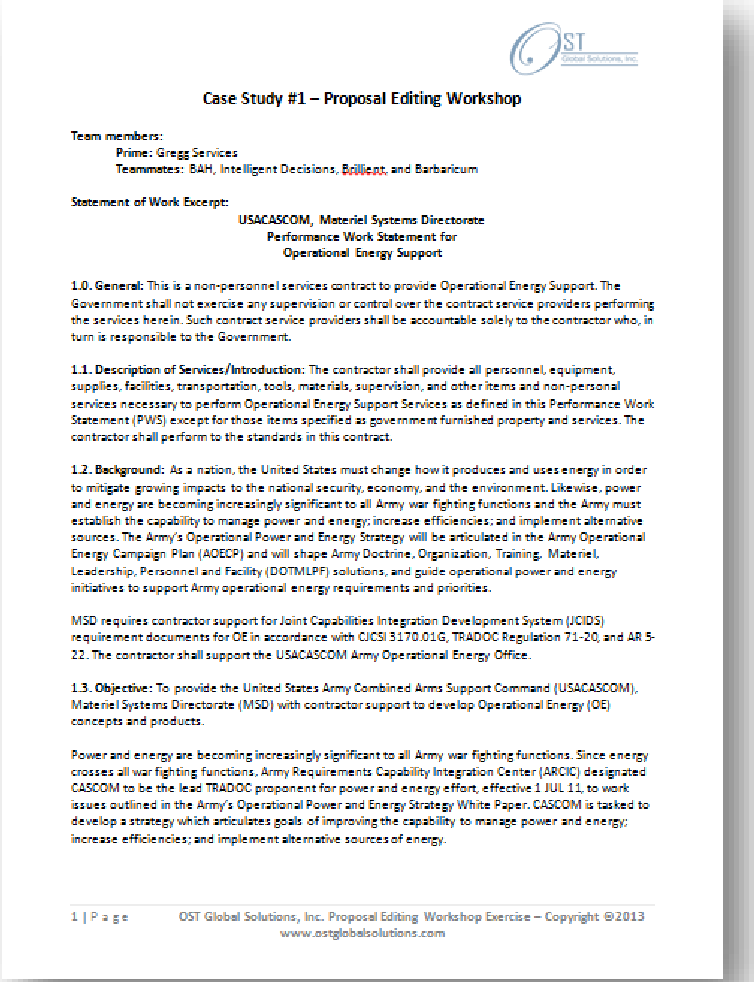
Exercise

Customize the style guide template to build a sample style guide

- Think about what elements you need to specify to your editors to ensure consistency.
- Determine: What word usage and conventions stand out, and need to be used the same way in the proposal?
- What style guide should you follow with this customer?
- Decide what to keep and what to leave out.
- Customize the style guide to the extent possible with the available information.



Case Study #1 – Proposal Editing Workshop

Team members:
Prime: Gregg Services
Teammates: BAH, Intelligent Decisions, Brilient, and Barbaricum

Statement of Work Excerpt:

USACASCOM, Materiel Systems Directorate
Performance Work Statement for
Operational Energy Support

1.0. General: This is a non-personnel services contract to provide Operational Energy Support. The Government shall not exercise any supervision or control over the contract service providers performing the services herein. Such contract service providers shall be accountable solely to the contractor who, in turn is responsible to the Government.

1.1. Description of Services/Introduction: The contractor shall provide all personnel, equipment, supplies, facilities, transportation, tools, materials, supervision, and other items and non-personal services necessary to perform Operational Energy Support Services as defined in this Performance Work Statement (PWS) except for those items specified as government furnished property and services. The contractor shall perform to the standards in this contract.

1.2. Background: As a nation, the United States must change how it produces and uses energy in order to mitigate growing impacts to the national security, economy, and the environment. Likewise, power and energy are becoming increasingly significant to all Army war fighting functions and the Army must establish the capability to manage power and energy; increase efficiencies; and implement alternative sources. The Army's Operational Power and Energy Strategy will be articulated in the Army Operational Energy Campaign Plan (AOECP) and will shape Army Doctrine, Organization, Training, Materiel, Leadership, Personnel and Facility (DOTMLPF) solutions, and guide operational power and energy initiatives to support Army operational energy requirements and priorities.

MSD requires contractor support for Joint Capabilities Integration Development System (JCIDS) requirement documents for OE in accordance with CJCSI 3170.01G, TRADOC Regulation 71-20, and AR 5-22. The contractor shall support the USACASCOM Army Operational Energy Office.

1.3. Objective: To provide the United States Army Combined Arms Support Command (USACASCOM), Materiel Systems Directorate (MSD) with contractor support to develop Operational Energy (OE) concepts and products.

Power and energy are becoming increasingly significant to all Army war fighting functions. Since energy crosses all war fighting functions, Army Requirements Capability Integration Center (ARCIC) designated CASCOM to be the lead TRADOC proponent for power and energy effort, effective 1 JUL 11, to work issues outlined in the Army's Operational Power and Energy Strategy White Paper. CASCOM is tasked to develop a strategy which articulates goals of improving the capability to manage power and energy; increase efficiencies; and implement alternative sources of energy.

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How to Quickly Grasp the Structure of the Solicitation

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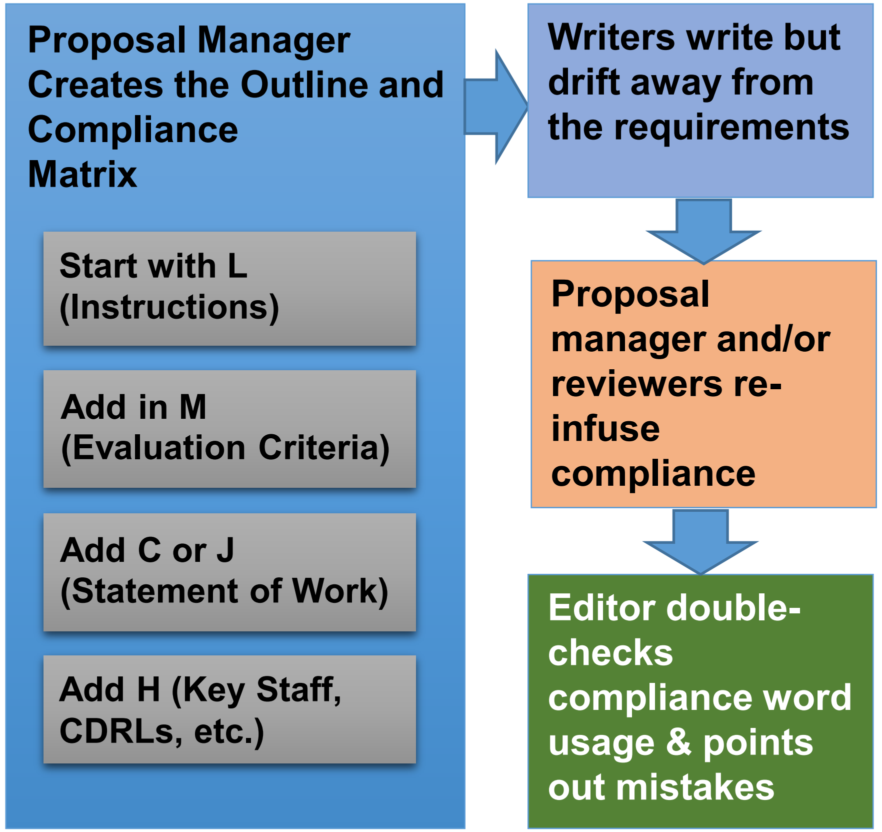
Compliance is more than just responding to every shall statement from the RFP in a Word document and hoping for the best; you have to see the proposal through the customer's eyes.

- **Compliance must be part of the editor's repertoire, as s/he may be the most detail-oriented and observant person on the team.**
- **An editor double-checks the proposal manager's work on compliance.**
- **The first section to look at is the preparation instructions, sometimes called Section L; this is where you get your top-level structure.**
- **The evaluation factors, or Section M, may serve as the clarification for the preparation instructions or even dictate the order of sections in select cases.**
- **The statement of work is the last piece of the puzzle. It can come in the form of a PWS, SOW, SOO, or tasks; it tells you what the work is.**
  - **The statement of work maps to the preparation instructions.**
- **Although you don't outline the proposal, you do need to make sure that everything that needs to be in each section is there.**



How Proposal Managers Build a Compliant Outline

Although this course is not focused on proposal management and outlining, you have to understand the basics of outlining mechanics, as this structure impacts your work.

- **Open a spreadsheet in Excel or a Word Document.**
- **Begin by listing any volumes called for in the instructions.**
- **Add in headers for top-level sections, such as the Technical Approach or Management Approach.**
- **Create headers under each top-level section to flesh out the preparation instructions.**

L	M	C	Other	Section #	Section Title	Page Limit	Potential Score	Responsible	Status
L.5					Outer Wrapping				
Volume I - Business Proposal									
L.3.1.1 (1)					Cover Sheet	1	10	Jones	
L.3.1.1 (2)					Signed Affirmation of Acceptance of Sections B, D, E, F, G, H, and I of solicitation	1	25	Smith	
L.3.1.1 (3)					Section G.2	2	15	Jones	
L.3.1.1 (4)					Section K	2	16	Smith	
L.3.1.2					Team Responsibilities Chart	2			
L.3.1.3 (a)	M.3 (c)				Small Business Subcontracting Plan	–			
L.3.1.3 (b)					First-Tier Subcontractors	–			
L.3.1.4					Business/Pricing Questionnaire	–			
L.3.1.5					Labor Category Classification Tables (B-2 through B-4)	–			
L.3.1.6	M.3 (a), M.3 (b)		B		Pricing Tables from Attachment (1)	–			
L.3.1.7					Price Support Information (Information Other Than Cost or Pricing Data)	–			
Volume II - Technical Proposal									
L.3.2 (a)					Table of Contents				
L.3.2.1				1	Executive Summary	4			
L.3.2.2	M.2 (a)			2	Technical Approach	140	45		
L.3.2.2 (a)	M.2.1 (1)			2.1	Demonstrated Ability to Cover All Work				

- **Weave in the evaluation factors; decide if they should go in as separate headers, or if they should be addressed inside a section.**
- **Determine how the preparation instructions and statement of work fit together; does the statement of work get addressed entirely in one section or in different sections throughout?**
- **Understand where your section fits in the proposal, before you dive into the text.**

What Compliance Looks Like in Text

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Compliant text will use the same words as the customer, without regurgitating them verbatim; it is a way of really answering the mail and making it easy for the evaluators to find where you have done so.

