



OST GLOBAL SOLUTIONS



Proposal Editing Workshop

Day 2
OST Bid & Proposal Academy
Course

www.ostglobalsolutions.com

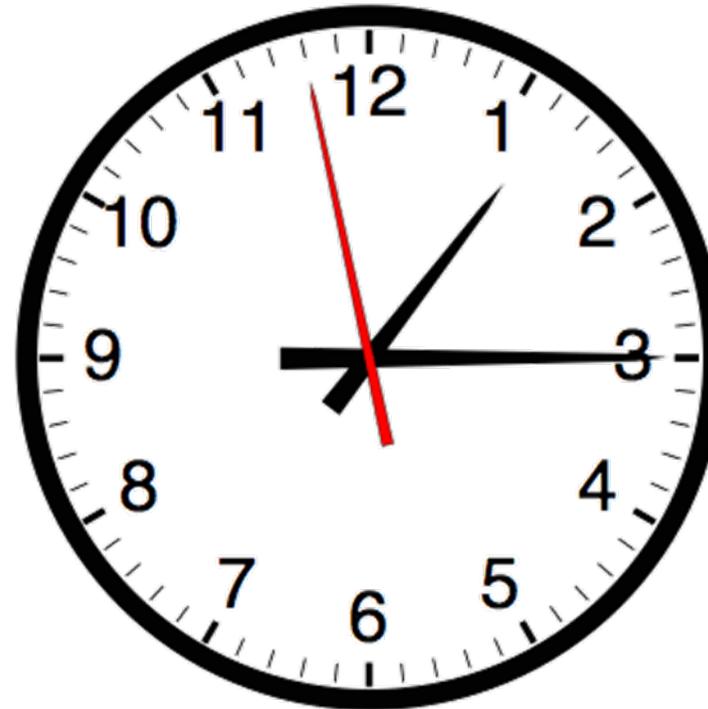
Agenda



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- 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*

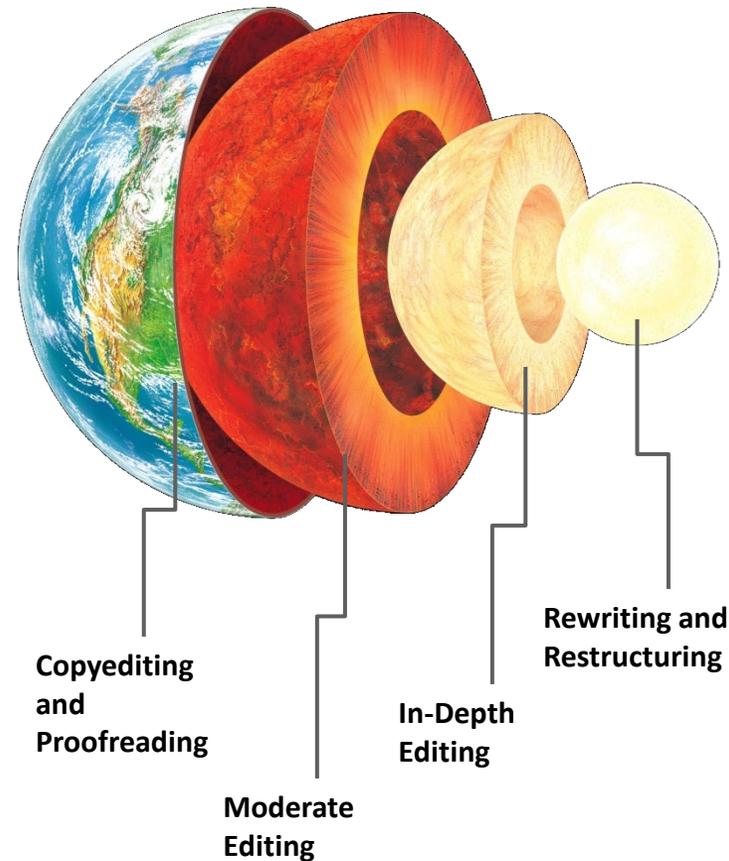
Recap: Levels of Editing



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





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Moderate Editing

Module 6



Cutting Text Length to Fit Within the Assigned Page Limit Without Sacrificing Content



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Trim in waves; start with quick fixes, and increase the level of rewrite, as needed.

- **Quick fixes (do these first):**
 - Reduce the font size to minimum allowed, reduce the amount of space between lines, and cut the amount of space before and after paragraphs.
 - Reorganize and resize tables. When allowed, use smaller/tighter font, like Arial 10.
 - Have the graphics resized by the artist.
 - Remove excessive modifiers and trim “fluffy” sentences and words.
 - Remove breaks between paragraphs.
 - Get rid of passive voice; use “we” instead of the company or team name repeatedly.
 - Eliminate groups of nouns when one word will do; get rid of unnecessary instances of “that”, “there is”, verbs disguised as nouns, etc.
- Use more acronyms.
- **Rewrite sentences; start with cutting all sentences that take up less than a full line at the paragraph’s end.**
- **Edit first to remove dead white space due to graphics.**
- **Create focus boxes and tables that use a smaller font (when the RFP allows) to nest key information.**
- **Consolidate multiple repetitive sections into one.**
- **Go back to the RFP or outline to see what is actually required in the section; remove everything that neither answers the mail nor adds value.**



Exercise



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- Compare the sections to determine what techniques were used to reduce page count in half and why they worked.

Case Study 5 – Part 1



4.1 Task 2.0 Training, Outreach Awareness, and Media Implementation Support Tasking (SOW 2.0)

The sections below provide a complete description of how our full-time technical support personnel will perform training, outreach awareness, and media implementation support.

4.1.1 Awareness Strategy Development (SOW 2.1)

Through our Team's previous experience supporting SOPD, we understand that critical infrastructure protection plans are useless without the awareness and engagement of private industry to partner with the Government. It is critical that all stakeholders within private industry remain cognizant of the all-hazards risk to our critical infrastructure, as well as what products and services are available to help them manage that risk. Team Acme has specific expertise supporting SOPD awareness strategy development, to ensure that SOPD's initiatives, products, and services are high quality and targeted to most effectively reduce infrastructure risk.

Essential to the success of Sector Outreach and Programs Division's (SOPD's) mission is ensuring that stakeholders remain vigilant and cognizant of the all-hazards risk to our critical infrastructure, that they understand where, how, and what products and services are available to help them manage that risk, and that they remain actively engaged in infrastructure partnerships and information sharing.

Team Acme's broad experience in building national-level awareness programs, coupled with its specific experience and expertise supporting SOPD outreach and awareness initiatives, will ensure that SOPD's outreach and awareness initiatives, products, and services are of the highest quality and that they reach the right people high quality and accurately targeted to most effectively reduce infrastructure risk. Our Team helped build and support lasting relationships between the Office of Infrastructure Protection (IP) and corporate executives and senior government officials across sectors and jurisdictions. Whether through the National Infrastructure Advisory Council (NIAC), Critical Infrastructure Partnership Advisory Council (CIPAC), Government and Sector Coordinating Councils (GCCs and SCCs), or organizations such as the Corporate Executive Board and major trade associations, we have helped IP further its infrastructure mission. We helped develop a Sector-Specific Agency (SSA) International Engagement Strategy, Sector-Specific Plans (SSPs), Sector Annual Reports (SARs), and numerous best practices documents and marketing materials, including brochures, posters, pocket guides, and web-based products.

We recognize that SOPD requires awareness strategies targeted to both the executive and technical levels in private industry. Effecting lasting changes in behavior that reduce risk to critical infrastructure, whether by enhancing protection or improving resilience, requires thorough understanding of behavior change and risk communications grounded in research regarding stakeholder behaviors, barriers, and perceptions.

