



OST GLOBAL SOLUTIONS



Desktop Publishing for Proposal Professionals

OST Bid & Proposal
Academy Course

www.ostglobalsolutions.com

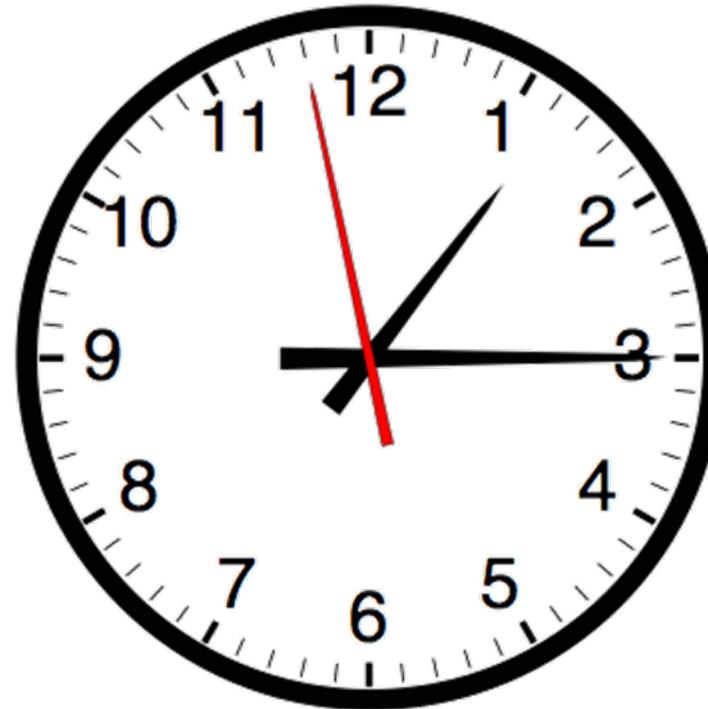
Agenda



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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*

Introduction and Learning Objectives



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Upon completing this course, you will have learned and be able to practice:

- Understanding desktop publisher's role and key attributes
- Locating all the key desktop publishing commands and functions in the Microsoft Word Ribbon
- Using the Ribbon, the Quick Access Toolbar, and keyboard shortcuts to save time on formatting and navigation
- Choosing a color palette
- Designing organized document templates and style sets
- Working with Microsoft Word's automated tools to create reference tables
- Importing raw content from multiple sources into a single file
- Implementing document design
- Inserting and captioning graphics
- Formatting text into tables, and captioning tables
- Completing a production run
- Conducting white glove reviews, aka book checks
- Testing soft-copy collateral
- Packing and labeling hard copies for shipment or hand-delivery
- Preparing receipts
- Completing electronic submissions using Adobe Acrobat

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 is Who



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- Your Name and Position
- An interesting fact about your life or career
- Your level of experience:
 - Beginner, intermediate, high-level?
- What are you looking to get out of this training?



- ❑ What makes a great desktop publisher
- ❑ Customizing your virtual workspace with the Word Quick Access Toolbar
- ❑ Tips and tricks to quickly navigate the document
- ❑ Importing text with Paste Special
- ❑ Introduction to the Word ribbon
- ❑ Using Format Painter



Module 1

INTRODUCTION

Characteristics of a Great Desktop Publisher



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Great desktop publishers have the patience of Job, are fast, and have great stamina

- Attention to detail, including editing glitches
- An eye for aesthetics
- Remaining cool-headed under pressure
- Understanding of composition and design
- Computer-savvy; Rather than panicking in the face of a mysterious formatting problem, ability to:
 - Remain curious and interested
 - Think the way the computer thinks about rendering a document
- Technical mastery of Microsoft Word and Adobe Acrobat Pro
- Ability to fix graphics issues in a pinch when a graphic artist is not available
- Understanding of the RFP and proposal constraints



Important requirement: *Have the latest versions of software; reliable hardware; and previous versions of software installed on a separate computer (also used for CD-ROM checking)*

Introduction to the Class Project



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This is a learn-by-doing workshop, so we will get to format a proposal together

- Open the document and get ready to practice all the steps as we go through the class
- Speak up if something doesn't work

File Name: Volume I – Technical Proposal for Formatting.docx

1.0 Technical Capability (Preparation Instructions C.3 a.2; Evaluation Factors c.(2) Factor 1, Element A)
Acme is a trusted partner to CASCOC, with a core competency in OE and the capability development process. In addition to the optimal team, Acme brings a number of value-added resources to this requirement, including:

- Industry-leading expertise in energy technology Research & Development (R&D) from internal open source research and data archive;
- A data-rich methodology to drive better analytics and assessments; and
- Proven current stakeholder relationships to synchronize CASCOC's mission with the rest of the Army and DOD (currently more than 15 organizations)

TRADOC assessed the future Operational Environment of 2009-2025 to be increasingly expeditionary in nature, with increasing distributed operations presenting serious challenges to traditional logistics support. We're currently coordinating with 10th Special Forces Group to increase their capability through OE solutions for their current mission in Central Africa. Col. Andrew McCauley, CASCOC OE Office Head, reinforced this dynamic recently in an interview stating "The bottom line is that we are working to reduce our energy footprint to free these assets for other missions, extend operating distance, increase loiter time and operational endurance, and reduce risk, both personal and fiscal."

Our diverse multi-disciplinary background shapes our technical and organizational approach. We designed an optimal organizational structure that aligns personnel capabilities with the performance work statement (PWS) requirements. Figure below concentrates our technical solution around the 4 key tasks required by the CASCOC OE Office. Our flat organizational structure will leverage synergies across our entire team to collaborate as needed for all four tasks.

Figure 1.0-1. Operational Construct. Acme will support CASCOC with OE support through four primary tasks outlined in the graphic to the left. The following sections will demonstrate our technical competence and mission oriented approach to each task rooted in current relevant experience.

This construct ensures we meet our core team mission of

Using Commands in Microsoft Word



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Most professional DTPers use all three methods of working in Word

- Depending on how you like to work, Microsoft Word gives you three different ways of accomplishing the same tasks
 1. If you are comfortable with Microsoft Word, use the functions the Ribbon functions as they're laid out
 2. If you're like Sally from *When Harry Met Sally*, and you like to have things your way, build a *Quick Access Toolbar* of your most used commands
 3. If you are an efficiency nut, memorize the keystroke shortcuts for all the DTP functions in Word (listed in your class materials)