RFP Requirements Language:

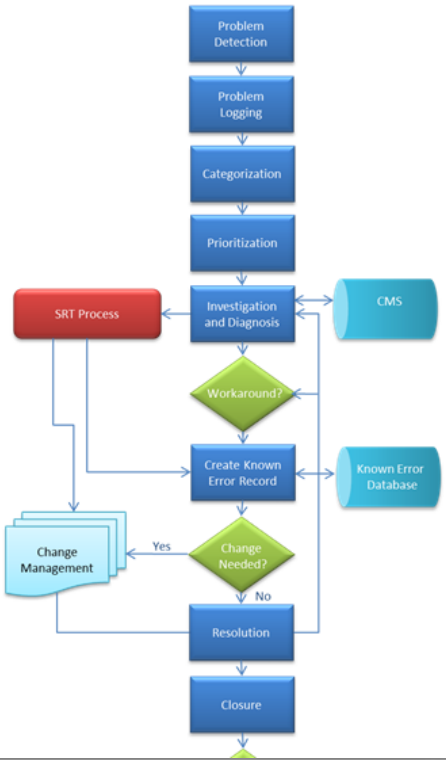
1.3 Monitor and evaluate database and software problems to determine cause. Coordinate problem identifications and resolutions with personnel as identified in the Task Orders.

Section Text with Compliance Words

TTC will provide single, coordinated cradle-to-grave stewardship for database and software incidents and problems experienced in the NEC-R environment. Our support is ISO 9000-accredited and based on ITIL best practices. We will serve as receiver and provider of incidents through the BMC Remedy 8.0 problem management system. Our focus on problem management will address the problem at its core, and success will be defined as minimizing the adverse effect on NEC-R's customers while proactively preventing future occurrences.

We will quickly identify database and software problems arising within the NEC-R database environment. We will discover these incidents using daily monitoring tools and track them within the BMC Remedy problem management system. Remedy is integrated with NEC-R enterprise framework, enabling fast evaluation, investigation, diagnosis, and Root Cause Analysis (RCA) of all incidents. Integration with Remedy will facilitate recording, assessment, resolution, and error closure.

Mr. Doe, together with his government counterpart as identified in the Task Orders, will mutually define the severity and priority designation based on criticality



Estimating your Effort and Time

Module 3

An Editor's Challenge

The way you scope and start the assignment will often determine its outcome.

- Estimating the depth of the effort:
  - Just how bad is the material?
  - How many passes will it take?
  - How much rewriting does it require?
- Determining how much time the effort will take
- Prioritizing and triaging when the deadlines are extreme
- Structuring the effort correctly so that you can accomplish the work with a team of editors

Sizing the Effort

Ability to judge the depth of the work required stems from experience knowing what is good (and what's bad) in proposal writing; it can be learned.

- When you first receive the document, skim it to assess quality, structure, language, spelling, grammar, and aesthetics.
- Does it appear the author thought through the material, or is it gobbledygook? Is the writing comprehensible?
- Do a quick compliance check to see if the text is responsive to the customer's requirements.
- Look to see if you recognize the wording in the headers from the RFP, or if the customer has invented their own wording.
- Skim the text to look for well-balanced paragraphs.
- See if the text reads like boilerplate content.
- Assess whether the document is written evenly—do some sections look complete while others do not? Are there any holes?

Assessing Material for Content, Organization, and Writing Style

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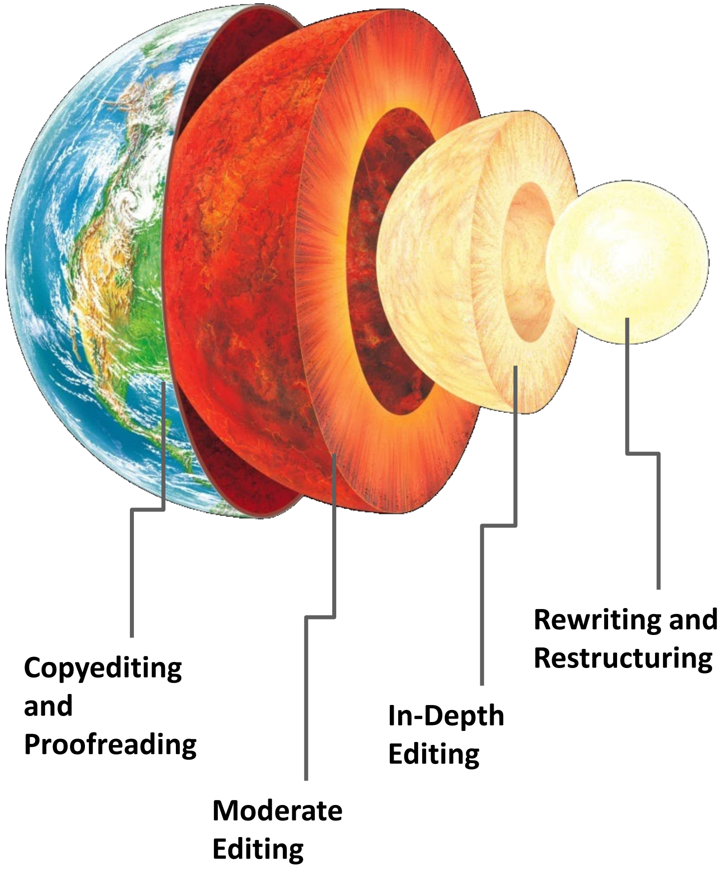
Use these slides as a checklist of what to pay attention to when assessing proposal quality.

- Scan the text to see how dense it is and run a readability check.
- Determine if a proposal has a multiple personality disorder from numerous contributors.
- Look for benefits language and note if it is lacking.
- Check if the document is over the page count. (Check against the RFP or ask the proposal manager.)
- Check graphics to make sure they are true to size and referenced in the text.
- Check if the spelling and grammar look OK on a quick pass or if you spot numerous issues right away.
- Glance over the pages looking for irregularities in the margins or obvious variations in font size, large blocks of empty white space on the pages, misaligned graphics, missing action captions, and so on.

Levels of Editing

Editing assignments have to specify the level of editing required—i.e. the depth you need to go to before you get the proposal document in shape.

- Your assessment and/or proposal manager's requirements determine the depth (or level) of the editing effort.
- Note whether the document requires more than one level of editing. Does it just need polishing and clarification, or are there serious structural problems?
- What is the deadline, and can you fit in the level of editing that the document requires?
  - If there are too many issues, you may need to bring in another editor to assist you.
  - If this is not possible, then consider:
    - How to build a workflow of multiple editing passes for yourself
    - How to triage, addressing the most egregious problems first



Rewriting and Restructuring

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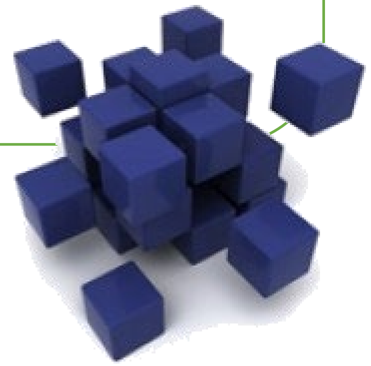
Technical writing skills are required to rewrite and restructure, drawing on an understanding of technical subjects and the ability to work with SMEs.

- **Necessary if proposal is in extremely rough shape**
  - The SMEs writing sections are non-native English speakers or simply terrible writers
  - Writers added unaltered boilerplate content from old proposals
  - The outline is non-compliant or terribly put together
- **Activities in this type of editing may include:**
  - Rewriting confusing and disorganized text
  - Reorganizing sections and moving the paragraphs around
  - Adding section summaries, benefits, and proof language
  - Restructuring tables and revising or reorienting graphics
  - Improving quality and tone

Rewriting/restructuring is the most time- and effort-intensive editing type; a typical editor can produce 8 to 10 pages a day or *even less* if the text requires complete rework.

1 page per hour or 500 words per hour



In-depth Editing

Content being "there" means it is customer-ready; the percentage-readiness estimate comes with experience looking at finished proposals versus drafts.

- **In-depth editing happens when the content is about 70-80% there, the outline has been properly developed, and the authors working on the proposal are actively contributing content.**
- **Typical in-depth editing activities include:**
  - Ensuring clarity of expression, completeness of discussion, and logical development of ideas
  - Adding or making a detailed request to SMEs for needed material
  - Deleting unnecessary or redundant material
  - Correcting awkward sentence structure and eliminating ambiguities

A typical editor can produce between 10 to 16 pages a day of in-depth editing

1.25-2 pages per hour or 625-1000 words per hour

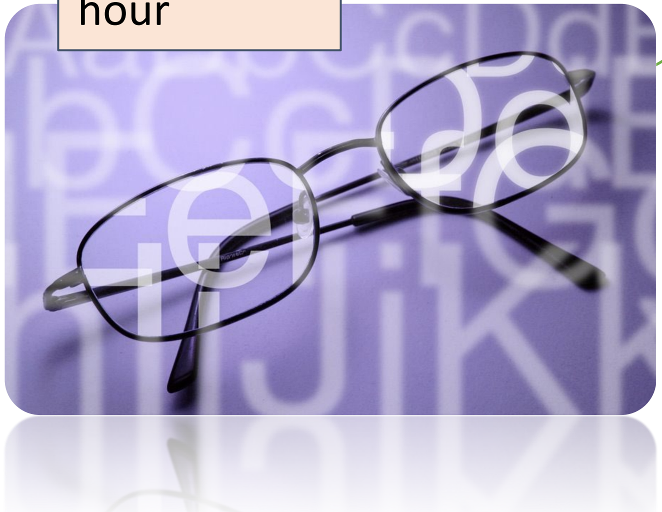
Moderate Editing

Moderate editing is the most typical type of editing that happens on a proposal.

- **Moderate editing is the typical post-Red Team editing level.**
  - All content is present in the document
  - An editor has done an initial pass on the document to polish up the most awkward, disorganized, or unclear prose
  - Includes not just body text, but figures and tables as well
- **Activities include:**
  - Improving clarity and conciseness at a higher level
  - Carefully checking graphics for content, correctness of spelling and grammar, font size compliance, and layout

Most editors can produce 24 to 32 pages per day of moderate editing

3-4 pages per hour or 1500-2000 words per hour



Copy Editing and Proofreading

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Copy editing requires the least amount of technical knowledge, but it calls for attention to detail and flawless control of the English language.