Our overarching awareness strategy will be to strengthen SOPD's product and service brand through developing and testing concepts to increase memorability and clarity/consistency of message. For appropriate SOPD awareness products and services, we can develop a single online toolbox with an easy to recognize URL to enable relevant audiences to easily access campaign assets. For specific issue areas, we will develop strategies for messaging and creative concepts that blend overarching brand strategy with strategies intended for a given target audience. We validate strategic concepts through one-on-one interviews, online or in-person focus groups, web

Case Study 5 – Part 2



4.1 Task 2.0 Training, Outreach Awareness, Media Implementation Support (SOW 2.0)

Awareness Strategy Development (SOW 2.1):

Through our Team's previous experience supporting SOPD, we know that critical infrastructure protection plans are useless without the awareness and engagement of private industry to partner with the Government. All stakeholders within private industry must remain cognizant of the all-hazards risk to our critical infrastructure, as well as what products and services are available to help them manage that risk. SOPD requires awareness strategies targeted to both the executive and technical levels in private industry. Effecting lasting changes in behavior that reduce risk to critical infrastructure, whether by enhancing protection or resilience, requires thorough understanding of behavior change and risk communications based on research in stakeholder behaviors, barriers, and perceptions. Our awareness strategy will strengthen SOPD's product and service brand through developing and testing concepts to increase memorability and clarity/consistency of message. For appropriate SOPD awareness products and services, we can develop a single online toolbox with a recognizable URL to enable relevant audiences to easily access campaign assets. For specific issue areas, we will develop strategies for messaging and creative concepts that blend overarching brand strategy with strategies intended for a target audience. We validate strategic concepts through one-on-one interviews, online or in-person focus groups, web surveys, and pilot programs, depending on what is most appropriate and cost-effective. We document evidence-based findings on message effectiveness, and highlight best practices pertaining to sector-specific, audience-based, geographically, or topically relevant content.

- Our Team Has Helped:**
- Build and support lasting relationships between the OIP, corporate executives, and senior government officials across sectors & jurisdictions
 - Further IP's infrastructure mission through the National Infrastructure Advisory Council (NIAC), Critical Infrastructure Partnership Advisory Council (CIPAC), Government and Sector Coordinating Councils (GCCs and SCCs), and organizations such as the Corporate Executive Board and major trade associations
 - Develop an SSA International Engagement Strategy, SSPs, Sector Annual Reports (SARs), and best practices documents and marketing materials, including brochures, posters, pocket guides, and web-based products

Findings Papers Development (SOW 2.2): Our research, reporting, and critical infrastructure subject matter expertise provides SOPD with national, targeted, qualitative, and quantitative findings. Our reports helped SOPD gauge the effectiveness of its programs, promote best practices, share information, and better manage all-hazards risk. For example, the Team assisted the NIAC in researching and writing seminal papers on infrastructure partnerships, resilience, risk, and information sharing. The findings were pivotal to NIAC and DHS efforts to stand up the Sector Partnership Model. We provided research reports on the role of SSAs in building resilience, the importance of partnerships to infrastructure risk management, and numerous sector-specific issues. **Figure 4-1** shows our findings report development process. We can conduct data-gathering activities during the research process.

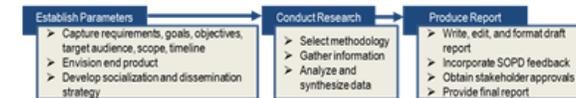


Figure 4-1. Team Acme's Findings Report Development Process. Team Acme will use the same process to develop findings papers that we used to help NIAC and DHS stand up the Sector Partnership Model.

These include literature reviews and media analysis; roundtable discussions with infrastructure owners and operators, industry experts, academia, or law enforcement; conferences and

Editing for Better Section Flow



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Use the 8 Ws to structure sections more persuasively.

- Section flow should go from general to specific, from less detailed to more detailed.
- Use the right order of the 8 Ws to organize information in a more complete and persuasive manner:
 - Why
 - What
 - Who
 - How
 - When
 - Where
 - Wow
- Read the section carefully; does it discuss the 8 Ws in the right order?
- Issue data calls to writers when a “W” is conspicuously missing.
- Consider adding sub-sections and bolded headings within the section to draw attention to the structure.
- Any section over two pages needs subsections.

Higher level summary sections - X or X.X outline levels

Why: Customer problem, challenge, or key risk factor behind the requirement

What: What do we propose to do in response to the requirement?

Who: Who exactly is going to do this part of the work, by name and title?

How: Step-by-step approach with benefits to the customer and risk mitigation

When: In what sequence are we going to do it, per schedule or when have we done it before?

Where: Indicate the location or facility, or say where we have done it before successfully

Wow: Powerful section conclusion

Restructuring for More Persuasive and Proportionate Paragraph Flow



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Just like in food presentation, negative space makes your writing more digestible.

- Ensure paragraphs in a section are sequenced correctly; ideas should flow logically and build on each other.
- For hardcopy, the most readable paragraphs are no more than 10 lines long and no more than 5 sentences per paragraph.
- If page limits allow, add more negative (white) space to make your proposal easier to digest.
- Ultimately, each paragraph should be dedicated to a single idea, but paragraph spacing is purely visual in nature: it's there for the eye to rest.
- Left alignment is now preferred for readability.



Revising Introductory Sentences



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Most sections will have weak introductory sentences; moderate editing tends to add polish and persuasiveness to the sections.

- The introductory sentence to a section should not be:
 - A regurgitation of the RFP requirement to which you are responding
 - A self-serving statement that says why you are the best (without the benefit to the customer)
 - Simply a fact, without a specific point in mind
- Good introductory sentences include:
 - The “why” behind the requirement (business reason, risk reduction)
 - Key challenge or customer’s hot button
 - The point of the section—usually in the form of a win theme
- Look for ways to add more benefit and proof language right into the introduction or a hook to get the evaluator to read the rest of the paragraph.



Organizing Unfocused Material

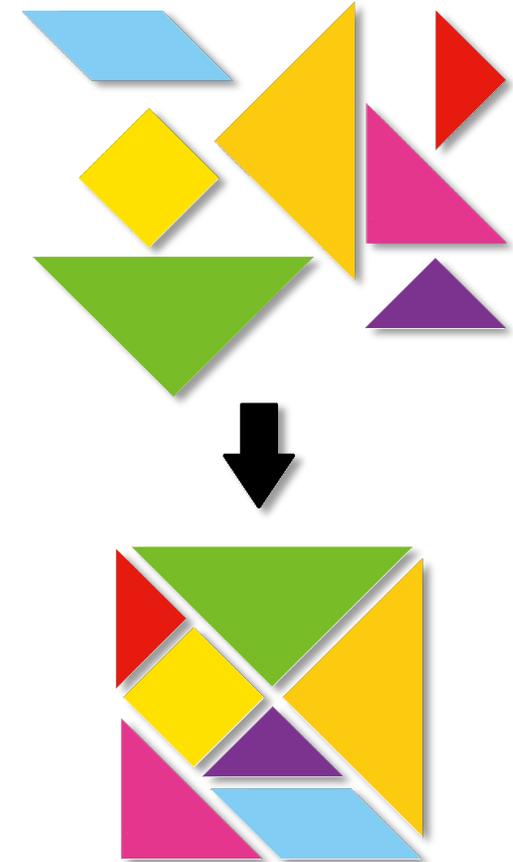


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Find the idea, and then find the benefits and proof.

- Read through the material once, and then try to say aloud or write down the central idea in plain English.
- Try mind mapping to figure out the point.
- If you can't find a main idea, refer back to the RFP to find out what the section is supposed to address.
- Look for nuggets of information to salvage to support the central idea you found.
- Make a note of any missing information you need to complete the section.



Revising for Consistent Voice, Even With Multiple Authors



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Your job is to enforce consistency in syntax, diction, and punctuation.

- Every writer has a unique voice, consisting of the individual way he or she uses syntax, chooses words, and punctuates sentences and paragraphs.
 - One writer may favor sentences consisting of two independent clauses joined together, frequently use the word “very”, and use em dashes to set off parenthetical statements.
 - Another may have a tendency to write run-on sentences with many e.g.s in them and use two nouns or two adjectives together.
- Editors also have their own voices; it is your sense of what “sounds right”.
- To revise for consistent voice, come up with a detailed scheme of syntax, word use, and punctuation, and ensure that all the text in the document adheres to the same rules; document in a style guide when using multiple editors.