Customizing your Quick Access Toolbar

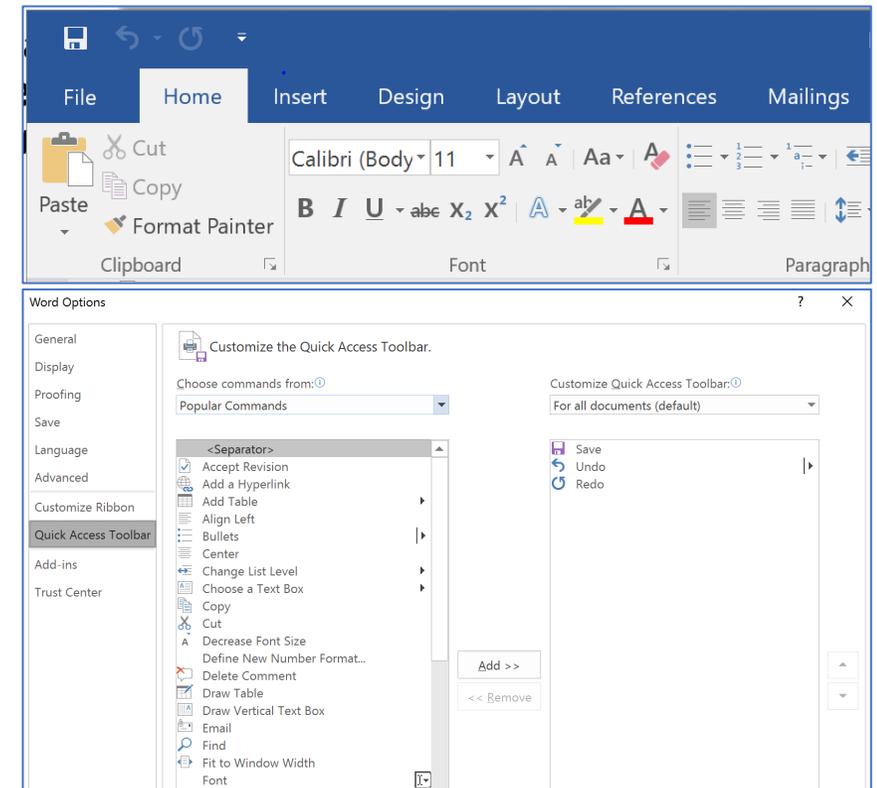


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Accelerate your work by customizing your toolbar prior to starting

- The *Quick Access Toolbar* is a special row of icons located above the Ribbon
- If you prefer, move it below the Ribbon by right-clicking on it and selecting *Show Below the Ribbon*
- To populate the Quick Access Toolbar, go to the *File* tab, select *Options*, then go to the *Customize tab* in the *Options dialogue*
- In the drop-down menu, filter commands by popularity, the tab in which they appear, and even choose commands from tabs that are normally hidden
- This is a great place to put commands used often but which take multiple steps to find



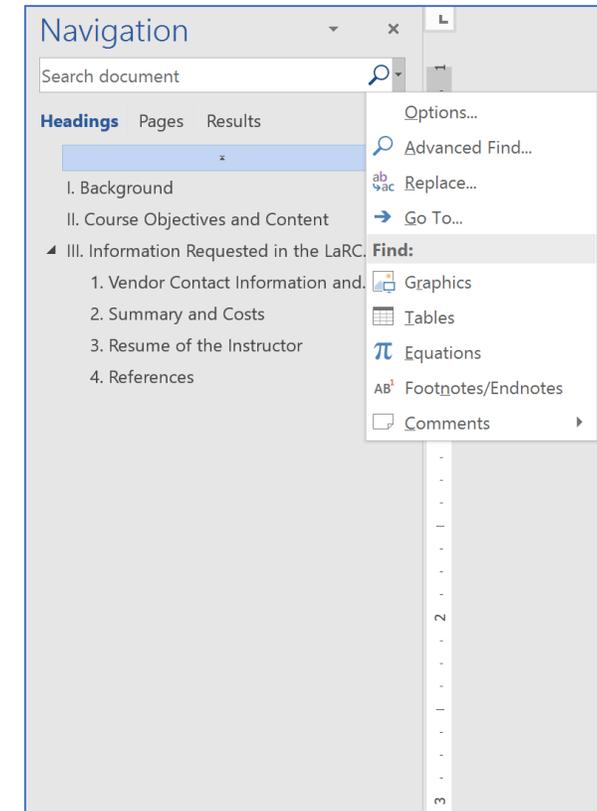
Navigating Through the Document



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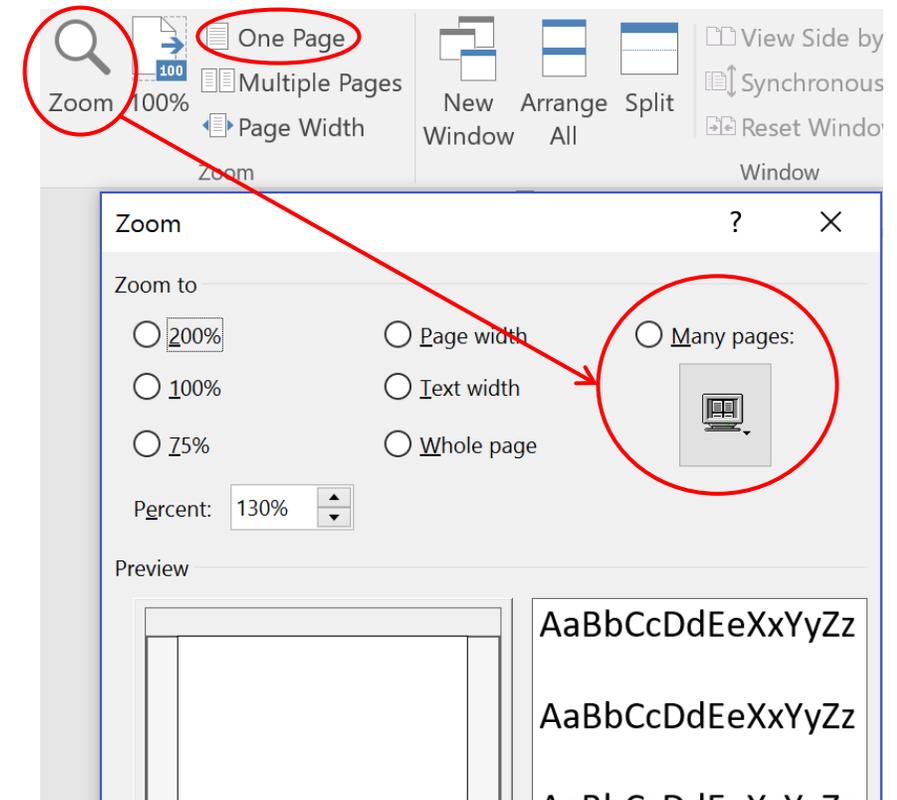
- There are two efficient ways to move quickly through the document: Keyboard shortcuts and Navigation Pane
- To navigate word by word in the document, use the shortcuts Ctrl + ← or Ctrl + →
- To navigate paragraph by paragraph, use the shortcuts Ctrl + ↓ or Ctrl + ↑
- Double-click words to highlight individual words
- Put your cursor at the beginning of a line, hold the shift key down, and click at the end of the line to select the whole line
- Ctrl + Click = Highlight Entire Sentence
- Ctrl + A = Select Entire Document or textbox text
- The *Navigation Pane* can be displayed by clicking the view tab and checking the Navigation Pane box in the show box, or press Ctrl + F
 - You can search by objects like headings, graphics, or tables, or by advanced objects like field codes
 - Browsing **by heading** or **by graphic** are effective methods of navigating the document



Additional Ways of Navigating

Zooming in and out enables you to see the entire document in thumbnails, as if on a proposal wall – and click on the desired page, zooming in again

- Zoom in and out of the document quickly to find the right locations:
 - By using scroll bar on the right-hand bottom of the page
 - By using Many pages view on the View Ribbon, Zoom button



Selecting and Pasting Text



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Text Selection and Pasting Shortcuts