- **Copy editing is a lighter edit that emphasizes aesthetics and typo-free presentation over content.**
- **Activities in copy editing include:**
  - Checking text and figures for accuracy of headings, figure citations, and document references
  - Consistency of font size, spacing, formatting, sequencing, and organization
  - Correctness of grammar, spelling, punctuation, and sentence structure
- **Proofreading involves:**
  - Checking the document against the redlines to ensure all changes were entered correctly and that no new errors were introduced
  - Marking any errors not caught during copy editing
  - Ensuring document formatting is compliant

An average editor can copy edit or proofread 40 to 64 pages a day

5-8 pages per hour or 2500-4000 words per hour

Estimating Time & Effort Required for the Workload

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Do the math and be conservative, but not so conservative that your "customers" deem you slow or turn you away; remember that things often take longer than planned.

- **Deduct any standard sections, auto-generated TOC, scanned documents, and other pages not requiring much editing.**
- **Divide the number of pages left by the number of pages per hour an average editor can edit.**
- **If you are faster than that, reduce the estimate.**
- **Figure in the number of passes, since you won't catch all mistakes on the first pass.**
    - The second pass should be at the lower level of depth and higher speed
        - **Tip:** Plan to switch fonts, do a hard copy pass, or read in PDF and make live edits in Word.
    - Plan to break away from a specific section for at least a few hours after the first pass.
- **Account for the fatigue factor negatively impacting speed if you go over 10 hours per day.**

Estimating Tips:

- Bottom-up estimate is usually higher.
- Design your editing solution to price—see what you can do with what the "customer" has given you in the time and budget they have allotted to your work.

Measure Your Speed: Calculate a rough time estimate based on a word count and your assessment of editing level; use one of the benchmark ranges as a starting point.
Start editing, keeping track of the number of pages you mill per hour or sitting.
Compare your measurements against the benchmarks.
Discover through trial and error your **personal editing speed**—i.e. the number of words your brain can process in an hour or a day.

Optimizing Your Editing Time to Do More With Less

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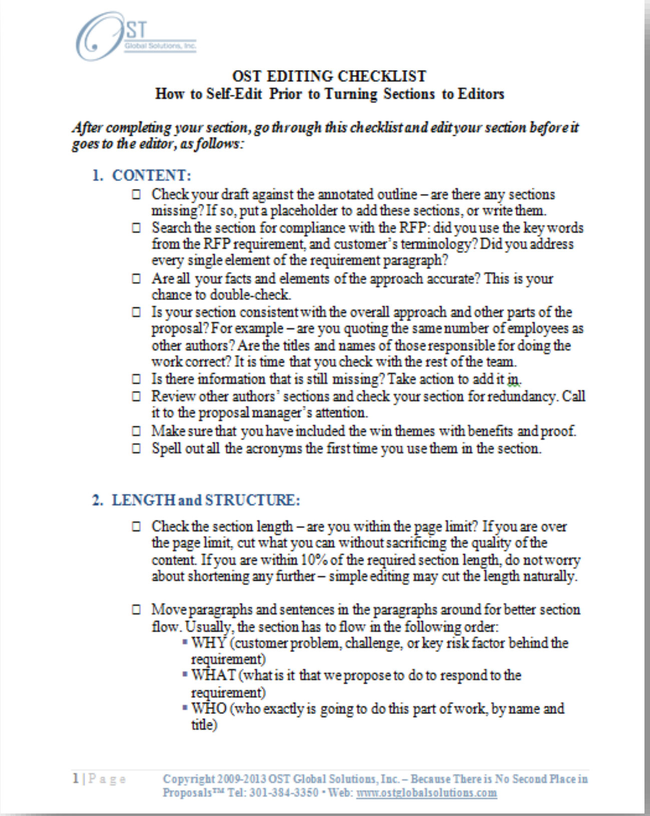
The minimal proposal editing tasks are to ensure that the document addresses every RFP element; that the font, margins and formatting are compliant; and that there are no spelling or grammatical errors.

- Determine how much you can do to the document given the budgeted time.
- Focus on getting the document to the point of being completely compliant and grammatically correct before anything else, if short on time or resources.
- Edit in any order, ideally from most in-depth to least intensive.
  - Use a checklist for speed.
  - Automate editing tasks:
    - Run readability checks and identify all passive voice
    - Use Ctrl+F to find all instances of -ize, -ion, all forms of to be, etc.
    - If you see a consistent mistake, run a global Find and Replace instead of manually correcting each instance.



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OST EDITING CHECKLIST
How to Self-Edit Prior to Turning Sections to Editors

After completing your section, go through this checklist and edit your section before it goes to the editor, as follows:

1. **CONTENT:**
   - ☐ Check your draft against the annotated outline – are there any sections missing? If so, put a placeholder to add these sections, or write them.
   - ☐ Search the section for compliance with the RFP: did you use the key words from the RFP requirement, and customer's terminology? Did you address every single element of the requirement paragraph?
   - ☐ Are all your facts and elements of the approach accurate? This is your chance to double-check.
   - ☐ Is your section consistent with the overall approach and other parts of the proposal? For example – are you quoting the same number of employees as other authors? Are the titles and names of those responsible for doing the work correct? It is time that you check with the rest of the team.
   - ☐ Is there information that is still missing? Take action to add it in.
   - ☐ Review other authors' sections and check your section for redundancy. Call it to the proposal manager's attention.
   - ☐ Make sure that you have included the win themes with benefits and proof.
   - ☐ Spell out all the acronyms the first time you use them in the section.

2. **LENGTH and STRUCTURE:**
   - ☐ Check the section length – are you within the page limit? If you are over the page limit, cut what you can without sacrificing the quality of the content. If you are within 10% of the required section length, do not worry about shortening any further – simple editing may cut the length naturally.
   - ☐ Move paragraphs and sentences in the paragraphs around for better section flow. Usually, the section has to flow in the following order:
     - WHY (customer problem, challenge, or key risk factor behind the requirement)
     - WHAT (what is it that we propose to do to respond to the requirement)
     - WHO (who exactly is going to do this part of work, by name and title)

1 | Page

Determining Workflow When Working in a Team

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Splitting up a document between multiple editors is a recipe for trouble unless you know what you are doing and you are good at coordinating others' work.

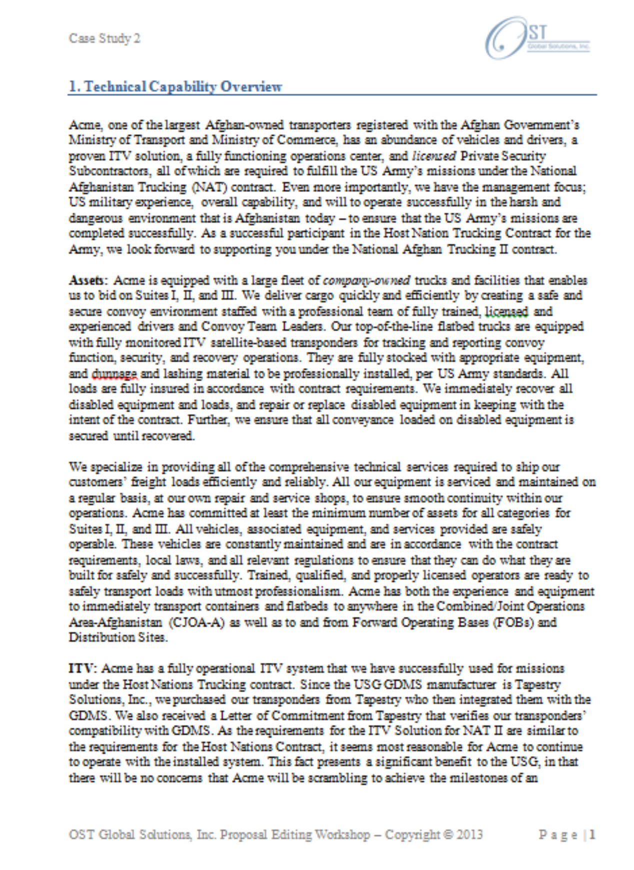
- **If you have a long document to edit, consider breaking it up into smaller documents for each person.**
- **Assign sections based on speed and time allotted.**
- **Agree on conventions of single voice:**
    - **Consistent Verb Tense (Present, future, or both? When?)**
    - **Adjectives (normally minimized)**
    - **Proposal-specific terminology**
    - **Grammatical conventions**
    - **Tone and rhythm**
- **Assign one person to serve as an "air traffic controller"**
    - **Version control is all-important**
    - **Someone needs to check on the team to track progress**
    - **Make sure all editors have the same style guide**
- **Have the desktop publisher re-integrate the pieces after the lead editor accepts or rejects the team's changes**

Exercise

Estimating and planning editing time, and optimizing your work

1. Take a look at your handout

- Determine what levels of edits may be required.
- Estimate how long it will take you to edit a document of this size:
  - 3 pages
  - 1548 words
- What steps will you take to fix the problems, and in what order?


Case Study 2

1. Technical Capability Overview

Acme, one of the largest Afghan-owned transporters registered with the Afghan Government's Ministry of Transport and Ministry of Commerce, has an abundance of vehicles and drivers, a proven ITV solution, a fully functioning operations center, and *licensed* Private Security Subcontractors, all of which are required to fulfill the US Army's missions under the National Afghanistan Trucking (NAT) contract. Even more importantly, we have the management focus; US military experience, overall capability, and will to operate successfully in the harsh and dangerous environment that is Afghanistan today – to ensure that the US Army's missions are completed successfully. As a successful participant in the Host Nation Trucking Contract for the Army, we look forward to supporting you under the National Afghan Trucking II contract.

Assets: Acme is equipped with a large fleet of *company-owned* trucks and facilities that enables us to bid on Suites I, II, and III. We deliver cargo quickly and efficiently by creating a safe and secure convoy environment staffed with a professional team of fully trained, licensed and experienced drivers and Convoy Team Leaders. Our top-of-the-line flatbed trucks are equipped with fully monitored ITV satellite-based transponders for tracking and reporting convoy function, security, and recovery operations. They are fully stocked with appropriate equipment, and dunnage and lashing material to be professionally installed, per US Army standards. All loads are fully insured in accordance with contract requirements. We immediately recover all disabled equipment and loads, and repair or replace disabled equipment in keeping with the intent of the contract. Further, we ensure that all conveyance loaded on disabled equipment is secured until recovered.