Editing, Titling, and Captioning Figures and Tables



- Editing a graphic occurs at two levels: evaluating the concept of the graphic, and examining the content for accuracy and aesthetics.
 - Check to make sure the graphic conveys its point clearly and accurately, and that it is relevant to the discussion.
 - Look at each word in the graphic for typos, and make sure there are no mistakes in content.
- Title and caption all visuals in the document, including photographs, tables, spreadsheets, drawings, charts, and graphs.
- Titles should accurately and succinctly describe the graphics.
- Action captions serve multiple functions:
 - Help the reader draw the conclusion you intended
 - Clearly link features to benefits
 - Allow the visual to explain itself without making the evaluator search the body text for clarification

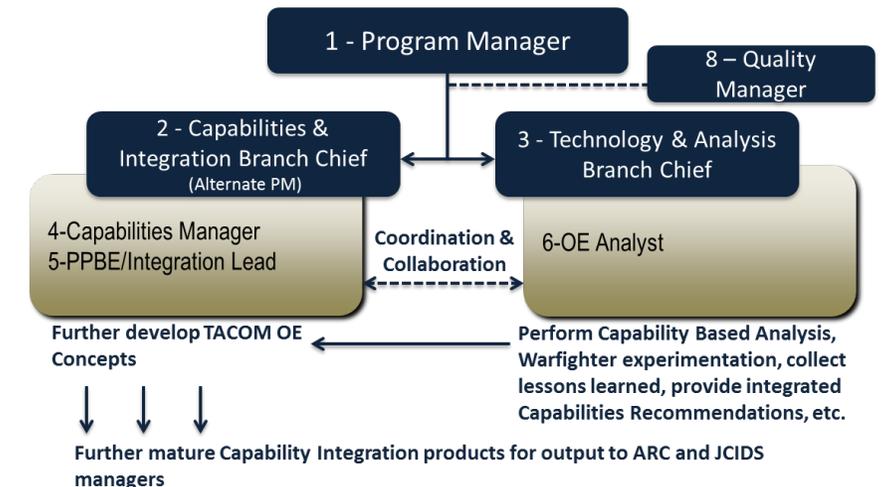


Figure #. Title. Action Caption.

Properly Introducing Figures and Tables



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Cross-references to figures and tables in the text should arise conversationally.

- Figures and tables should always be introduced, or at least referenced, in the main text.
- The introduction should nearly always precede a graphic or table; in severely page-limited proposals, this rule can be broken.
- Read the paragraphs above or next to the exhibit to see where you would bring it up.
- Look for text explaining the figure; this is where you need to add your introduction.
- If no text exists, create it; imagine standing in front of the evaluators, with the figure or table on an easel next to you.
 - What would you explain about a figure?
 - What is self-evident and doesn't require text?

Example:

Figure 3.1-2 showcases our ten-step approach to curriculum development.

Tips:

Bold the figure reference (similar to section cross-references) the first time it appears in text.

Don't use *above*, *below*, *that follows*, *the following*, etc.

Some style guides require the figure title to appear with the first reference; it has become an obsolete rule in page-limited proposals.

More About Exhibits



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Remember: Consistency breeds trust, so pick a methodology and apply it consistently throughout the proposal.

- You can distinguish between tables and figures, or call everything an “exhibit”.
- Figure numbering is consecutive in short proposals (Figure 1, 2, 3, etc., or up to certain section level (Figure 1.1-1, 1.1-2, etc.).
- Add Figure number, title, and action caption.
- Ensure consistent punctuation in the Figure caption.
 - **Figure 1-1: Organization Structure.** *Our organization fully aligns with CBP divisions to best support agency’s mission.*
 - Use a colon, dash, or period to separate the number and title.
- Use title and caption above the tables and below the figures.
- Some people choose to caption only figures, but not tables.
- It is not necessary to caption and number focus boxes.

Figure title answers the question:

- What is it?

Action caption answers the questions:

- What does it do?
- What does it do better, faster, cheaper, or with reduced risk?
- What is the benefit to the customer?

Tip:

To save space, skip the title; instead just write a complete caption that answers all four questions. Place it after the figure number.

Exercise



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Put your newly-learned structural editing skills to work.

- Perform a moderate edit on the handout.
- What types of issues are you finding with the text?

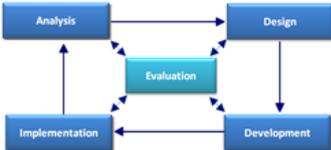
Case Study 6



4.4 Subtask 2.C Training and Outreach Support Tasking (SOW 2.C)

We use a systematic ADDIE approach when creating education and training products. It begins with meeting the SOPD, critical infrastructure protection sector sponsors, and SMEs to identify the topics and tentative development schedules for each of the training products:

- Two training courses related to existing Dams Sector technical workshop, and two to four new training courses, course topics to be identified.
- Webinars (3-4)
- 25-30 Antiterrorism and five Supply Chain workshops nationwide per year.
- Web based training, with the number and course topics TBD.



Updates to existing courses and training materials to support advances, revisions, adaptations, or updates to national critical infrastructure policy, the NIPP, and the SSPs.

Following the meeting with SOPD, Team Acme will conduct separate focus group meetings with SOPD and relevant SMEs as necessary for each individual project in order to verify the target audience and identify tasks performed by the target audience; obtain and review existing materials and resources; determine gaps that need to be addressed in the training; identify or develop course objectives; and identify and validate the topics to be addressed in the training. Following the meetings, a narrative will be developed that crosswalks tasks and learning objectives to the proposed content. From there, course design and development will be started.

Our instructors will be identified prior to course delivery, with a preference for whomsoever helped develop the curriculum. Our instructors will submit reports within five working days of course delivery. We will agree upon report content prior to course delivery. The report includes a summary of the lessons learned and participants' reactions; instructor comments, significant issues and recommendations identified by the participants or instructor; and SOPD performance metrics. Our training solutions ensure mission effectiveness, improve performance, and provide measurable results by assessing customer needs and developing solutions using a predictable, methodical learner-centered approach. We employ a systems approach for determining training tasks/job skills, designing, and developing training curricula and training solutions. Our approach is based on the ADDIE model to continually develop training programs that effectively match SOPD requirements. The ADDIE model assesses the system and describes the goals that need to be achieved, designs a method to achieve the goals, and develops, implements, and evaluates the designed method.

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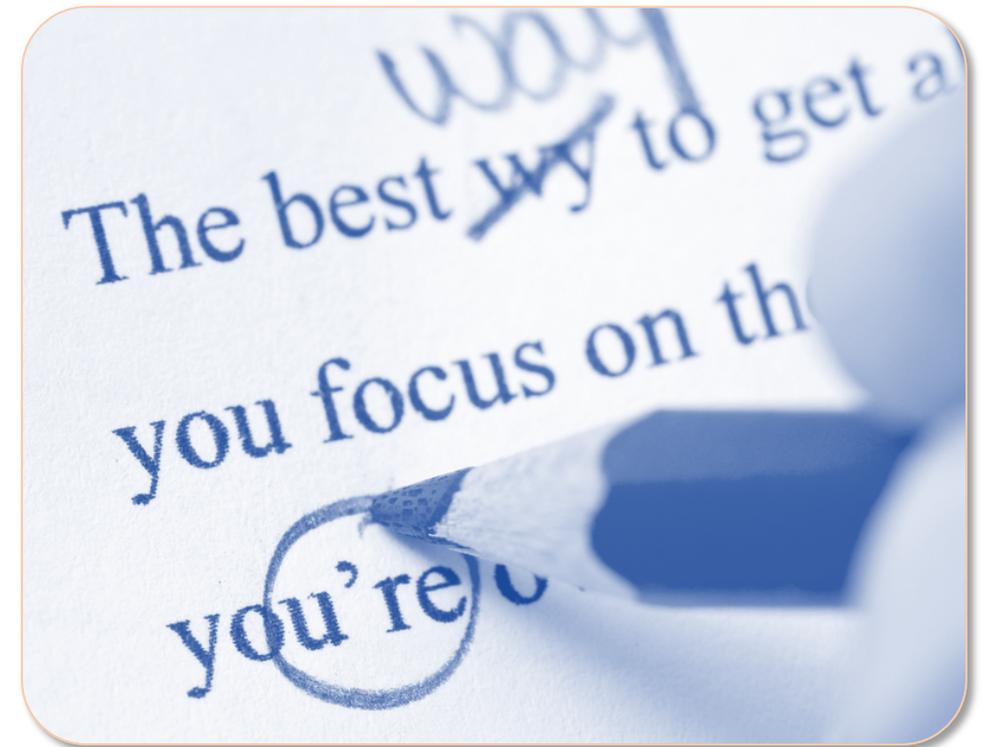


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Copy Editing and Proofreading

Module 7



How the Plain Writing Act Affects You

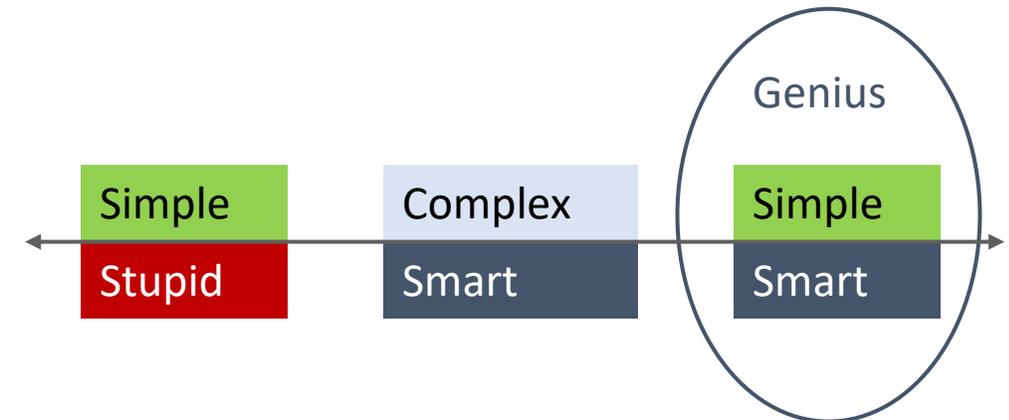


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Even the Government is trying to simplify the language in its documents, to reduce red tape and increase clarity; we should do it, too.