Selecting a single word	Place the cursor inside the word and double-click with the left mouse button.	
Selecting a sentence	Click once inside the sentence while holding down the Ctrl button	
Selecting a paragraph at a time	Hold down the Ctrl and Shift Buttons while pressing the up or down arrow	
Selecting the entire document	Press Ctrl and A	
Using special paste options	Press Ctrl and V together to paste the text, then click Ctrl to activate the Paste Special dropdown	

More Keyboard Shortcuts



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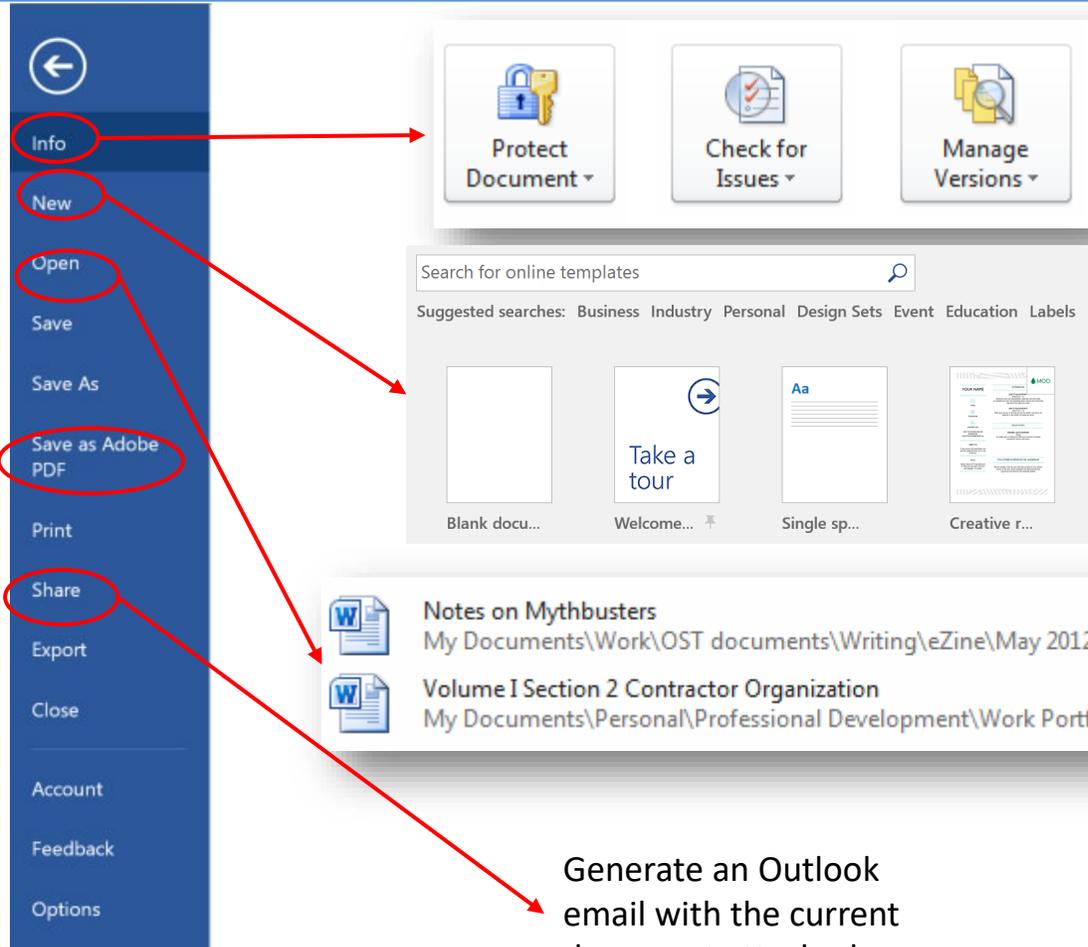


- If there's a function you use regularly and want to learn the command, hover over it in the tab menus above and if there's a keyboard shortcut for it, it will appear in the pop-up.
- Alt + Tab = See all open documents.
- Use Ctrl + Z to undo and Ctrl + Y to redo.
- Ctrl + C = Copy
- Ctrl + V = Paste
- Ctrl + S = Save
- Ctrl + P = Print
- Ctrl + Q = Remove Bulleted/Numbered List Formatting
- Ctrl + D = Font Dialog Box
- Ctrl + Shift + * = Show/Hide Paragraph Markers
- F4 = Repeat (typically used for formatting—e.g. if you just bolded text and want to bold another word or line, just click into the line or highlight it and press F4)

A Walk Through the Ribbon – File Tab



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- Make sure only certain people can edit the document
- Strip out sensitive metadata such as document authorship
- Revert to an earlier version in case of a big boo-boo

- Start a new document using the Normal template or a custom template
- Create a new template from an existing one; can find one on the Internet too

- Find documents you just worked on
- Pin documents to the top of the list

Generate an Outlook email with the current document attached

The pins have disappeared in new Word, but you can hover over top of this area and you will see them

Important Options in the Options Dialogue



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Word Options

General options for working with Word.

User Interface options

- Show Mini Toolbar on selection
- Enable Live Preview
- Update document content while dragging
- ScreenTip style: Show feature descriptions in ScreenTips

Personalize your copy of Microsoft Office

User name: David Huff
Initials: DH
 Always use these values regardless of sign in to Office.
Office Background: No Background
Office Theme: Colorful

Office intelligent services

Intelligent services bring the power of the cloud to the Office apps to help save you time and produce better results. To provide these services, Microsoft needs to be able to collect your search terms and document content.

Enable services

[About intelligent services](#) [Privacy statement](#)

Start up options

Choose the extensions you want Word to open by default: Default Programs...
 Tell me if Microsoft Word isn't the default program for viewing and editing documents.
 Open e-mail attachments and other uneditable files in reading view
 Show the Start screen when this application starts

Real-time collaboration options

When working with others, I want to automatically share my changes: Always

OK Cancel

- Show or hide spelling and grammar mistakes
- Customize AutoCorrect options

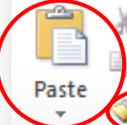
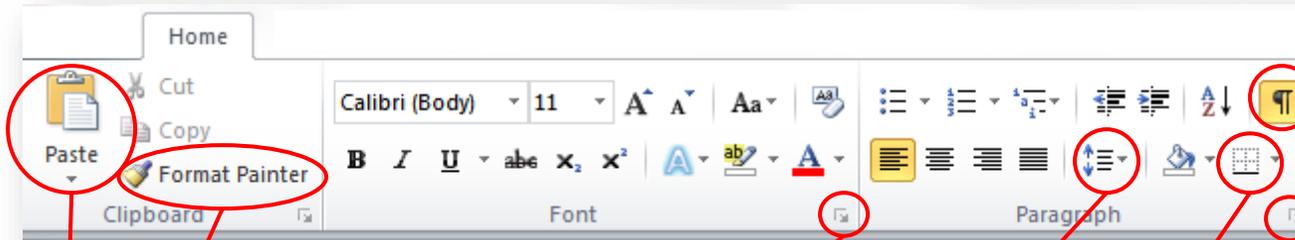
- Change AutoSave frequency
- Set AutoRecover directory
- Embed fonts

- Cut, copy, and paste options
- Create backups of local and remote work
- Detailed layout options