We specialize in providing all of the comprehensive technical services required to ship our customers' freight loads efficiently and reliably. All our equipment is serviced and maintained on a regular basis, at our own repair and service shops, to ensure smooth continuity within our operations. Acme has committed at least the minimum number of assets for all categories for Suites I, II, and III. All vehicles, associated equipment, and services provided are safely operable. These vehicles are constantly maintained and are in accordance with the contract requirements, local laws, and all relevant regulations to ensure that they can do what they are built for safely and successfully. Trained, qualified, and properly licensed operators are ready to safely transport loads with utmost professionalism. Acme has both the experience and equipment to immediately transport containers and flatbeds to anywhere in the Combined/Joint Operations Area-Afghanistan (CJOA-A) as well as to and from Forward Operating Bases (FOBs) and Distribution Sites.

ITV: Acme has a fully operational ITV system that we have successfully used for missions under the Host Nations Trucking contract. Since the USG GDMS manufacturer is Tapestry Solutions, Inc., we purchased our transponders from Tapestry who then integrated them with the GDMS. We also received a Letter of Commitment from Tapestry that verifies our transponders' compatibility with GDMS. As the requirements for the ITV Solution for NAT II are similar to the requirements for the Host Nations Contract, it seems most reasonable for Acme to continue to operate with the installed system. This fact presents a significant benefit to the USG, in that there will be no concerns that Acme will be scrambling to achieve the milestones of an

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Editing Mechanics

Module 4

Developing a Systematic Approach to Electronic Editing

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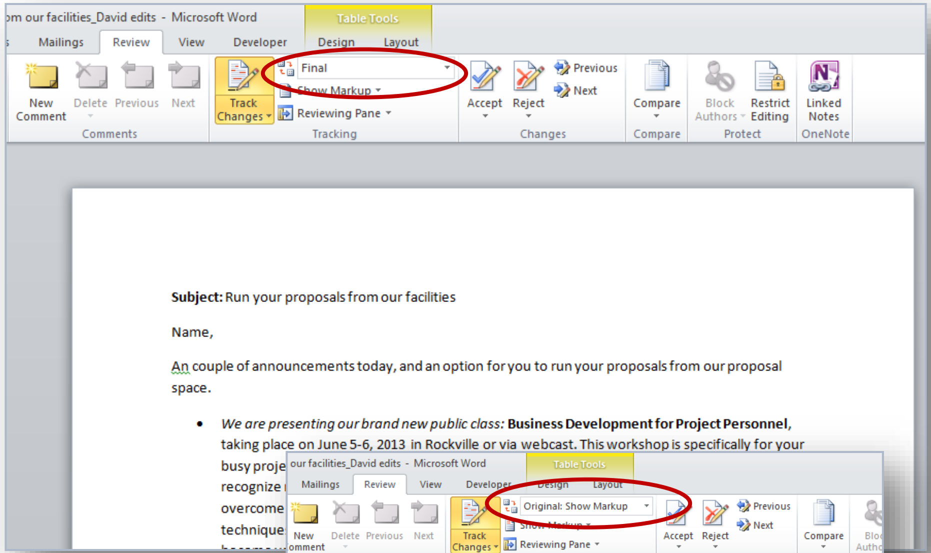
By having a plan and a full set of tools at your disposal, you can become a maverick of editing efficiency and accuracy.

- Systematic electronic editing elements include:
  1. Confusion avoidance
  2. Version control principles
  3. A planned workflow (correct work sequencing) for you alone or you and a team
  4. Mastering MS Word tools to make work faster and easier
- Element One: Confusion avoidance
  - Turn track changes on to ensure the “customer” or lead editor can see your changes.
  - **IMPORTANT:** Edit in the “Final” view to avoid missing spaces, “glued together” words and other gaffes.
  - Turn off “Final” view when sending the document to others.
  - Use comments function for questions to SMEs.



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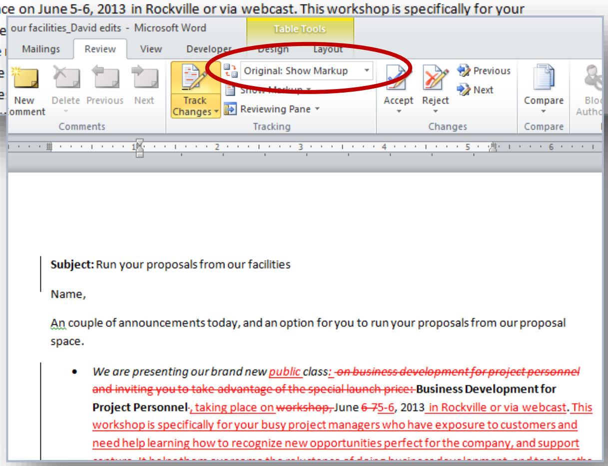
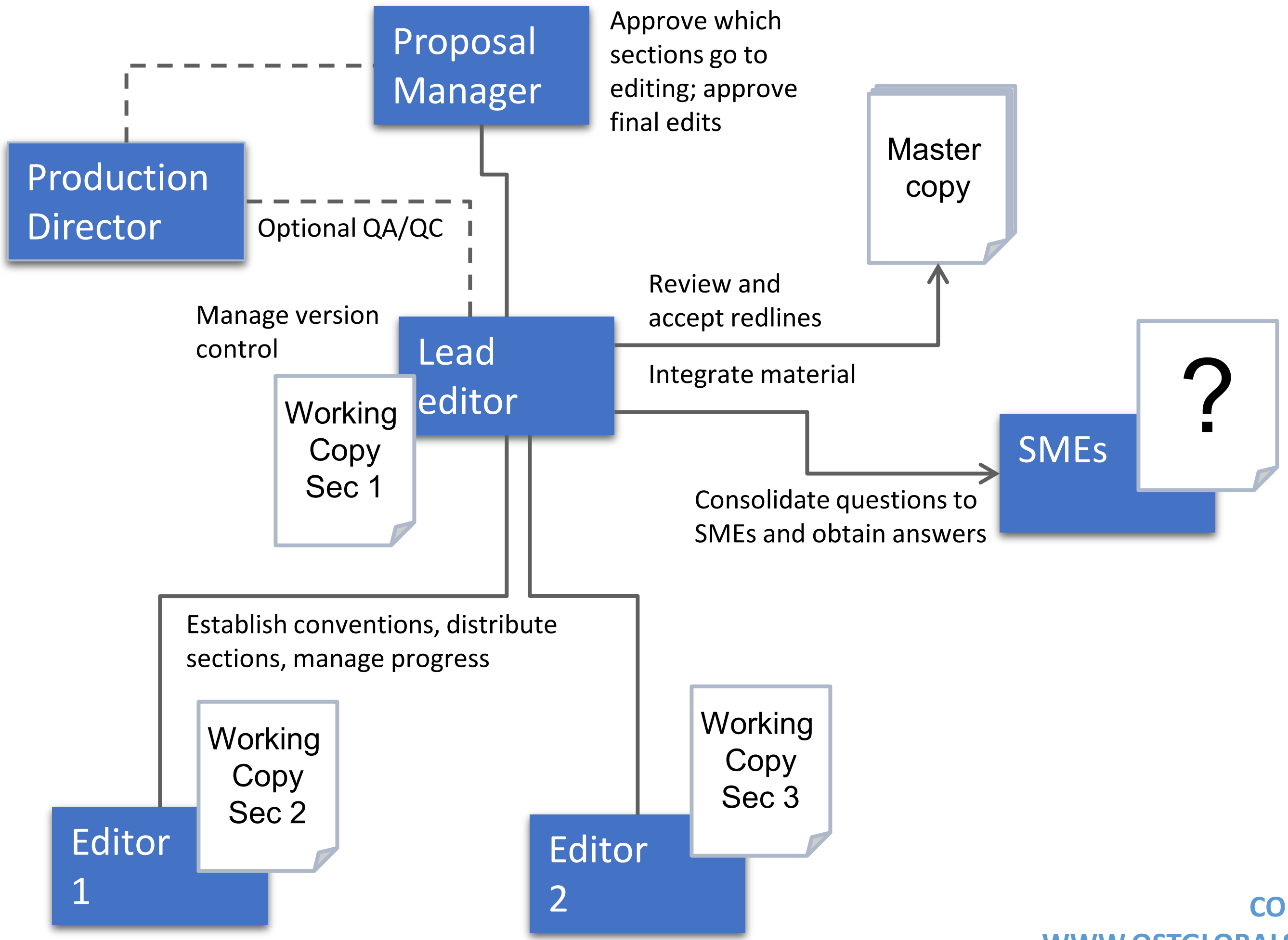


Element Two: Version Control Principles

Version control enables multiple people to simultaneously work on a single project; poorly executed, it is one of the biggest reasons for critical time (and reputation) loss in the final stretch of a proposal schedule.

- When saving a file, put the editor's name and a version number in the file name.
    - Section_1_Technical _Approach_v3_OSTedit.docx
    - Section_1_Technical_Approach_091413_09:30_OST.docx
    - Do not overwrite when saving someone else's work; always save the emailed file with a new name and time.
    - Triple-check to ensure you are working on the right version and that you send and receive the right versions.
- Save a new version every few pages to minimize potential damage.
    - If the document gets corrupted or data is lost, revert to the previous version.
    - If you overwrite good stuff and make a mistake, you can easily restore information.
- Back up by emailing the document to yourself or uploading to collaboration workspace.
- Never assume; clarify who is working on which section, and state explicitly what section you are editing.