- The Plain Writing Act of 2011 requires Government agencies to pay attention to clarity of language in forms, instructions, letters, and information for the public.
- It is critical that contractors follow suit.
- The key elements of plain writing are:
 - Identifying your audience and the point you're trying to make
 - Putting the most important point at the beginning
 - Using common, easily-understood words
- The most recent guidelines are found at <http://www.plainlanguage.gov/howto/guidelines/FederalPLGuidelines/FederalPLGuidelines.pdf>



Editing Automation Techniques



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Microsoft Word has a number of features that will make your job much easier, if used correctly.

- Adding and re-defining entries in your AutoCorrect database
- Using AutoFormat to apply styles automatically as you edit
- Automating certain kinds of text entry with Complete Text as You Type
 - Type DOTM and get DOTMLPF.
- Customizing the database of Word's Spelling and Grammar Checker
- Using CTRL-F to identify problem areas and make global changes



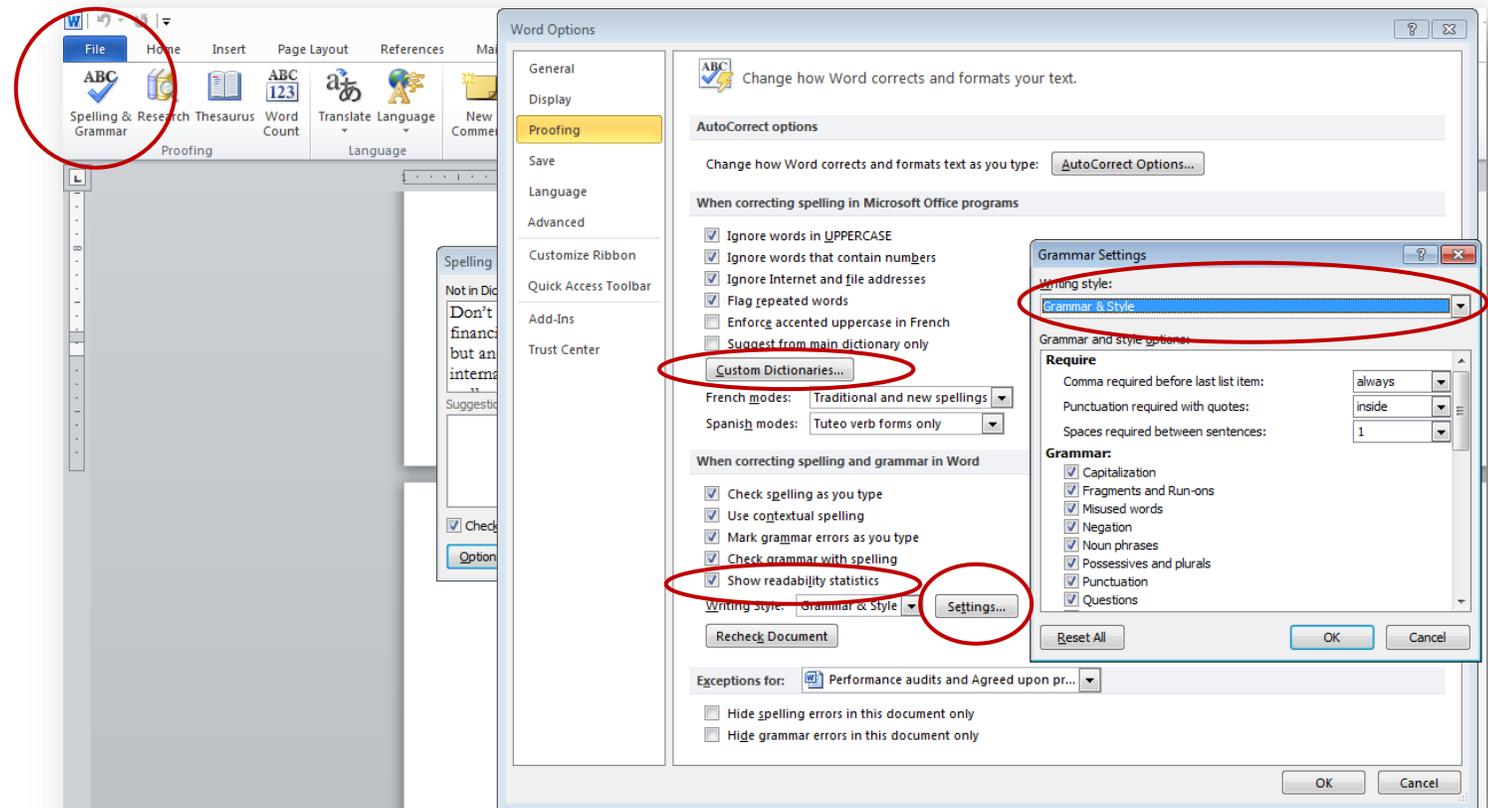
Using Spelling and Grammar Tools Effectively



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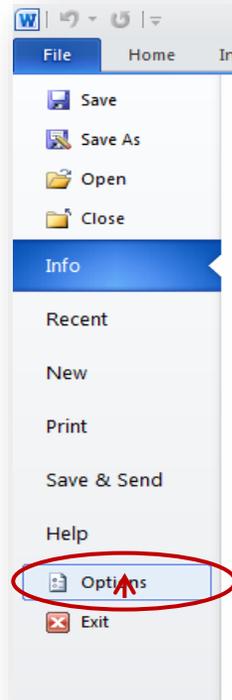
- Make use of *ignore* or *change all* to automatically correct or ignore words.
- Add commonly-flagged-but-correct words to your custom dictionary.
- Enable Grammar & Style checking in *Proofing* and *Customize Options*.
- Recheck document to find words you ignored earlier.