A Walk Through the Ribbon – Home Tab



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Paint selected formatting onto other text

Use special paste commands



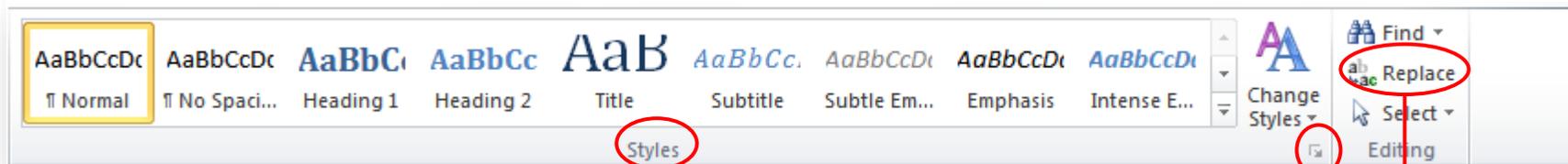
Open the Font dialog box

Adjust paragraph spacing; add spaces before or after paragraphs

Add borders to paragraphs

Open the Paragraph dialog box

Show/hide formatting marks – CRUCIAL when troubleshooting a document



Select most used styles to appear in quick style area, for faster formatting

Open a list of all styles defined in the document

Use Find and Replace feature to implement repetitive fixes faster

Using the Format Painter Tool

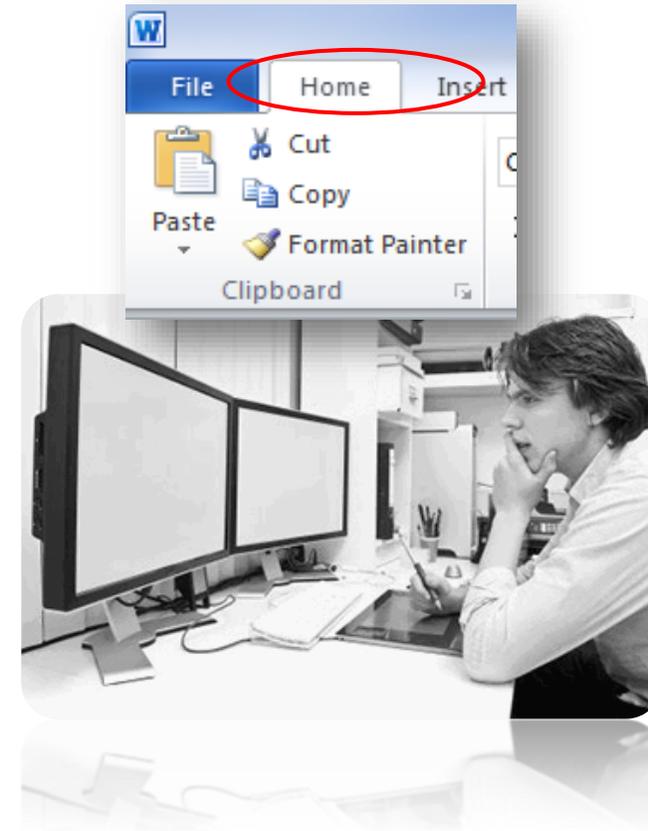


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The Format Painter tool is handy for quickly reproducing the format of a piece of text in other nearby areas of the document

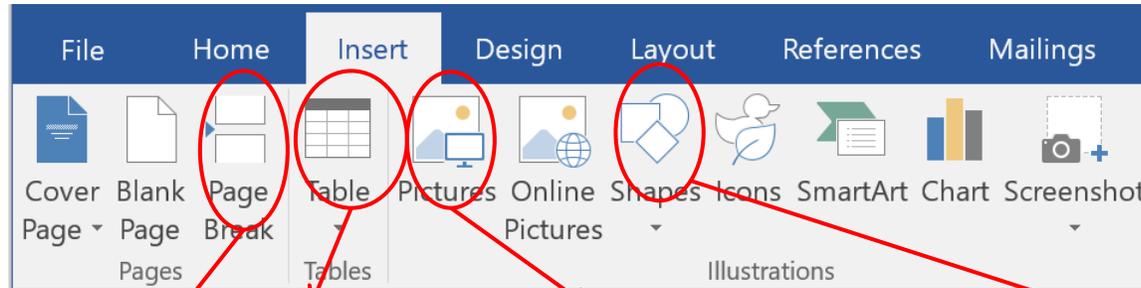
- Once you have a piece of text formatted the way you want, highlight the formatted text, including the line break marking
- Click on the paintbrush, then select the text you want to paint with those attributes
- To format multiple instances, leave Format Painter on by double-clicking the paintbrush, then click it to turn it off once you're finished
- You can “borrow” formatting from other documents and transfer it to the one you are working on



A Walk Through the Ribbon – Insert Tab



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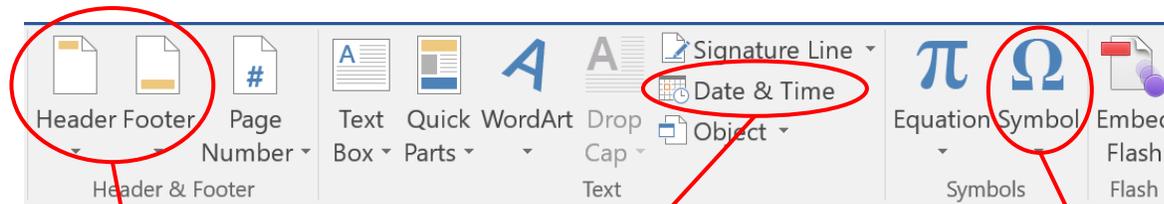


Quickly insert a page break

Insert tables up to 10x8; can also convert text to tables

Insert picture from file

Insert a focus box



Manage header and footer

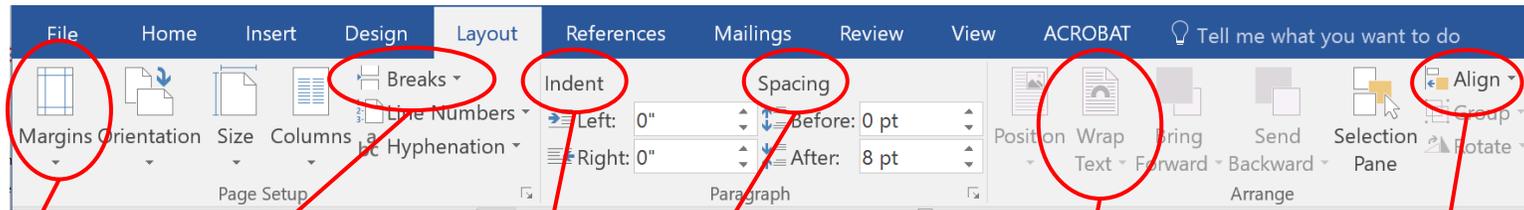
Insert date and time; using an auto-updating time stamp is not recommended

Insert special characters and symbols

A Walk Through the Ribbon – Layout & Design Tab



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Change width of page margins
Insert page and section breaks