Element Three: Planned Workflow



Element Four: Mastering MS Word Tools to Make Work Faster and Easier

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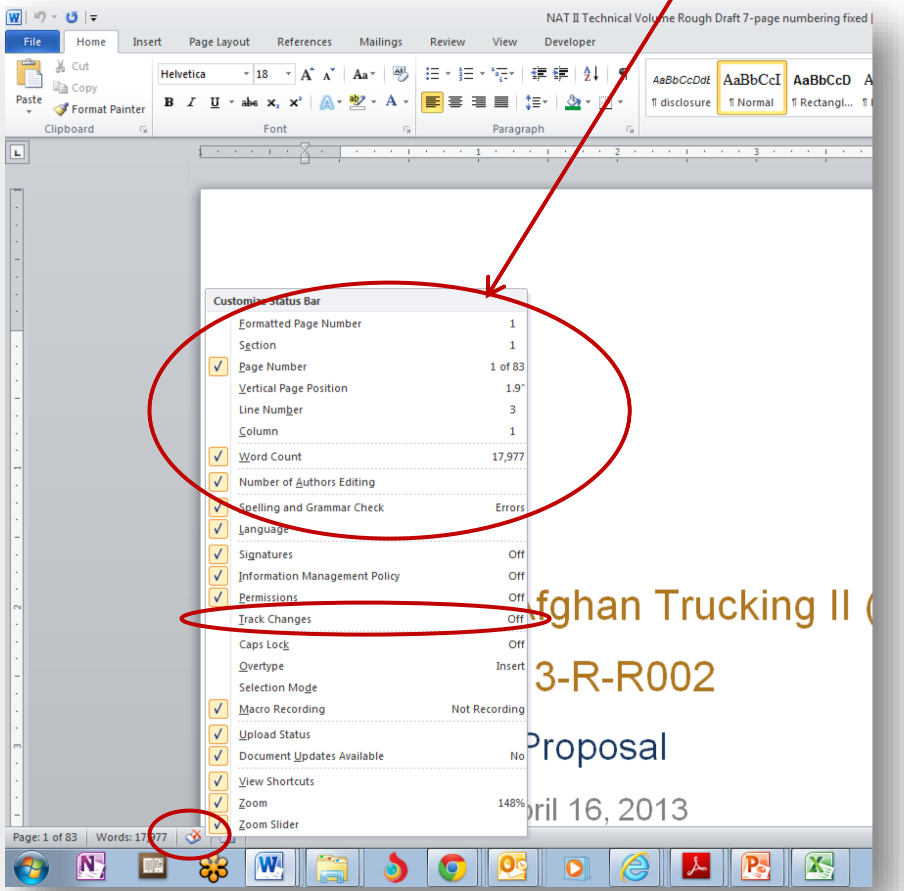
The only time not to use Track Changes while editing is if you are merging in a large block of unedited text from another document. Turn off Track Changes temporarily while pasting the text, then turn it back on to edit the new text.

- The Best Editor's Friend in Microsoft Word: Track Changes
  - Track Changes shows others exactly what modifications you made to a document .
  - It keeps track of which author made which changes, allowing multiple people to work on the same document without causing confusion.
  - Before using Track Changes, make sure the document displays Track Changes status in the status bar.
    - Right click on the status bar at the bottom of the document, and select "Track Changes" from the menu.
    - This will allow you to check whether or not the document is tracking changes at a glance and avoid doing a lot of work that can't be easily traced.
  - To turn Track Changes on or off, hit Ctrl+Shift+E or use the Review tab.

Bonus: stats at a glance



There is Much More to Tracking Changes Effectively

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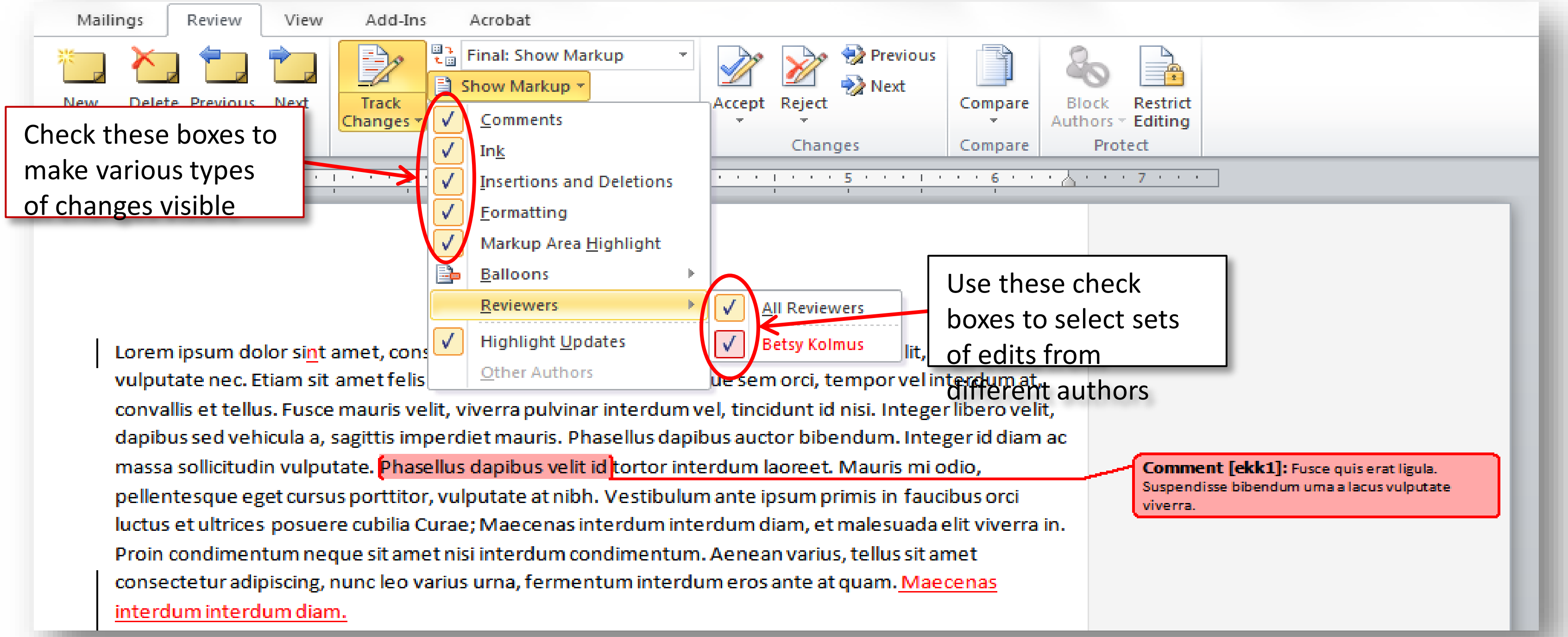
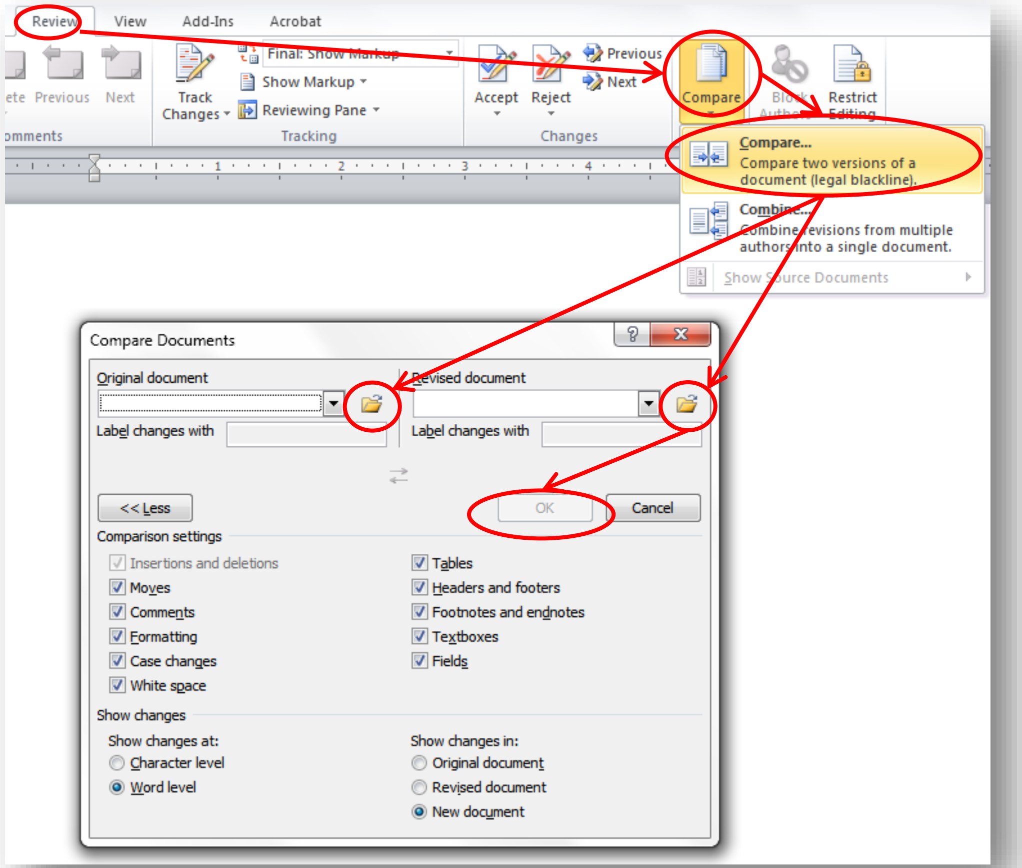
- While you are editing a document, either switch to Final view or turn off visibility for formatting changes, insertions and deletions.
  - This will help prevent spacing and line break problems, extra letters in words, etc.
- If reviewing edits in a document touched by multiple authors, view individual sets of edits one at a time.



Using *Compare Documents* to Recover Untracked Editing

- Sometimes a collaborator works in a document without tracking changes, making it almost impossible to tell what they did.
- An easy fix is to use the *Compare Documents* feature in Word.
- In the Review tab, select “Compare” from the Compare drop-down menu.
- Click the left folder icon and navigate to the original document.
- Click the right folder icon and navigate to the modified document.
- Under “Label changes with,” put the other person’s name.
- Hit OK.
- Word will create a new document showing you where the changes are.
- Save it under a new version number.