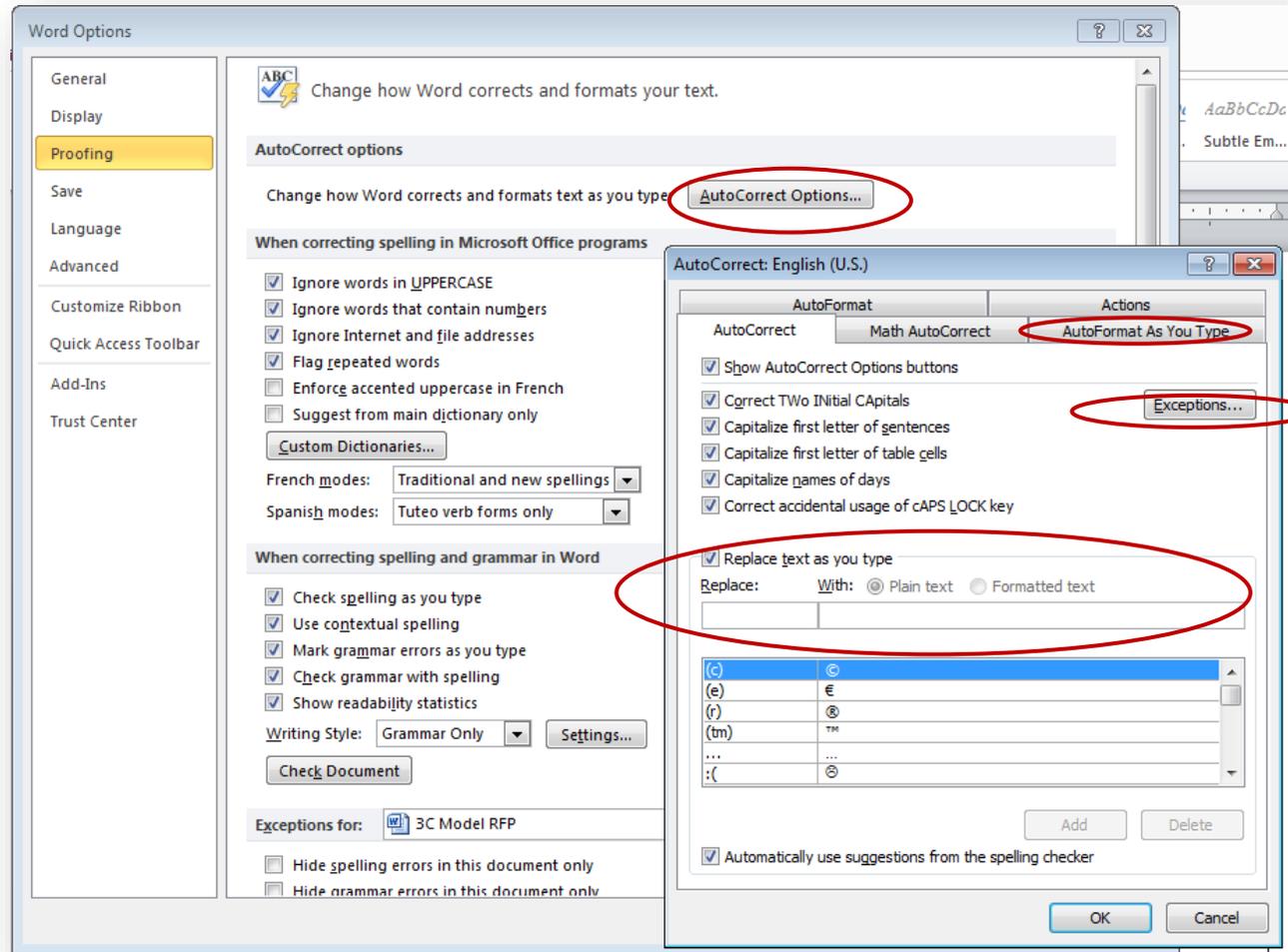
Using the AutoCorrect, AutoFormat, and Other Auto Features



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An alternative place to find the Proofing menu.



Making Global Changes and Using Find and Replace Effectively

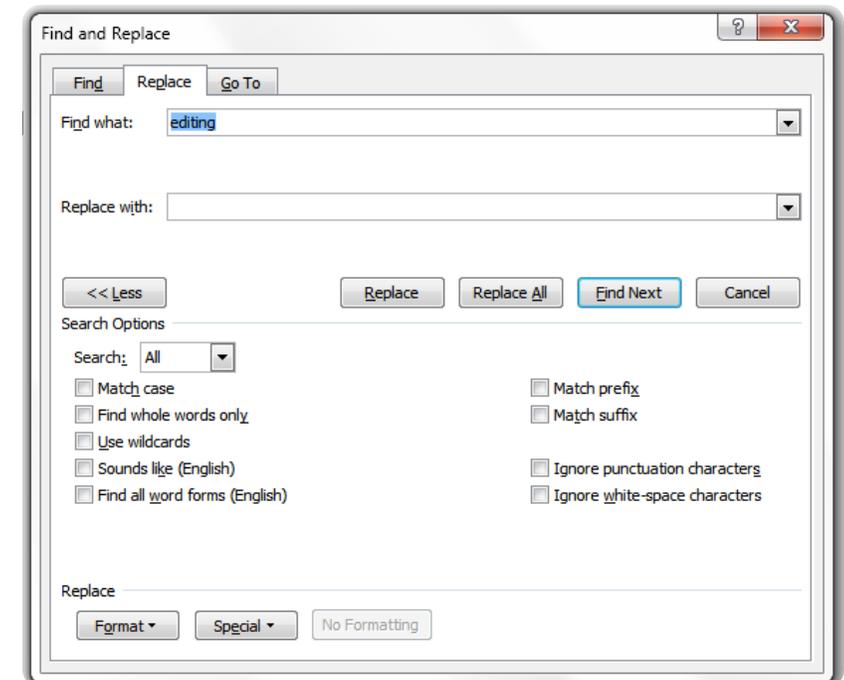


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Find and Replace is a powerful tool, but it must be used carefully.

- Open up the Find and Replace tool by hitting Ctrl+H.
- Make use of the Find and Replace options, such as wild cards, “Match case”, and “Find whole words only.”
- When making a global change, it’s always safest to look at each instance the Find and Replace tool finds, and then accept or reject the proposed change.



Using Wildcards



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Wildcards speed up the global corrections process and help enforce consistency.

- Look through the information.
- Play with the searches in a document.

1 | Page



Using Wildcards Find and Replace in Word

1. Press CTRL+H
2. Select the **Use wildcards** check box.

(If you don't see the **Use wildcards** check box, click **More**.)

When the **Use wildcards** check box is selected, Word finds only the exact text that you specify. Notice that the **Match case** and **Find whole words only** check boxes are unavailable (dimmed) to indicate that these options are automatically turned on. You can't turn off these options.
3. Do one of the following:

To choose a wildcard character from a list, click **Special**, click a wildcard character, and then type any additional text in the **Find what** box.
 - To search for a character that's defined as a wildcard, type a backslash (\) before the character. For example, type \? to find a question mark.
 - You can use parentheses to group the wildcard characters and text and to indicate the order of evaluation. For example, type <(pre)*(ed)> to find "presorted" and "prevented".
 - You can use the \n wildcard to search for an expression and then replace it with the rearranged expression. For example, type (Team) (Acme) in the **Find what** box and \2 \1 in the **Replace with** box. Word will find **Team Acme** and replace it with **Acme Team**.

TO FIND	TYPE	EXAMPLE
Any single character	?	s?d finds sat and set.
Any string of characters	*	s*d finds sad and started.
The beginning of a word	<	<(inter) finds interesting and intercept, but not splintered.
The end of a word	>	(in)> finds in and within, but not interesting.
One of the specified characters	[]	w[io]n finds win and won.
Any single character in this range	[-]	[r-]ight finds right and sight. Ranges must be in ascending order.

Editing for Conciseness



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Concise writing uses the strongest nouns and verbs available to reduce word count and increase precision.

- Replace strings of dull words with a single, more-powerful and precise word.
 - Use CTRL+H, type “tion” in the “find” box and search through your document.
 - **Three problems with “tion” and “ment” words:**
 1. 3-4 syllable-long words cause evaluators to stumble.
 2. Good writing is all about mental pictures, and they usually don’t create a picture in the reader’s mind.
 - If it says “program manager” you are likely to see a PM in your mind’s eye; if it says “allocation” you will see nothing).
 3. These words come from a good verb (e.g. observe) and adding “tion” or “ment” to turn it into a noun (“observation”).
 - To make a sentence, you THEN have to add ANOTHER verb, usually a boring one like “is” or “make” (e.g. “Make an observation”).
- The best way to eliminate the “tion” word is to turn the noun back into its original verb: We observed the problem; the PM assigned the work.
- Check every word to make sure that it is adding something important to the sentence.
- Combine sentences that can be combined.

Wordy: Our portal **has made available many of the criteria you can use for making a decision on** the best path of action.

(22 words)

Concise: Our portal presents criteria for determining the best action path.

(10 words)

Trim Page Count by Eliminating Unnecessary Words



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Excessive use of adjectives is akin to drowning yourself in perfume.

- Remove superlative adjectives and adverbs.
 - Adjectives are imprecise and vague noun “amplifiers”; they often hide instead of reveal (e.g. good, strong, etc.).
 - Adjectives mean different things to different people; when words are imprecise, you lose control over the meaning the evaluator takes in, which may cost persuasive power.
 - Adjectives sound too hype-y and sales-y while the evaluators are looking for solid offers from sources they can trust.
- Eliminate unnecessary determiners and modifiers that don’t add to the story.
- Omit repetitive wording: “approach and methodology” is simply “approach” (unless RFP requires both).
- Avoid over-using “There is” or “It is”.
- Get rid of “we understand”, “we believe”, “we strive”, “we are committed,” “in order to”, and other fluff.



Eliminating Passive Voice or Determining When It Is Appropriate



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Your goal is to have zero passive voice unless contextually necessary; even figure callouts should be active.