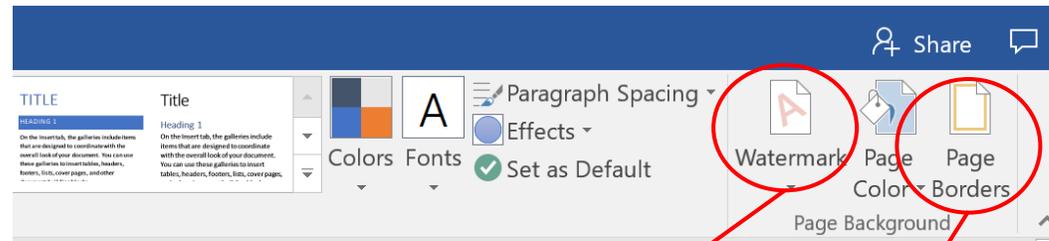
Change indentation of paragraph
Change amount of space between paragraphs

Set how text wraps around a graphic or table

Align and group objects on the page; this is especially helpful for graphics with captions



Change document theme
DESKTOP PUBLISHING FOR PROPOSAL PROFESSIONALS | 20



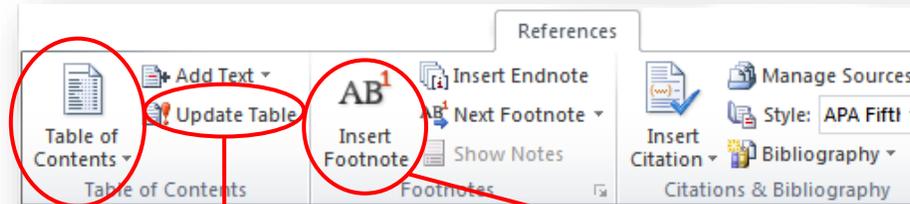
Place watermark on pages

Add page borders

A Walk Through the Ribbon – References Tab



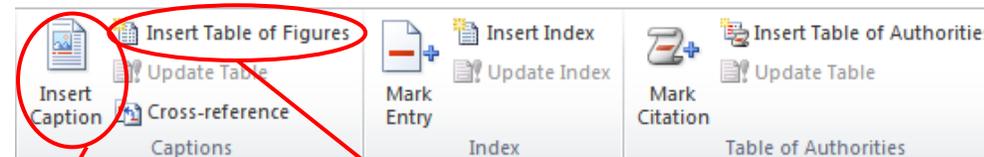
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Create a Table of Contents for the document

Refresh Table of Contents; will update both header text and page numbers unless otherwise specified

Place a footnote in the document; rarely used but if a footnote is needed, it is required to be a proper one for Section 508 compliance



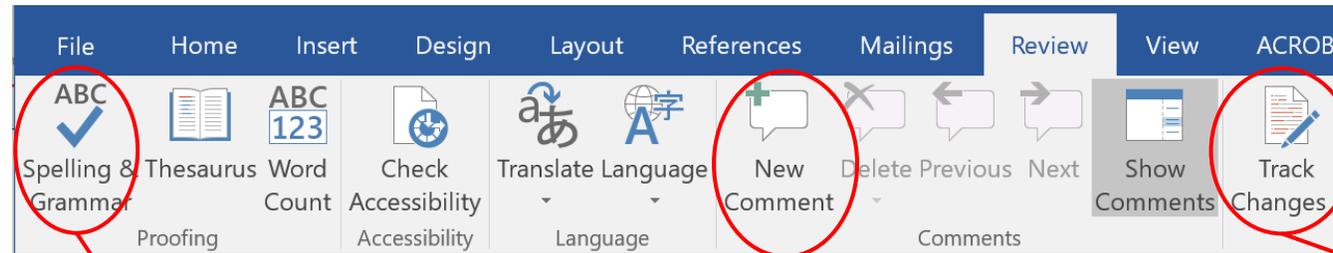
Inserts a caption beneath a graphic; very important if building a Table of Figures

Insert a Table of Figures auto-generated by captions

A Walk Through the Ribbon – Review Tab



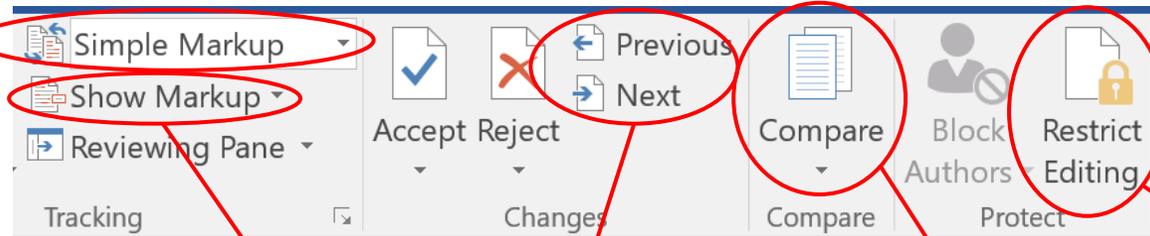
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Check spelling and grammar, run readability statistics

Insert comment; useful for querying other team members working on the document

Turn track changes on and off



View document in original or final form, with or without changes tracked

Move between tracked changes, and accept or reject them

Compare or combine the current document with another

Set permissions for who can edit the document

View different types of changes, such as insertions or deletions, or formatting changes



- Where to find compliance information in the RFP
- The elements of a proposal template
- How to choose a color palette and design a clean, attractive document
- Setting up front matter and creating sections within the file using breaks
- Setting up and using Word Styles



Creating the Template

Module 2

Understanding and Incorporating RFP Requirements



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- Read the Proposal Instructions or Section L very carefully for document design requirements
- The government will usually specify the front matter and many design elements you need to include in your proposal – typical requirements include:
 - Reference tables, such as a table of contents, a table of figures, or a table of tables
 - Information requirements for the cover page, such as solicitation number, offeror name and address, due date, and possibly signatures of senior leadership
 - A specific legal disclaimer provided by the customer which must go either on the first page, or on every page
 - Specific fonts and font sizes, page margins, paragraph spacing, single-sided or double-sided printing, and types and sizes of graphics
- It's important to separate out individual front matter elements with section breaks
 - Helps keep the document neat and organized
 - Can allow you to modify headers and footers within individual sections; for example, you don't want page numbers on your cover page, and you often might want to use Roman numerals for front matter and Arabic numerals for the body of the proposal

Elements of a Proposal Template



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A proposal template consists of the page layout, font/color choices, and header and footer design for the document

■ Considerations include:

- Is this a hard-copy or soft-copy submission?
- What do the RFP instructions say about typeface, font size, paragraph formatting, margins, graphics complexity, and information to include in the header/footer?
- Is the proposal in one- or two-column format?
- If the submission is hard-copy, does the RFP ask for single-sided or double-sided printing?
- How many levels deep does the outline go?
- How many volumes are there?
- Does the RFP call for appendices to the proposal?
- Will you need to include any 11"x17" foldouts?