Tracking and Merging Changes by Multiple Reviewers

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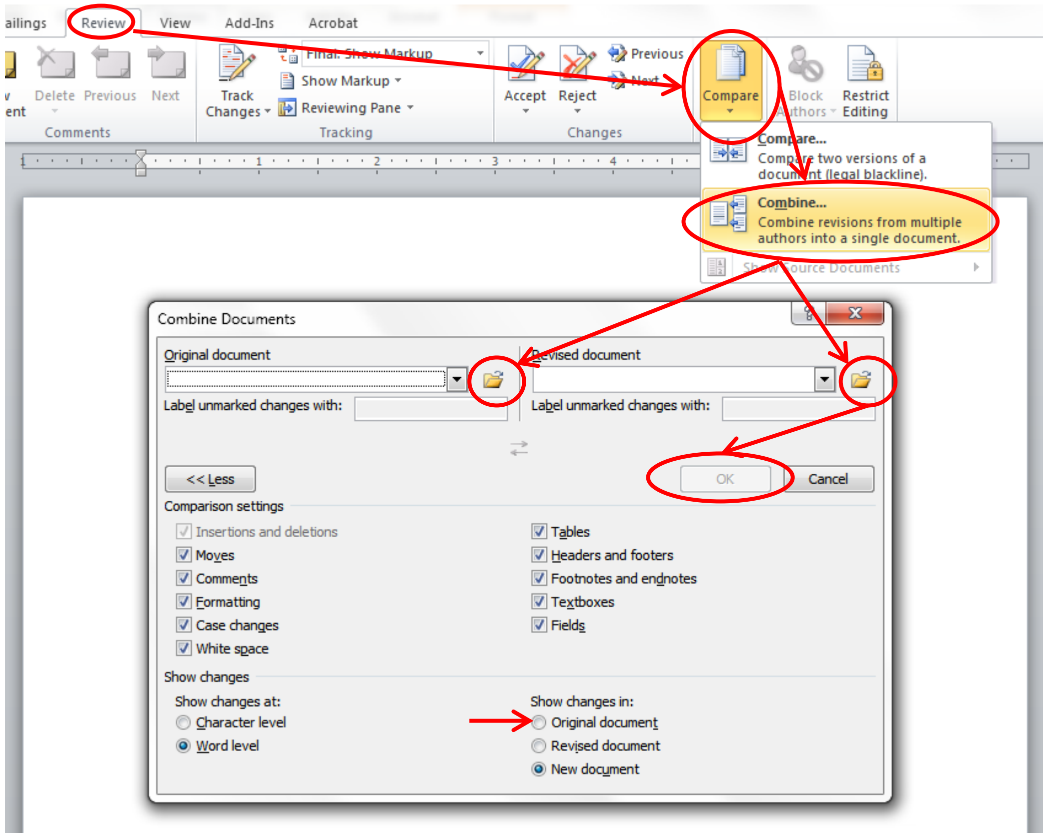
- On the Review ribbon, select *Combine*.
- Click the left folder icon and navigate to your master document.
- Click the right folder icon and navigate to the file containing the reviewer's edits.
- If for some reason the reviewer's name isn't on his or her edits, add it in the rightmost textbox for "Label unmarked changes with:".
- Show changes in the original document, then hit OK.
- If you put the documents in the wrong order, you can use the middle arrows to switch positions.
- Additional success tips:
  - If you want to only merge certain kinds of changes, select which kinds under Comparison settings.
  - Combining changes from more than 3 reviewers can get chaotic; reject/accept conflicting changes before adding more.



Quickly Zoom In and Out for Different Editing Levels

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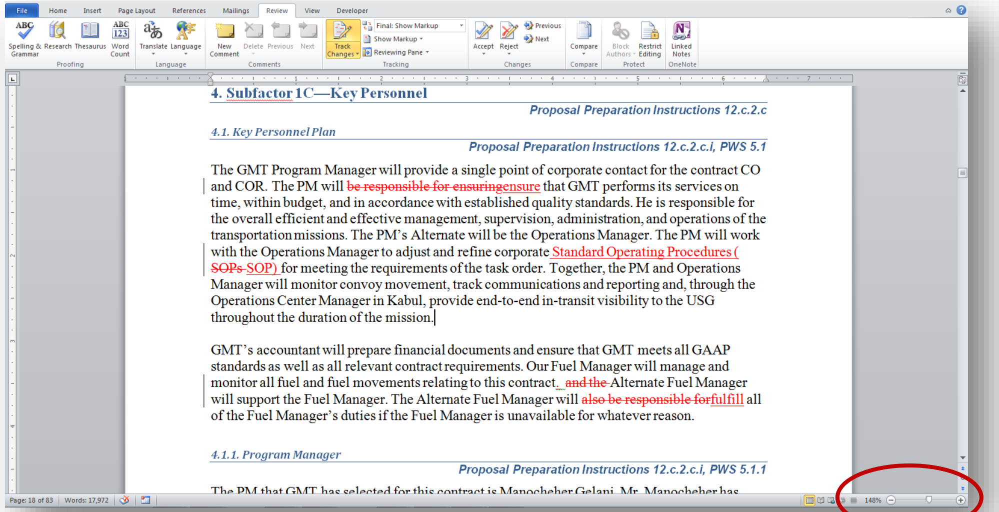
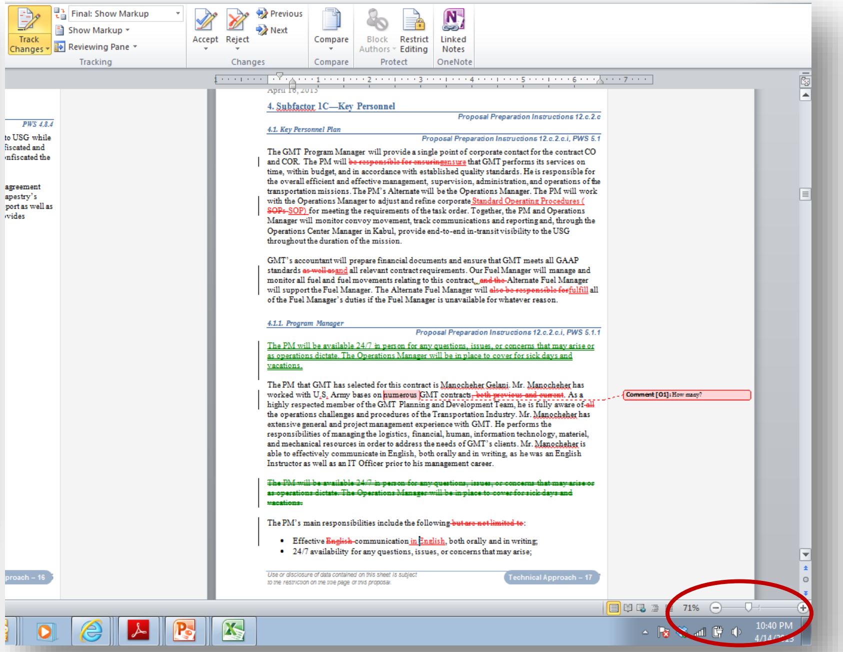
Focus on one level of editing at a time. If you get stuck in the weeds correcting grammar and punctuation when there are structural or content issues, you will be wasting your time as well as the customer's and bringing your efficiency down.



Zoom in for detailed editing, to focus on words and punctuation.



Zoom out when moving sentences and taking in the whole page (or more) at a glance.

Use MS Word Shortcuts for Greater Efficiency

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Ctrl+Y or F4 can be really helpful when applying formatting to a large number of paragraphs or cells in a table. Simply perform the action you want to repeat, select the next object you want to act on, and re-do the action.

There are 247 keyboard shortcuts in Word; these are some of the most useful:

Shortcut	What it does	Shortcut	What it does
Ctrl+Shift+E	Turn Track Changes on and off	Ctrl+B	Add bold formatting to text
Alt+Ctrl+M	Insert a comment	Ctrl+I	Add italic formatting to text
Ctrl+Z	Undo an action	Ctrl+Space	Remove all formatting from text
Ctrl+Y	Re-do the most recent action	Shift+F3	Change case
Ctrl+F	Find a word or phrase	Shift+F7	Look up synonyms
Ctrl+H	Find and replace	Ctrl+C	Copy text
Ctrl+Shift+Right, Ctrl+Shift+Left	Select the word to the right or left of the cursor	Ctrl+X	Cut text
Ctrl+Shift+Down	Select an entire paragraph	Ctrl+V	Paste text
Ctrl+A	Select all text in the document or text box	Ctrl+Alt+V	Paste special
Ctrl+Backspace, Ctrl+Delete	Delete the entire word before or after the cursor	Ctrl+Home, Ctrl+End	Move to the top of the first page or end of the last page of a document
Ctrl+Minus	Insert an en dash (note: must use minus sign on number pad for this to work)	Alt+X	Find out the Unicode character code for a selected special character
Alt+Ctrl+Minus	Insert an em dash	Ctrl+[or]	Decrease or increase font size

Typical Editing Traps and How to Avoid Them

- Lack of understanding of the subject matter and the RFP, leading to incorrect vocabulary usage
- Not inquiring about the level of editing required
  - Wrong level of edit may lead to budget overrun, missed deadlines and/or customer disappointment
- Not planning the edits
  - Not budgeting specific time for multiple passes
  - Going too deep on one section and running out of time in another
- Overlooking tables and graphics, and focusing on text only
- Accepting all changes made by another editor without reviewing them
  - Always go through edit-by-edit and accept or reject each change based on its own merit
  - Don’t trust a fellow editor just because he or she normally does a good job
- Not doing at least one read-through of the document in another format

Proofreading Marks for Hardcopy Editing

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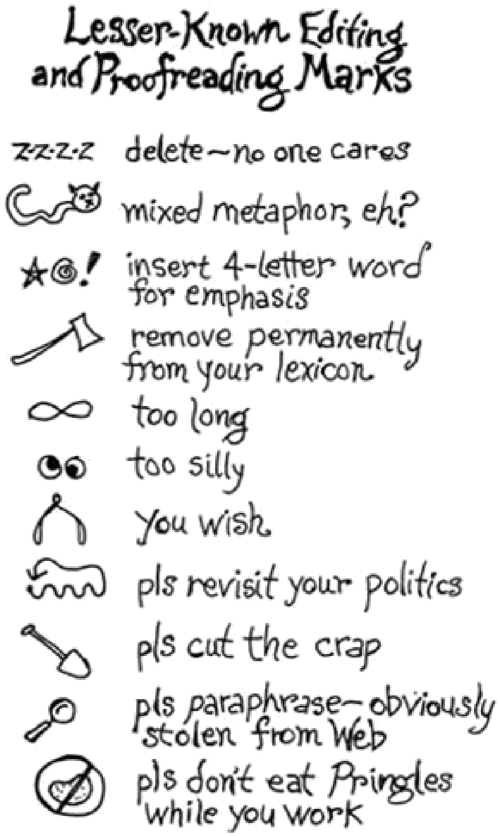