- Passive voice is acceptable when the subject of the sentence is unknown or irrelevant, when the object is more important than the subject, or when talking about a general truth.
- It may also be appropriate when discussing victims who are acted upon.
- If a sentence written in passive voice does not meet any of those criteria, then you should convert it to active voice.
- To convert passive voice to active voice, find the subject of the sentences and put that first.

Example:

“The schedule is developed by the transition manager” becomes
“The transition manager develops the schedule”

Grammar Gaffes Every Proposal Editor Should Heed



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Make it your habit to read about grammar, writing, and good business writers.

- Using two spaces between sentences.
- Improper heading and subheading capitalization (and inconsistent capitalization in general).
- Failing to use smart quotes (automatic quotes that look like 66 and 99 in Word).
- Overlooking agreement errors (subject-verb and pronoun-antecedent).
- Missing parallelism.
- Dangling modifiers (an add-on to the sentence that confuses instead of clarifying).
- Usage problems such as insure/ensure.
- Inconsistent verb tense.
- Lack of guideposts in the document:
 - If a section is longer than two pages, break it into two subsections with headers.



Refresher for the Most Common Errors in Proposals



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Error	Examples of wrong usage	Examples of right usage
Using <i>shall</i> instead of <i>will</i>	Acme Co. shall deliver XYZ services to DOD	Acme Co. will deliver XYZ services to DOD.
Incorrect or inconsistent use of serial commas	red, white and blue	red, white, and blue (Oxford comma)
Nonwords and nonphrases	orientate; irregardless; in regards to	orient; regardless or irrespective; in regard to or regarding
Redundancies	Reason why; close proximity	One or the other, not both.
Transposing “that” and “which”	...career which interests you; ...a note, that is overdue, to explain...	...career that interests you.; ...a note, which is overdue, to explain... (better: an overdue note)
Using hyphens and spaces when an en or em dash is needed	2001-2005; He could--or should--have completed; He could - or should - have completed.	2001–2005; He could—or should—have completed.
Transposing and mispunctuating e.g. and i.e.	...a small gift, i.e. a meal or a plant; He did not respond: eg: he declined.	...a small gift (e.g. a meal or plant); He did not respond, i.e. he declined.
Using an ampersand instead of “and”	Methodology & process	Methodology and process
Statements that sounds fake	customer-focused, quality-focused We are committed to... Top-quality Full-service, “Uniquely qualified” or “unique”, “The right choice”, “Trustworthy” or “You can trust us...”	Delete

Making Finer Adjustments to Tone and Rhythm



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Improving tone and rhythm requires careful attention to the meaning and sound of the words in the text.

- A paragraph containing multiple types of sentences is easier to read; vary between simple sentences containing one subject-verb clause and complex ones containing more than one.
- Trim out any writing that is overly-formal, ponderous, or that uses complicated words where simple ones will do.
- Be careful to keep only customer-specific buzzwords.
- Don't try too hard to impress the evaluators; inform them and let the facts speak for themselves.



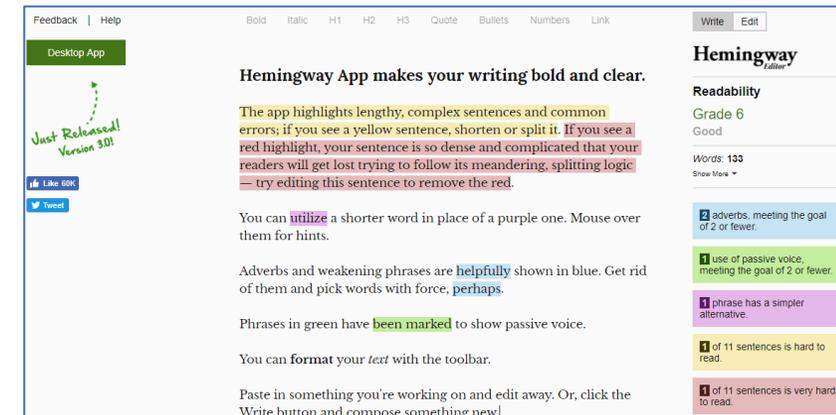
Editing Automation and Document Refinement Tools



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- Hemingway App (checks readability and other writing problems, free if used online).
- PerfectIt (tab in Word, checks for inconsistencies that are hard to catch – periods after bullets, inconsistent use of capitalization, etc.).
- WordRake (tab in Word, cuts out the unnecessary words or phrases that creep into your writing).
- Grammarly (grammar checker and proofreader superior to Word).
- ProWritingAid (Analyzes writing and reports on areas such as overused words, writing style, sentence length, grammar and repeated words and phrases).
- Document Analyzer by Atebion (shreds RFP, analyzes for readability and bad language).
- VisibleThread (shreds RFP, analyzes for bad language).



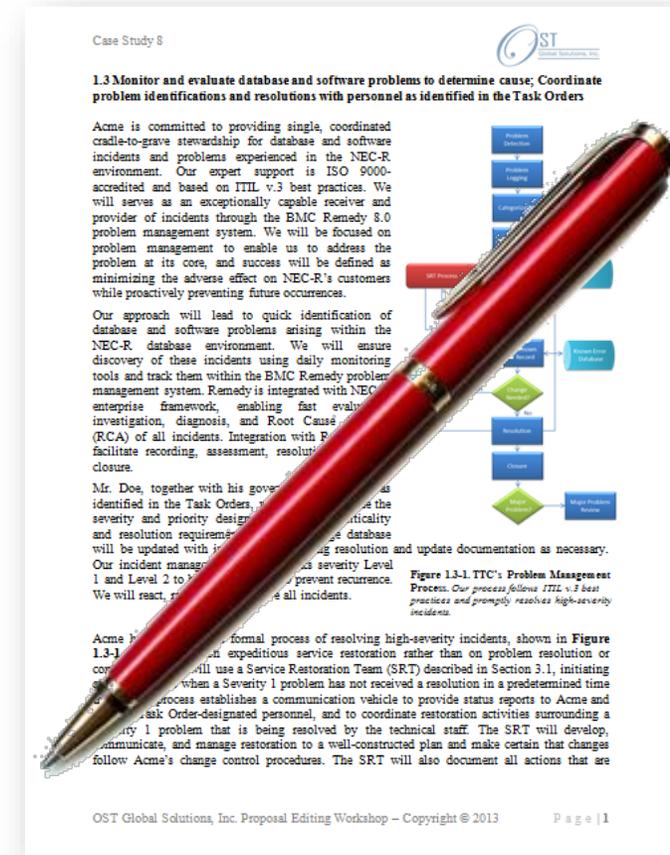
Exercise



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Put your copy editing and proofreading skills into practice.

- Use Hemingway App (www.hemingwayapp.com) – cut and paste text straight into the app. Get rid of as much color as possible.
- Check the readability statistics first.
- Copy edit the handout either using the app or in Word using CTRL+H, Word automation, and manual methods.
- Check the statistics in Word to see how the section has improved.





Editing Resumes and Past Performance

Module 8

JOHN DOE
Full Address • City, State, ZIP • Phone Number • E-mail

WORK EXPERIENCE:

AMERICAN EAGLE City, State
Sales Associate July 2009 - present

- Collaborated with the store merchandiser creating displays to attract clientele
- Use my trend awareness to assist customers in their shopping experience
- Thoroughly scan every piece of merchandise for inventory control
- Process shipment to increase my product knowledge

PLANET BEACH City, State
Spa Consultant Aug. 2008 - present

- Sell retail and memberships to meet company sales goals
- Build organizational skills by single handedly running all operating procedures
- Communicate with clients to fulfill their wants and needs
- Attend promotional events to market our services
- Handle cash and deposits during opening and closing

EDUCATION:

UNIVERSITY OF MINNESOTA
College of Design

- Bachelor of Science in Graphic Design
- Cumulative GPA 3.93, Dean's List
- Twin cities Iron Range Scholarship

Editing Past Performance Sections for Compliance, Relevancy, Length, and Consistency



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- Check the template for compliance.
- Ensure consistency in addresses, dates, numbering, punctuation, the way the contract is presented in the contract overview and other information.
- Ensure length and level of detail are consistent between different past performances.
- Reduce any information not directly-relevant to the contract.
- Double-check contact information to see if it is still valid by asking if the proposal team has pre-called references.