Army CALL Analysis Support
RFP # W81QF4-15-R-0001
16 August 2015

2.1.2. Task 7: RFLRFP Management:
Concise, comprehensive description of approach (i.e., how we satisfy this PWS area)
Address the required deliverable

2.2. FACTOR 2 – MANAGEMENT AND STAFFING

Provide short introduction of highlights of our Management processes and procedures

2.2.1. Management Processes and Procedures
Provide description of critical management systems that ensure timely, complete, high quality performance of the PWS:

- Organization chart (IPT or hierarchical?) showing interrelationships/interactions/lines of authority
- Quality Control
- CM/DM
- Risk management
- Performance reporting
- Subcontract management
- Waiver-focused planning
- Security

2.2.2. Managerial and Supervisory Personnel Resumes
Provide short introduction to management personnel. Address RFP Sec. H, 5152.204-4001 concerns
[Resumes are excluded from the page limit]

*RESUME 1: PROGRAM MANAGER – NAME
COMPANY*

Clearance Level:	Secret, Active
Summary:	
<i>Summary of qualifications (this is where we do the sales job)</i>	
Education:	
Applicable Criteria:	How Candidate Meets or Exceeds RFP Requirements:

Volume 2 - Mission Capability and Past Performance Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal page 8

Process for Creating the Document Template



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Setting up document template takes an extra 30 minutes upfront but saves hours later, when you need time the most

1. Create a blank document

- Go to the *File* tab, click *New*, and select *My Templates*
- Click on *Blank Document* and click *OK*
- Select the *Template* radio button for a multi-volume proposal



2. Incorporate RFP requirements

- Set page margins at the minimum allowed by the RFP or 1"
- Adjust *Normal* style, including typeface, font size, line spacing, and paragraph spacing



3. Lay out headers and footers

- Include all info required in the RFP
- Include legal disclaimer in the footer
- Add page numbers to footer
- Group information together logically
- Add top and bottom separator bars



4. Add visual appeal

- Set up color theme
- Set caption and heading styles
- Add graphical embellishments to the header and footer
- Look for ways to increase white (negative) space

Consider the Design



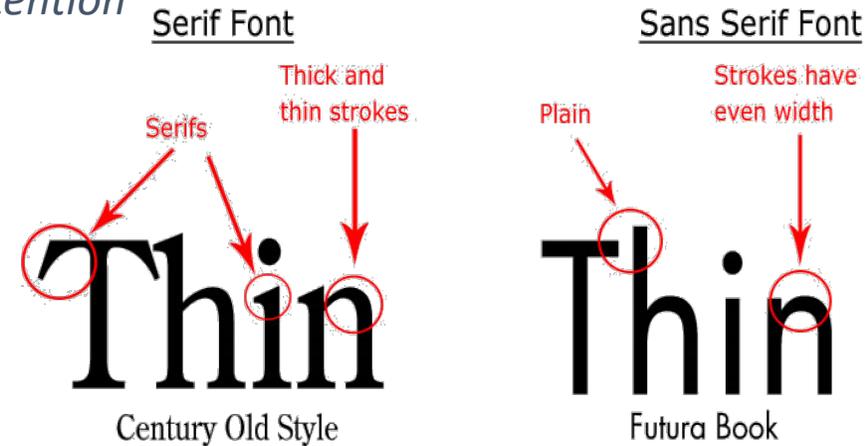
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To help evaluators not skip the important sections, you must visually structure the document so that the main ideas catch the readers' attention

Typography:

- Serif faces may be easier to read in continuous text than sans serif faces (Times New Roman)
- Sans serif fonts are best for graphics and headings (Arial, Arial Narrow for space purposes)
- All caps reduce reading speed by 13-20%
- Continuous italics type significantly reduces reading speed
- Underlining looks dated
- Readers pay attention to contrast among typographic elements such as bold, light, extra bold



More Design Considerations



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Comprehension increase is important in evaluators' ability to appreciate positive aspects of your proposal

- 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
- 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 – if you want the look of all-caps, use small-caps instead

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

Visual Hierarchy



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Ordering of images, headers, and text helps evaluators quickly understand relative importance of document's elements and helps skim the document effectively

- Heading 1 style should be larger, brighter, and more prominent than Heading 2, 3, and so on
- Indenting should be clear on bullets and sub-bullets
- The most important items on the page should be larger than the least important
- Important win themes, key words, or discriminators should stand out in focus boxes or pull-quotes

Team Enduring Support for an Enduring Capability In response to Solicitation W91CRB-08-R-0092

	Principal Consultant I	Analyst II	Senior Analyst I	Senior Analyst II	Principal Analyst	Budget Analyst
Embedded Quality Control and Assurance						
Integration and Operations Branch						
Customer Operations MAST						
Budget and Administration MAST						
Envelopes and Technology Branch						
Command MAST						
Materials and Mechanical Engineering MAST						
Sensors and Signals MAST						
RFIS MAST						
Attack the Enemy Branch						
Command MAST						
Protect and Present MAST						
Defend LAG MAST						
Special Action Programs MAST						
Defeat the Enemy Branch						
Command MAST						
Detect (Ground) MAST						
Militant MAST						
Nonlethal MAST						
CRBW MAST						

Exhibit 2.1-5. Quality Control Personnel in MAS Ts. JEDDO receives higher-quality support because each of our MAS Ts has at least one designated member to facilitate process reviews.

Our oral presentation will discuss the remaining elements of our approach. The following section presents our plan for transition with minimal mission impact and without loss of institutional knowledge.

2.1 Approach to Transition from Incumbent Contractors [L.1.b.3]

Our approach to transition is low-risk because we have all elements in place as part of our comprehensive plan, and we are ready to start implementation on Day 1.

To implement a seamless transition from the incumbent contractor to our Team, with maximum continuity and minimal impact to operations, we developed a comprehensive transition plan. Our plan is based on a tested, proven, and structured transition model based on dozens of successful transitions by Team G55, as well as our understanding of the TRID structure, requirements, and operational tempo (OPTEMPO). Our plan helps to mitigate the multiple risks inherent in a transition process and consists of five key components:

1. A dedicated Transition Management Team (TMT) focused on the identification and selection of qualified incumbent personnel and the transfer of mission responsibilities.
2. Focus on the execution of transition activities and the establishment of MAS Ts in line with the TRID structure.
3. A detailed transition plan that allows the flexibility to respond to real-time requirements through continuous and structured dialogue with the Contracting Officer's Representative (COR), TRID leadership, and incumbents.
4. Regular in-process reviews with our PM, our Director of Operations, Darrell Childs; and our President, Bobby Elachovell.
5. Maximum use of our Microsoft SharePoint-based Knowledge Management Portal (KMP) to facilitate information capture, exchange, and sharing and to provide progress reports.

Our KMP enables and enhances all aspects of communications and collaboration, as shown in Exhibit 2.1.1.

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In response to Solicitation W91CRB-08-R-0092 Team Enduring Support for an Enduring Capability

Exhibit 2.1-1. Team G55 KMP. Team G55 will use our Web portal to enable TRID leadership monitoring, facilitate collaboration, structure workflow, and speed administration processing and paperwork.

The KMP is the single point of entry to four critical areas:

1. Monitoring of all transition activities throughout the process
2. Collaboration among the COR, TRID leadership, the TMT, and other stakeholders
3. Workflow visibility for transition and post-transition monitoring
4. Virtual visibility to rapidly in-process personnel, track the status, and report on personnel transition.

2.1.1 The Transition Management Team

Exhibit 2.1-2 presents the composition and responsibilities of personnel involved during the task order transition period, with our APM Scott Fromm leading the TMT. It shows the transition activities group that includes the infrastructure staff that coordinates activities across Team G55. Mr. Fromm executes daily activities including finalizing questionnaires, checklists, and templates. He also meets with TRID leadership and incumbents to collect and understand the current processes and procedures, as well as to develop any additional requirements from TRID leadership. We will use the metrics shown in Exhibit 2.1-3 to track our progress.