Additional Editing Techniques to Ensure a Cleanly-Edited Copy

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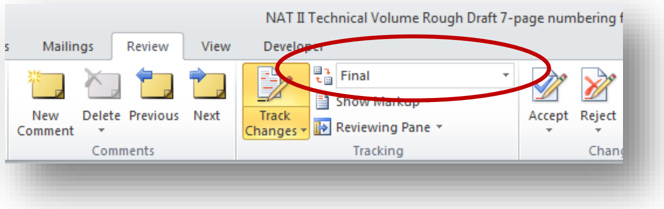
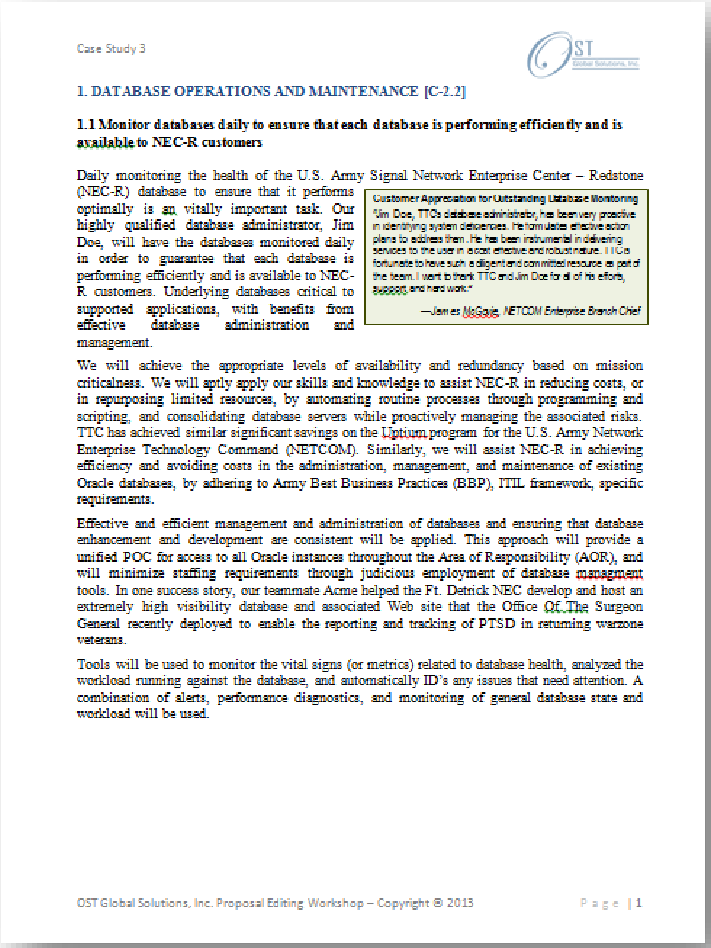
- Always edit in the “Final” view instead of “Final: Show Markup”.
- Convert the Word document to a PDF for the next pass.
- Change the font to trick your eyes for the next pass.
- Start at the end of the document instead of the beginning.
- Read the text out loud or have the text read to you by someone else.
- Project the text on-screen (especially if editing with someone else).
- Edit on hardcopy, and then transfer edits to the electronic document. (Best for a final draft when you are checking with a fine-toothed comb for errors.)
- Read from hardcopy and edit on the computer screen simultaneously. (Best for when you have to flip back and forth between sections of the document)
- Let time pass between writing and editing, if you are self-editing.



Exercise

Comparing editing techniques

- Practice and compare two different editing techniques.
- What were you able to notice on the first and second passes?
- Notice the difference in the resulting editing quality when you make a second pass.



Case Study 3

1. DATABASE OPERATIONS AND MAINTENANCE [C-2.2]

1.1 Monitor databases daily to ensure that each database is performing efficiently and is available to NEC-R customers

Daily monitoring the health of the U.S. Army Signal Network Enterprise Center – Redstone (NEC-R) database to ensure that it performs optimally is an vitally important task. Our highly qualified database administrator, Jim Doe, will have the databases monitored daily in order to guarantee that each database is performing efficiently and is available to NEC-R customers. Underlying databases critical to supported applications, with benefits from effective database administration and management.

> **Customer Appreciation for Outstanding Database Monitoring**
> "Jim Doe, TTC's database administrator, has been very proactive in identifying system deficiencies. He formulates effective action plans to address them. He has been instrumental in delivering services to the user in a cost effective and robust nature. TTC is fortunate to have such a diligent and committed resource as part of the team. I want to thank TTC and Jim Doe for all of his efforts, support, and hard work."
> —*James McGavie, NETCOM Enterprise Branch Chief*

We will achieve the appropriate levels of availability and redundancy based on mission criticalness. We will aptly apply our skills and knowledge to assist NEC-R in reducing costs, or in repurposing limited resources, by automating routine processes through programming and scripting, and consolidating database servers while proactively managing the associated risks. TTC has achieved similar significant savings on the Uptium program for the U.S. Army Network Enterprise Technology Command (NETCOM). Similarly, we will assist NEC-R in achieving efficiency and avoiding costs in the administration, management, and maintenance of existing Oracle databases, by adhering to Army Best Business Practices (BBP), ITIL framework, specific requirements.

Effective and efficient management and administration of databases and ensuring that database enhancement and development are consistent will be applied. This approach will provide a unified POC for access to all Oracle instances throughout the Area of Responsibility (AOR), and will minimize staffing requirements through judicious employment of database managment tools. In one success story, our teammate Acme helped the Ft. Detrick NEC develop and host an extremely high visibility database and associated Web site that the Office Of The Surgeon General recently deployed to enable the reporting and tracking of PTSD in returning warzone veterans.

Tools will be used to monitor the vital signs (or metrics) related to database health, analyzed the workload running against the database, and automatically ID's any issues that need attention. A combination of alerts, performance diagnostics, and monitoring of general database state and workload will be used.

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Substantive Editing

Module 5

Maximizing Clarity and Compliance With the Outline and RFP

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- When an annotated outline or storyboards were prepared, go section-by-section and compare the requirements to the content.
- Highlight missing information, such as:
  - Headings
  - Key words/phrases
- Suggest ideas for each section.
- Identify areas that may require additional SME data calls or interviews.

Reintroducing RFP and Customer Language

Speaking the customer's language back to them improves comprehension and makes them feel truly understood.

- Go through your copy of the Statement of Work and highlight any jargon or terms of art you encounter.
- As you read through the proposal, keep an eye out for places where the offeror may have used the wrong term, and replace it with a more customer-specific one.
- Other places to find customer language would be on the agency website, in press releases, or in any capture intelligence the company has gathered.

Identifying and Eliminating Irrelevant Boilerplate

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- Some boilerplate content is OK, especially in a standard plan, but most instances are just laziness on the author's part.
- Red flags that you have boilerplate on your hands:
    - Wrong customer, offeror, or program name
    - Generic wording—no specific "how" details or proof
    - The answer is "kind of" appropriate, but is not really answering the mail
    - Customer language is absent or wrong
- How to fix it?
    - Determine whether it is easier to start from scratch by interviewing the writer and rewriting the section or to salvage the material.
    - Reach out to SMEs to get missing content.

Boilerplate Example: Acme, Inc. is an innovative 8(a) company that strives to provide timely, cost-effective construction services that meet and exceed our customers' expectations. We are a leader in cost-effective environmental and construction services worldwide. Innovative approaches in implementation, project management and subcontract management have enabled Acme to lead the market in price and performance. Acme has an exemplary record of completing assignments ahead of schedule and within budget. Superior project management and commitment to our clients continue to be Acme's primary focus.

How to Avoid Distorting the Author's Meaning

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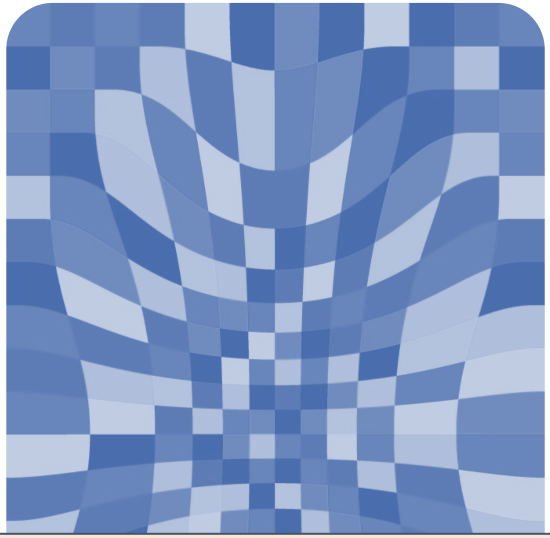
*A small change in wording can completely **distort** the intended meaning of the writer; develop an understanding of when this may happen.*

- Look at the broader context of the sentence (what comes before and after the sentence).
- Reread the sentence a few times; read it out loud to attempt to understand the author's intent.
- If you are not sure whether the connotations of a word or phrase are the same as the one you want to replace, run it by an SME.
- There may be nuances that are lost in your corrections; preserve the author's intent.
- Sometimes it is hard to judge what the meaning is, so it is hard to tell if your improvements are changing or preserving the meaning.
  - Avoid assumptions.
  - If in doubt, ask the author for clarification. You can often get them to tell you a better way to say what they intended.



Example: Competencies related to diplomatic stance provide detail around the individual's ability to think about themselves cultural context and managing their own attitudes towards culture that support their ability to use cultural understanding to accomplish mission-related objectives. The ability to adopt a diplomatic stance assumes the general understanding that building strategic, intercultural relationships can be a direct means to achieve mission objectives and awareness of specific ways in which cultural knowledge and skills can be used to develop and maintain such relationships.

Flagging Inconsistencies, Incomplete Information, and Ambiguity

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Ambiguity is common in natural language, while formal proposal language has to be unambiguous by design.

- Resolve whatever inconsistencies you can yourself, if you know the correct answer.
  - Acronyms: Look for cases like the Department of Defense acronym, which is now DOD rather than DoD. Here's another good example: U.S. vs. US; if you see both intermittently, use Find and Replace to make all references consistent.
  - Look for inconsistent rounding of quantities as well as inconsistent quantities in general.
  - Also look for inconsistent term usage, punctuation, capitalization, and other such problems.
- Flag information gaps and ambiguity (i.e. more than one meaning).
  - Example: "Visiting customers can be difficult."
- Pose your questions to SMEs.

Tips on working with SMEs:

- If impossible to figure out a meaning on your own, use the Comment function rather than highlighting. This will make it easier for the author to find the areas that need work.
- Specify what type of information is required to resolve the issue by asking a pointed question or by giving an example.
- Quote the RFP, if you can, to make sure you are showing the author the exact wording of the requirement.

Adding Benefits and Proof Language to Improve Persuasion

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- A benefit is the "so what?" behind a proposed feature.
  - If the author has written at length about a feature of the solution without directly tying it to what the government asked for in the solicitation, see if you can add a sentence or two explaining the feature's importance in the context of the RFP; otherwise, flag it.
- Proof is specific, quantifiable information that makes the company's promises believable. Types of proof include answers to questions like:
  - Where have you done it before successfully?
  - How many dollars or days did you save?
  - Did you make any quantifiable improvements in quality or risk reduction?
  - What statistics can you cite to back up your claims?
  - Who was your customer, how many people did the project have, and for how many years did you do it?
- If you have access to any research materials through the company, you may be able to come up with some of this yourself. However, it is often best to ask the SME or a senior executive, since they will know a lot of this information.