1. Project: Title	
2a. Reference/Technical POC: Name: Address: Phone: Email:	2b. Reference/Contracting POC: Name: Address: Phone: Email:
3. Contract Number: xxx	4. Contract Period of Performance: xxx
5. Contract Type: xxx	6. Contract Value: xxx
7. Contract Overview: Xxx	
Relevancy to the Scope of Work:	How Our Team Meets or Exceeds the Requirement:
<i>SOW</i> 3.1	xxx
<i>SOW</i> 3.2	xxx
<i>SOW</i> 4.1	xxx
<i>SOW</i> 4.2	xxx
<i>SOW</i> 4.3	xxx
<i>SOW</i> ...	xxx
Problems Encountered and Their Resolution:	
<p>IMPORTANT NOTE FOR YOU WHEN YOU ARE PREPARING THIS PAST PERFORMANCE: Addressing a problem head on and showing your own twist on how you solved that problem is your chance to tell your side of the story about how conscientious you are. Odds are, they know anyway (or will find out soon), so this is your chance to acknowledge it before it's too late.</p>	

Exercise



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Practice working with a resume

- Identify how to cut the resume down to 2 pages.
 - What areas would you cut wholesale?
 - Are there any tricks you could use in trimming, but not losing, valuable information?

Case Study 9

George Smith – Program Manager Resume No. 1 of 8

Current Employer	Location	Availability	Security Clearance	
Acme, Inc.	Rockville, MD	100%	Secret	
Summary Qualifications				
<p>Mr. Smith has excelled during over 42 years of progressively responsible experience in the operation, maintenance and repair of US Navy ship Hull, Mechanical, Electrical, and Electronic systems and equipment. This includes nearly 27 years experience managing the design, test, maintenance or operation of Hull, Mechanical, Electrical, or Electronic Systems and equipment and nearly 10 years experience managing engineering and logistic projects involving development and installation of alterations on Navy ships. While in the US Navy, his demonstrated technical, management and leadership excellence earned him the rank of Commander (O-5) Limited Duty Officer, specializing in ship system maintenance, test, repair and operation. In the private sector, Mr. Smith has directly managed several contracts of scope and complexity equal to this solicitation. In this 42-year career, he has directly worked at, managed contract programs for, and interfaced with Naval Sea Systems Command, Naval Surface Warfare Center, Naval Shipyard, SUPSHIP, and Type Commander organizations at all levels.</p>				
Relevancy of Education, Background, and Experience				
<p>RFP Requirements: 15 years experience in management of engineering projects involving maintenance, repair, testing, product improvement, or alteration of naval ship Hull, Mechanical, Electrical, or Electronic systems and equipment including 5 years of associated program management. The 15 years shall include the following, which could have been obtained concurrently:</p> <ul style="list-style-type: none"> • 10 years of working experience in engineering projects involved in design, test, maintenance or operation of Hull, Mechanical, Electrical, or Electronic Systems and equipment. A bachelor's degree in a non-engineering discipline with an advanced degree in business administration may be substituted for this. • 8 years working experience in engineering and logistic projects involving development and installation of alterations on Navy ships. A degree in Engineering or Naval Architecture from an accredited college or university or possession of a professional engineer's license may be substituted for this. 	<p>How Our Candidate Meets the RFP Requirements: Mr. Smith has acquired over 27 years of management experience in the required areas in the period from 1980 to the present, while employed as program manager for 1.7 years at Acme, Inc.; 5.7 years at QED Systems; 0.5 years at Analysis & Technology; 1.5 years at Information Technology Solutions; 1.3 years at Envision Technix; and 18 years as a U.S. Navy Limited Duty Officer in a variety of management roles.</p> <ul style="list-style-type: none"> • Over 42 years of working experience in engineering projects involved in design, test, maintenance or operation of HM&E and Electronic Systems from 1965 to the present while employed for 27 years as discussed above, and 15 additional years as a Fire Control Technician in the US Navy. • Nearly 10 years working experience in engineering and logistic projects involving development and installation of alterations on FFG, CG, LHA and MHC class ships from 1995 to the present and all class Navy ship classes in the course of his 28 year program management career. 	<table border="1"> <tr> <td>Significantly Exceeds</td> </tr> <tr> <td>27 years of experience</td> </tr> </table>	Significantly Exceeds	27 years of experience
Significantly Exceeds				
27 years of experience				

Resume 3 of 8, Program Manager • Page 1 of 4



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Last Touches

Module 9



10 Items to Check in a Proposal for Consistency and Professional Appearance



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1. Header styles are applied consistently.
2. Bulleted lists use the same bullets and indentation.
3. Consistent style is used for body text.
4. Header levels are balanced throughout the document outline.
5. Sections longer than two pages are broken down into subsections.
6. Page headers and footers are consistent across sections; if the requirement is to print double-sided, pagination alternates and sections start on odd pages, with blank pages inserted where needed.
7. Check font colors to make sure they are the same RGB values throughout; note exhibits that need to be put in the same palette.
8. Page numbers in the document increment correctly across section breaks.
9. Figure and table numbers increment correctly, and none are missing.
10. All exhibits are introduced in the text and have titles and action captions.

What to Look for When Editing for Aesthetics



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Evaluate the template of the document for color, layout, compliant margins, and a balanced, attractive look overall.

- Check the style sheet to make sure there are definitions for each style used in the document.
- Look at how graphics are placed to make sure they are within the margins and that the text that flows around them is readable.
- Print out the document in hard copy and look at it page-by-page to check for excessive white space, any misplaced text or graphics, or other unattractive features.
- Make sure sections don't start in inappropriate locations (e.g. at the very bottom of a page with no text to follow).

Aesthetics

Rules for Desktop Publishing for Editors



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- Use only one space after punctuation, periods included. IF you justify the text, Microsoft Word automatically adjusts spacing for the best legibility.
- Use a single return to start a new paragraph, and adjust spacing using Word line spacing settings and text styles.
- Use fewer fonts; one for text, one for headers, and another one for captions is plenty.
- Use ragged-right or fully justified text appropriately.
- Use centered text sparingly. Left-aligned is ideal now.
- Use the alphabet-and-a-half rule to choose the right font size and decide whether you can wrap graphics or not .
- Minimize the use of all caps.
- Use proper typographical punctuation.
- Don't use frames, boxes, or borders for no reason; they look dated, like white socks and a dress.
- Flag any graphic that contains clipart for rework.
- Use more white space, if you can.

Alphabet-and-a-half line length rule:

When inserting focus boxes and graphics and wrapping text, the alphabet-and-a-half rule places the ideal line length **at 39 characters regardless of type size**. Measure the line length in inches or picas for your chosen body copy font using the alphabet-and-a-half rule. This is one of the measurements you'll use in finding the ideal line length/column width for your proposal (if you have a choice, of course).

Lines of type that are too long or too short slow down reading and comprehension. Combine the wrong line length with the wrong type size and the problem is magnified.

Lines of type that are too long or too short slow down reading and comprehension. Combine the wrong line length with the wrong type size and the problem is magnified.

Lines of type that are too long or

Ensuring All Changes Are Made and Preventing New Errors

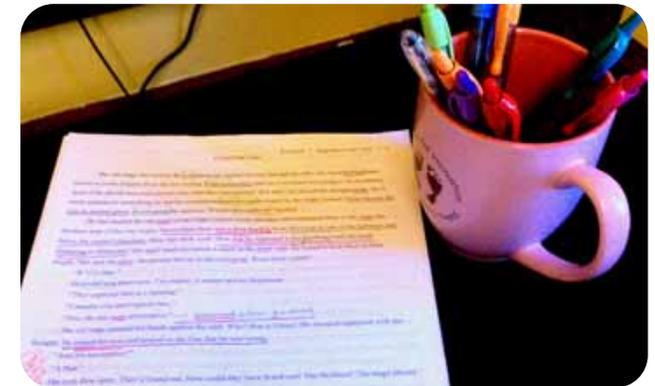


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Proofreading is a job only for the most observant and methodical people.

- Check the edited document against the redlines word-for-word, confirming that each change has been made.
- When editing electronically with Track Changes, proofreading is a fairly simple task.
 - Do not accept or reject all changes in a document.
 - Instead, examine each one to make sure it does not introduce new errors.
- Proofreading from hard copy redlines to the document is more tedious.
 - It's easiest if you print out a copy of the edited document and compare hard copy to hard copy; use highlighter to check off all the changes that have been inserted.
 - You can also compare the redlines to the document on the screen and use the CTRL+F function.



Generating an Acronym Table



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There is no reason to generate an acronym table manually in the abundance of tools.