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Creating a Visually Appealing Document



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The more white space you can afford to include in your document, the more readable and appealing it will be

- Fully-justified text is harder to read than left-justified, so try to avoid full justification if you can
- Use Word-recommended 1.15 spacing, at a minimum, within paragraphs, or 1.50 if you can afford it (old Word 2003 spacing is 1)
- Add at least 6 pt spacing after each paragraph, to break up walls of text; using 12 pt spacing for 12 pt font, 10 pt spacing for 10 pt font, is ideal
- Leave a space of at least the same point size as the size of the heading before it (12 pt for 12 pt, 14 pt for 14 pt), but keep it close to the following paragraph, so that the heading and text are grouped together attractively

Make sure your heading styles use a **hanging indent** instead of allowing second line to begin at the margin

Set bulleted and numbered lists apart from the rest of the text using indentation

- Indent bullets by at least ¼" from body text on both sides
- Use hanging indents for multi-line bulleted or numbered text

Layout Types

Every layout type has its advantages and disadvantages, and impacts readability and impression from your proposal



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1 column

SEVIS Software O&M Support Services
RFQ Number HCETC-15-Q-0000

QUALITY
Ensuring quality is a Team effort which is documented more fully in the Management section. Our PM incorporates gate changes, review, and lead times into the Project Release Schedule which is baselined, reviewed, and updated weekly. Our QA Lead ensures all SLM artifacts are completed and approved using ICE mandated applications, tools, and templates with final versioned results pushed to ELMS; all SLM gate decisions are satisfactorily completed; code is thoroughly tested. Code configuration management is managed by our Enhancement Team Lead.

TEAM EXPERIENCE
The following demonstrates our Team's successful execution of the SCR process:
ICE SCR Experience: Company currently provides O&M services to ICE's EABM and WebIDENT system. As recorded in EABM releases (9.38, 9.39, and 9.40) and WebIDENT releases (1.27 and 1.28), Company successfully completed eleven (11) SCRs between the two systems. We continue to deliver timely code changes that are fully compliant with all ICE SLM and Agile procedures. This support included emergency release for an SCR to modify the Form 247 per Director Morton's commitment which was completed in 3 days.
CBP SCR Experience: B&A supports CBP's TECS, an umbrella program with over 30 systems. It is a large-scale (10 M+ transactions per day), performance driven (1 to 3 seconds response time) system. In CY2012, our team successfully delivered over 500 maintenance SCRs, fully compliant with all DHS governance and specific CBP methodologies.

1.2.2 Statistical Reporting
UNDERSTANDING
SEVIS's extensive user community requires ad-hoc reports which include: raw data on exchange visitors; lists of exchange visitors that applied for change status during a certain period; and lists of exchange visitors currently participating in a particular state in addition to the routine reports run as part of normal SEVIS operations among others. SEVIS includes a Java-Based reporting tool to respond to non-routine (ad-hoc) reporting requests.
Maintenance support is required on the tool and its underlying reporting data repository. It is also required in response to routine and non-routine ad-hoc report requests.
COMPANY TEAM METHODS
Maintenance for reporting tools and underlying data store is discussed in the following OBIEE section.
Report requests generated via Remedy transfer from the SEVIS Help Desk or per request would be reviewed with the Government as part of approved SCR procedure. Approved ad-hoc reports are incorporated as part of our Scrum daily stand-up meetings and Sprint Review. This allows full team visibility into workload, provides opportunity for COR to prioritize requests; and establishes target completion date for reporting back to customer.
Upon receipt of an approved SCR for ad-hoc report, we follow a model-based reporting process to convert a user request to a complete report. This method follows an ITIL process using Agile Scrum to ensure repeatable, quick, and accurate reporting:
#1 - Capture ad-hoc report request in Remedy
#2 - Review Knowledgebase for same/similar ad-hoc request; if found validate requirements and execute query to generate report
#3 - New request, validate requirements
#4 - Use the model based ad-hoc query and reporting tool to develop the statistical report

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2 columns

SEVIS Software O&M Support Services
RFQ Number HCETC-15-Q-0000

1.2.2 Statistical Reporting
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#2 - Review Knowledgebase for same/similar ad-hoc request; if found validate requirements and execute query to generate report
#3 - New request, validate requirements
#4 - Use the model based ad-hoc query and reporting tool to develop the statistical report

#5 - Verify and validate the user request by demonstrating the statistical report
#6 - Develop reports in Java-based tool
#7 - Store ad-hoc query and reporting tool report, update Knowledge base for re-use.

QUALITY
Execution of existing approved ITIL processes for Service Desk requests (see Section 2.3 Maintenance Services on Page 10) are monitored for compliance by our PM (also functions as Operations Support Lead). Our use of a Knowledgebase (tool approved/provided by ICE, as part of SEVPAMS) ensures that same/similar requests are handled consistently, quickly, and without rework.
Approved routine requests are executed using approved ITIL processes for reporting as part of the request fulfillment process; data quality is validated by System QA prior to delivery to requesting customer; upon customer acceptance, ticket is closed.
COMPANY TEAM EXPERIENCE
CBP Java Based Statistical Reporting Experience: Our team developed a Java based reporting system for the Western Hemisphere Travel Initiative. This reporting vehicle provides statistical reporting to all levels of CBP management from the Officers at the Ports of Entry to the Executive management in the Commissioner's Office.
NIST Ad-Hoc Statistical Reporting Experience: Our team developed a custom web-based reporting tool using Jasper, iText, Oracle, Java, and Flex. The ad-hoc reporting tool provided robust search capabilities with statistical data about NIST Associates (country of citizenship, funding, employer, research area, education, and duration). The tool provides dynamic filters, sorting, and multiple downloadable formats.

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¾ columns

SEVIS Software O&M Support Services
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Officer (ISSO), Information Technology Project Manager (ITPM), Architecture/Configuration Management (CM), Implementation Manager, and Service Desk Support. All stakeholders must be engaged at the stated/defined points in the workflow to ensure timely and compliance service delivery.
The Company Team's experience performing DHS O&M support services offers us the in-depth expertise to perform immediately on SEVIS without any spin-up time "learning the DHS and ICE ropes".

1.2.1 System Change Requests (SCRs)
UNDERSTANDING
Following a structured change management process, ICE uses SCRs to identify, track, and approve improvements to SEVIS. Support only commences upon receipt of Government approval of the SCR. The PWS identified the anticipated number and estimated level of effort based on classification (e.g., minor, moderate, major, and extra-large).
COMPANY TEAM METHODS
Our Team tracks all time spent on the approved SCRs and O&M compared with Enhancement (e.g., confirm 25% O&M vs. 75% enhancement historical data). Analysis of actual against anticipated data is completed by our PM and provided via monthly progress reports.
The Company Team adheres to the ICE SLM and Agile implementation methodology. We work with the SEVIS Product Owner during sprint planning meetings to obtain approval to move SCRs to the sprint backlog, create the project release schedule will all key milestones, dependencies, resources, and SLM gate decisions to ensure that the package is delivered per ICE's required deployment schedule.
We align our release request (includes list of approved SCRs) to the System Engineering Branch's Sprint Cycle.
Our System Quality Assurance Lead ensures the following key processes are completed:
#1 - Receive Approved SCR
#2 - Send a Notice of Intent to Release (NIR)
#3 - Provide Project Schedule
#4 - Perform Development Activities including Functional Quality Test (FQT)
#5 - Submit Development Test Analysis Report (DTAR), Development Test Plan (DTP), and Version Description Document (VDD) in ELMS and code change to CM Tools

QUALITY
Ensuring quality is a Team effort which is documented more fully in the Management section. Our PM incorporates gate changes, review, and lead times into the Project Release Schedule which is baselined, reviewed, and updated weekly. Our QA Lead ensures all SLM artifacts are completed and approved using ICE mandated applications, tools, and templates with final versioned results pushed to ELMS; all SLM gate decisions are satisfactorily completed; code is thoroughly tested. Code configuration management is managed by our Enhancement Team Lead.