Translating Technicalese to English

Technicalese is the vocabulary unique to a particular field or agency which, to an outsider, can look totally incomprehensible.

- Many experts with extensive academic backgrounds also suffer from excessive wordiness and passive voice.
- A certain amount of jargon is permissible in a proposal—especially words and abbreviations that the customer uses and prefers themselves.
  - For example, using IAW (in accordance with) in a military proposal is perfectly acceptable, but it would come across as strange to a civilian agency.
- When translating technicalese to English, first reduce wordiness and passive voice and clarify sentence structure to solve 60% of readability problems.
- Spelling out some acronyms an extra time may help.
- Clarify who does what to whom where, when, how, and why; if you cannot figure it out, ask an SME for an explanation.
- Reduce jargon and replace it with more common English terms, but judiciously.

Spotting and Correcting Factual Inaccuracies that Could Kill Your Section Rating

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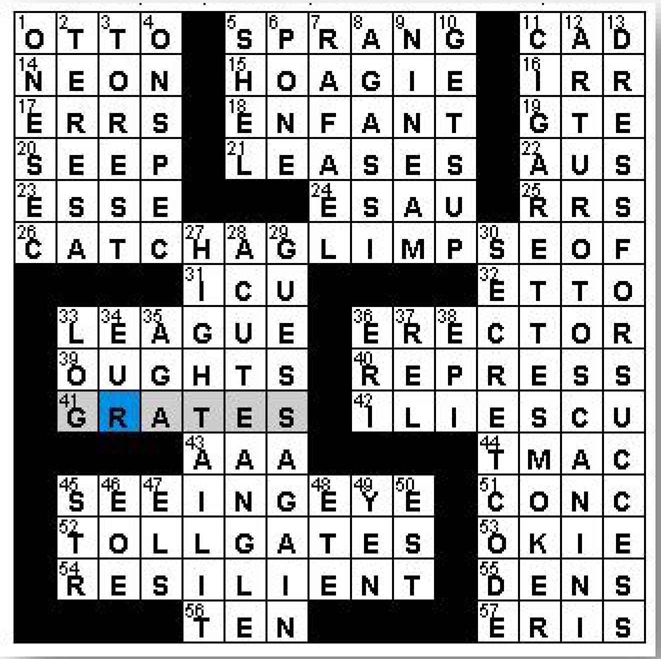
This is one of the trickiest, but most valuable, editing skills.

- The most important thing is to carefully read the text as you edit it—not just let the words hit your eyes without the meaning sinking in.
- When in doubt, Google is your friend.
- Being familiar with the basics of certain types of solutions common in government contracting is useful. Examples:
  - PMBOK
  - CMMI
  - Software Development Life Cycle
  - ADDIE
  - Deming Cycle
  - Can you think of any others?



Pinpointing Areas that Need Work

- In a document where multiple authors have contributed, there will naturally be some sections that are higher in quality than others.
- When skimming a document, red flags for areas that need work include:
  - Lack of substance and content holes
  - Extremely long paragraphs
  - Wrong words that jump out at you, like wrong agency name or wrong offeror name
  - Amateurish, primitive graphics not conveying any meaning (see example to right)
  - Bad formatting or a typeface that is different from the rest of the document
  - Large areas of white space caused by a graphic that is pulling down the text around it
- Adding a comment to a block of text needing work is better than graying it out or highlighting it, but none of those options is technically wrong.

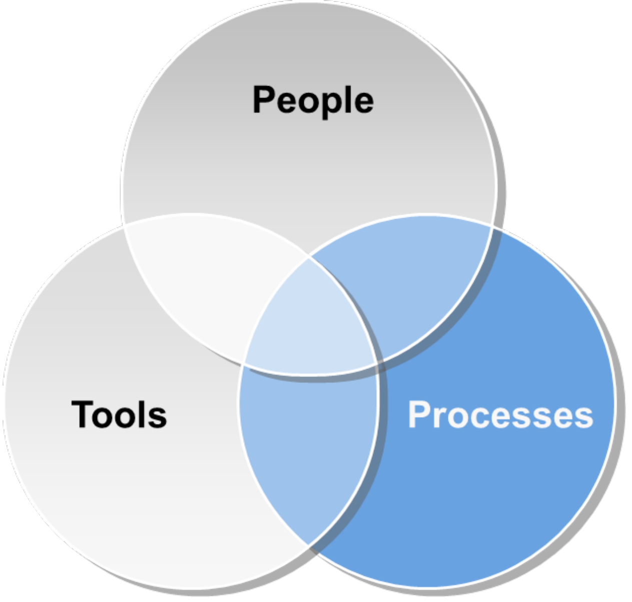
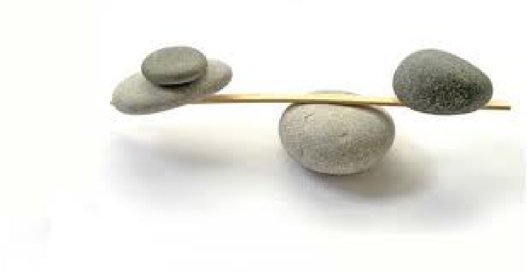


Figure 6. Technical Approach. *We deliver technical approach based on three principles: exceptional People, Tools, and Processes.*

Revising Figures and Tables

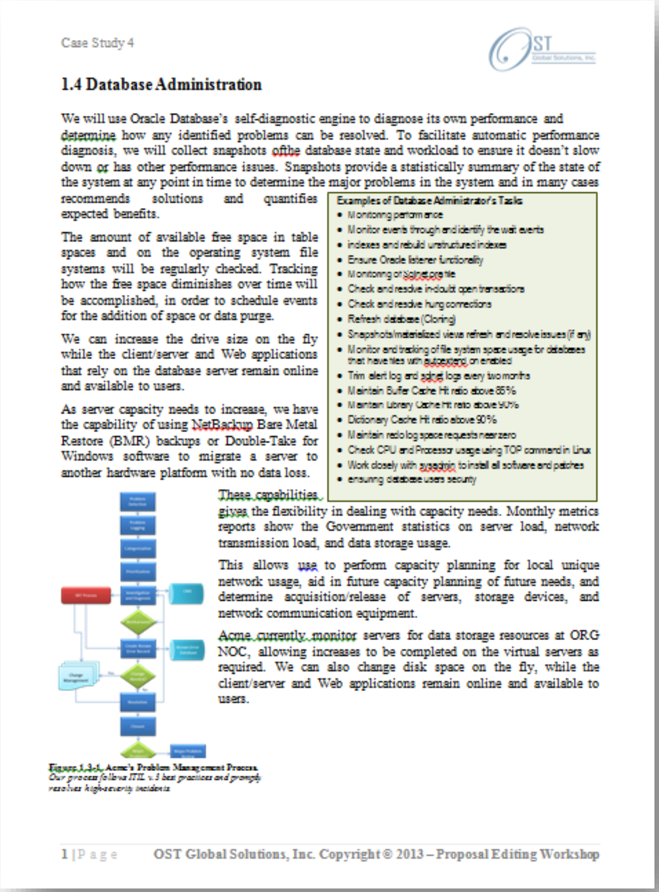
- In tables, use parallel structure.
- Cut down wordiness in graphics; most graphic artists are poor spellers, so all graphics are suspect.
- The two most important things to look for when revising figures and tables are a title/action caption and compliance with RFP typeface requirements.
  - Many authors and editors commit the grave sin of manually resizing graphics in the document. DON'T BE ONE OF THEM!
    - Manually resizing graphics smaller can make them non-compliant and risk a disqualification for the offeror.
    - If a graphic needs to be smaller, make a note for the graphic designer to resize the graphic themselves and specify what size it should be.
- It's also a good idea to edit bullet points in tables and graphics so that there isn't a single word dangling on the last line and taking up unnecessary space.



Exercise

Put your skills to use.

- Edit the handout using proofreading marks.
- Focus on substance and content; how could it be strengthened?
- What other problems did you find with this section?



Case Study 4

1.4 Database Administration

We will use Oracle Database's self-diagnostic engine to diagnose its own performance and determine how any identified problems can be resolved. To facilitate automatic performance diagnosis, we will collect snapshots ofthe database state and workload to ensure it doesn't slow down or has other performance issues. Snapshots provide a statistically summary of the state of the system at any point in time to determine the major problems in the system and in many cases recommends solutions and quantifies expected benefits.

The amount of available free space in table spaces and on the operating system file systems will be regularly checked. Tracking how the free space diminishes over time will be accomplished, in order to schedule events for the addition of space or data purge.

We can increase the drive size on the fly while the client/server and Web applications that rely on the database server remain online and available to users.

As server capacity needs to increase, we have the capability of using NetBackup Bare Metal Restore (BMR) backups or Double-Take for Windows software to migrate a server to another hardware platform with no data loss.

Examples of Database Administrator's Tasks

- Monitoring performance
- Monitor events through and identify the wait events
- indexes and rebuild unstructured indexes
- Ensure Oracle listener functionality
- Monitoring of Sqlnet.ora file
- Check and resolve in-doubt open transactions
- Check and resolve hung connections
- Refresh database (Cloning)
- Snapshots/materialized views refresh and resolve issues (if any)
- Monitor and tracking of file system space usage for databases that have files with autoextend on enabled
- Trim alert log and sqlnet logs every two months
- Maintain Buffer Cache Hit ratio above 85%
- Maintain Library Cache Hit ratio above 90%
- Dictionary Cache Hit ratio above 90%
- Maintain redo log space requests near zero
- Check CPU and Processor usage using TOP command in Linux
- Work closely with sysadmin to install all software and patches
- ensuring database users security

These capabilities gives the flexibility in dealing with capacity needs. Monthly metrics reports show the Government statistics on server load, network transmission load, and data storage usage.

This allows use to perform capacity planning for local unique network usage, aid in future capacity planning of future needs, and determine acquisition/release of servers, storage devices, and network communication equipment.

Acme currently monitor servers for data storage resources at ORG NOC, allowing increases to be completed on the virtual servers as required. We can also change disk space on the fly, while the client/server and Web applications remain online and available to users.

Figure 1.3-1. Acme's Problem Management Process. *Our process follows ITIL v.3 best practices and promptly resolves high-severity incidents.*

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Recap

Let's go over today's material:

- What are the key attributes of the best proposal editors?
- What are the things you need to know to build an editing workflow and estimate time?
- What are the 4 editing levels?
- What are the red flags for boilerplate?
- What is substantive editing?
- How do you maximize clarity and compliance in a section?
- What is your biggest take-away from today's class?

Thank You for Attending!

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