- Recommended software: AcroSeeker by Scion Analytics, Formerly Atebion, LLC – scionanalytics.com.
- Can come with the Document Analyzer suite.
- Finds all acronyms in a document and compiles them in a Word table.
- Includes acronyms without a definition.
- Paid edition allows to analyze all proposal volumes at once.
- Has dictionaries and allows you to create your own dictionaries for reuse.

Atebion LLC - AcroSeeker's Acronym Report for T-ADC(X) Ship RFP Section C.rtf

Report generated on Wednesday, October 18, 2017 2:17:21 PM

Summary

214	20	17	3	2	8	0
Sentences	Acronyms Found	Acronyms Defined	Acronyms Not Defined	Acronyms Definition via Dictionary	Acronyms Multi-Defined	Acronyms Defined Only

Acronyms Found

CAGE	Commercial and Government Entity
CFM	Contractor Furnished Material
CONREP	Connected Replenishment
CPRs	Cost Performance Reports
CSA	Configuration Status Accounting
CWBS	Contractor Work Breakdown Structure
DRL	Data Requirements List
EVMS	Earned Value Management System
GFE	Government Furnished Equipment

File Name: T-ADC(X) Ship RFP Section C.rtf

Acronym	Definition
CAGE	Commercial and Government Entity
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CONREP	
CPRs	Cost Performance Reports
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CWBS	Contractor Work Breakdown Structure
DRL	Data Requirements List
EVMS	Earned Value Management System
GFE	Government Furnished Equipment
GFM	Government Furnished Material
HE	Human Engineering
HMMP	Hazardous Material Management Plan
IBR	Integrated Baseline Review
ILSMP	Integrated Logistics Support Management Plan
LSI	Large-Scale Integration
OEM	Original Equipment Manufacturer
PMR	Program Manager's Representative
PPPP	Program Pollution Prevention Plan

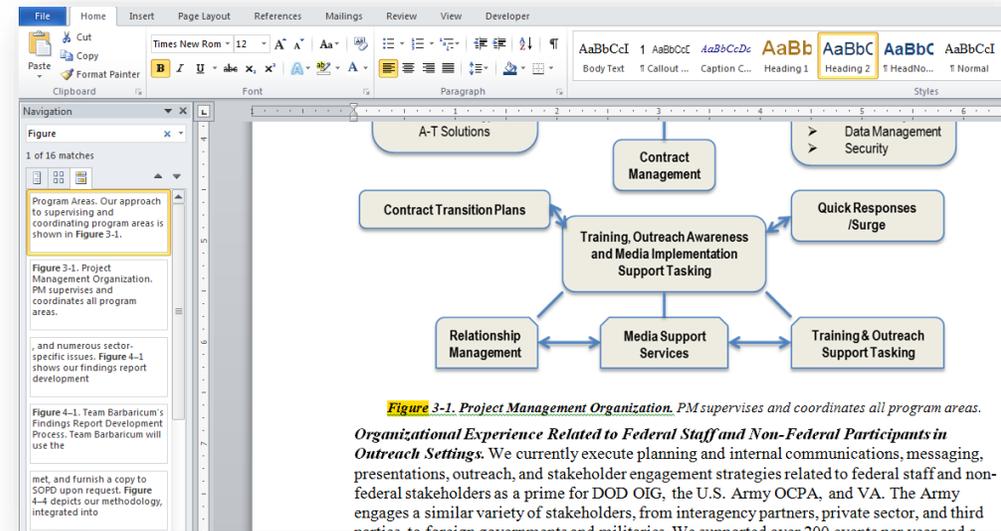
Checking Numbering and Cross-Referencing for Figures and Tables



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- First, review the document to ensure that all captions use the Caption style.
- Build an automatic table of figures and table of tables through the References ribbon in Word to check for missing or out-of-order numbers.
- To check cross-references, search for the word “figure” or “table” using Word’s Find and Replace feature.
 - The sidebar will show you all instances where the word appears in the document.
 - This allows you to quickly check for missing cross-references.



Modifying Styles If Needed



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In a pinch, sometimes it is easier to make a fix rather than introducing another round of changes and sending a proposal to a desktop publisher.

The screenshot shows Microsoft Word with the 'Modify Style' dialog box open for 'Heading 1'. The dialog box displays the following information:

- Name:** Heading 1
- Style type:** Linked (paragraph and character)
- Style based on:** Normal
- Style for following paragraph:** Normal
- Formatting:** Cambria (Headings), 14 pt, Bold, Font color: Accent 1, Space
- Font:** (Default) +Headings (Cambria), 14 pt, Bold, Font color: Accent 1, Space
- Before:** 24 pt, Keep with next, Keep lines together, Level 1, Style: Linked
- Based on:** Normal
- Following style:** Normal
- Add to Quick Style list
- Automatically update
- Only in this document
- New documents based on this template

The 'Change Styles' dropdown menu is also visible, showing options for 'Heading 1' such as 'Update Heading 1 to Match Selection', 'Modify...', 'Select All: (No Data)', 'Remove All: (No Data)', 'Delete Heading 1...', and 'Add to Quick Style Gallery'.

Cleaning up Style Sheets for Fast and Reliable Formatting

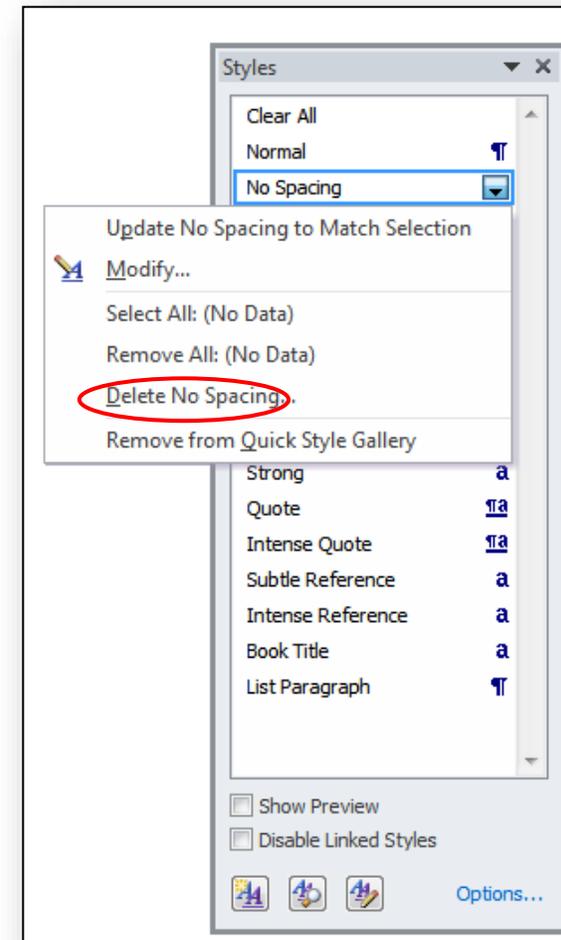


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De-cluttering styles early on will help keep the document clean.

- To prevent the style sheet from becoming crammed with unused styles, set default paste to text only.
- Ensure all styles are applied consistently throughout the document.
- To delete an unused style, open the Styles window, open the drop-down menu for the style, and select “Delete style”.



Generating or Updating the Table of Contents

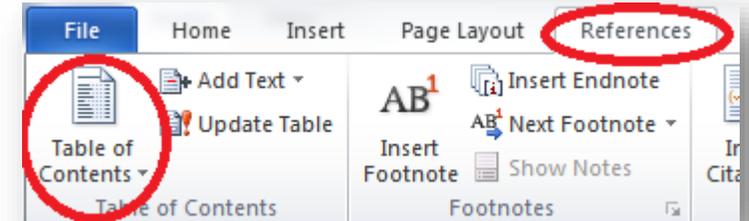


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If you don't have the luxury of a desktop publisher, it is an editor's job to ensure the document has a table of contents, and a table of exhibits.

- To generate a table of contents, select the “Table of Contents” option in the References ribbon.
- Note that this will not work properly unless you have consistently applied the Heading 1 style to your first-level headers, Heading 2 style to the second-level headers, etc.
- To update the table of contents, right-click on it, and either choose to update page numbers only or the entire table.



Recap and Summary



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Let's go over what we've learned.

- Name different techniques for cutting down the page count.
- List the editing automation features in Word.
- List the 8Ws for better section flow.
- What are some of the rules of introducing graphics in text.
- Name some of the items that impact a proposal's professional appearance.
- What is your biggest take-away from this course?



Thank You for Attending!



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