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Most Readable Formats



OST GLOBAL SOLUTIONS



Research results by Christine Menna, University of Pittsburgh at Jonestown, 2011

- Readers are most willing to read the $\frac{3}{4}$ page format with pictures and focus boxes in the margins
- Double-column text and single-column are no different in reader willingness, readability, and comprehension, as long as there are pictures
- Color + Graphics = Readability
- All important information should be presented at least 3 times for greater comprehension



Creating a Color Palette From an Existing Graphic

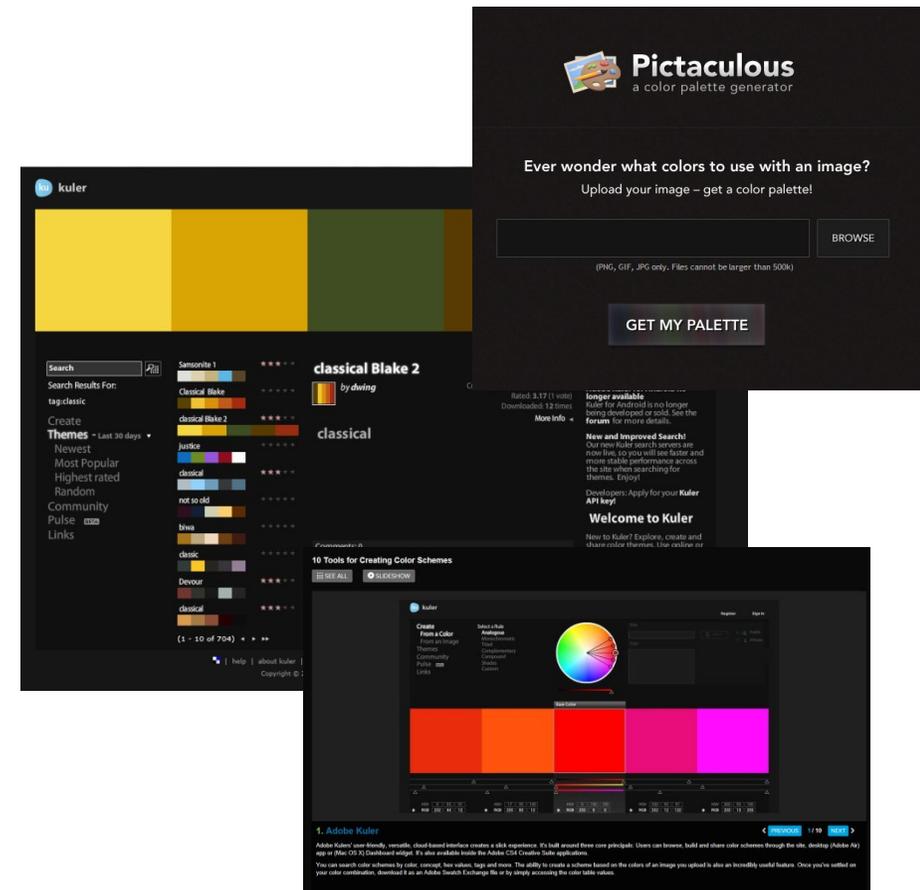


OST GLOBAL SOLUTIONS



Color has a deep emotional impact on people

- Choose a source graphic – your logo or your customer’s logo, for example
 - Note:** Check with your graphic artist to make sure there is not already an existing palette
- Go to <http://www.pictaculous.com>
- Upload a picture from your hard drive and click on “Get My Palette”
- Copy down the six-digit codes under each color swatch – these are the HTML hexadecimal codes
- Go to <http://kuler.adobe.com>, mouse over Color Rule, and select Custom
- Enter the six-digit codes from Pictaculous into the Hex fields on the Kuler page
- Copy the RGB values for each color – these are the numbers you will use to set your palette in Word



Setting Up Your Color Palette as a Word Theme

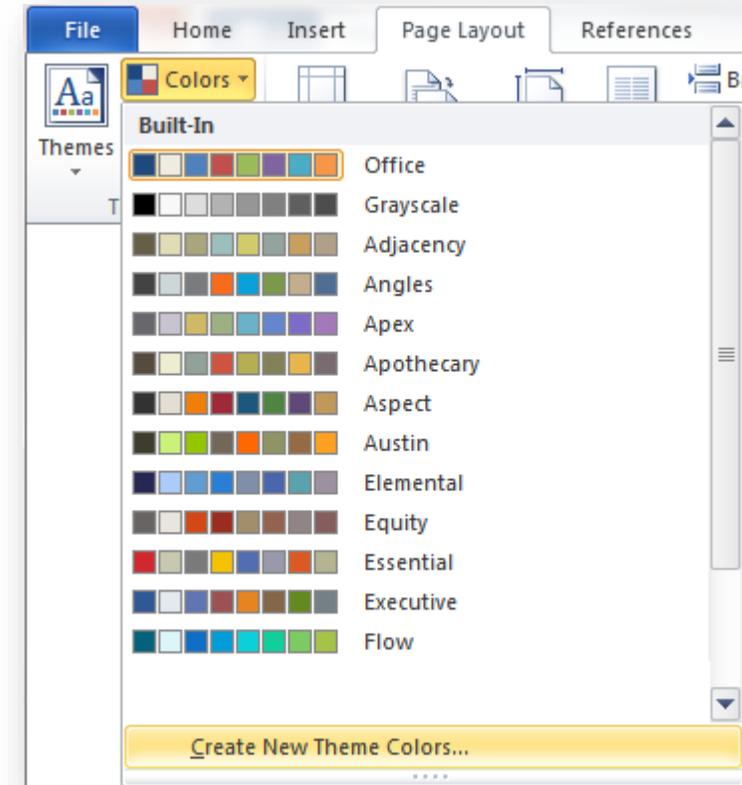


OST GLOBAL SOLUTIONS



So you have a nice five-color palette to work with – now what?

- Remember that lighter and cooler colors are easier on the eyes than stronger or brighter colors – so go easy with the neon orange and use lots of muted blue or gray
- To set up your palette in Word, go to the *Page Layout OR Design* tab and select the *Colors* drop-down menu, then select *Create New Theme Colors... OR Customize Colors...*
- Next to each color category, use the drop-down option to select *Use Custom Color*, then enter in your RGB values
- Check the preview of your theme to make sure it looks nice
- Don't forget to give your theme an informative name



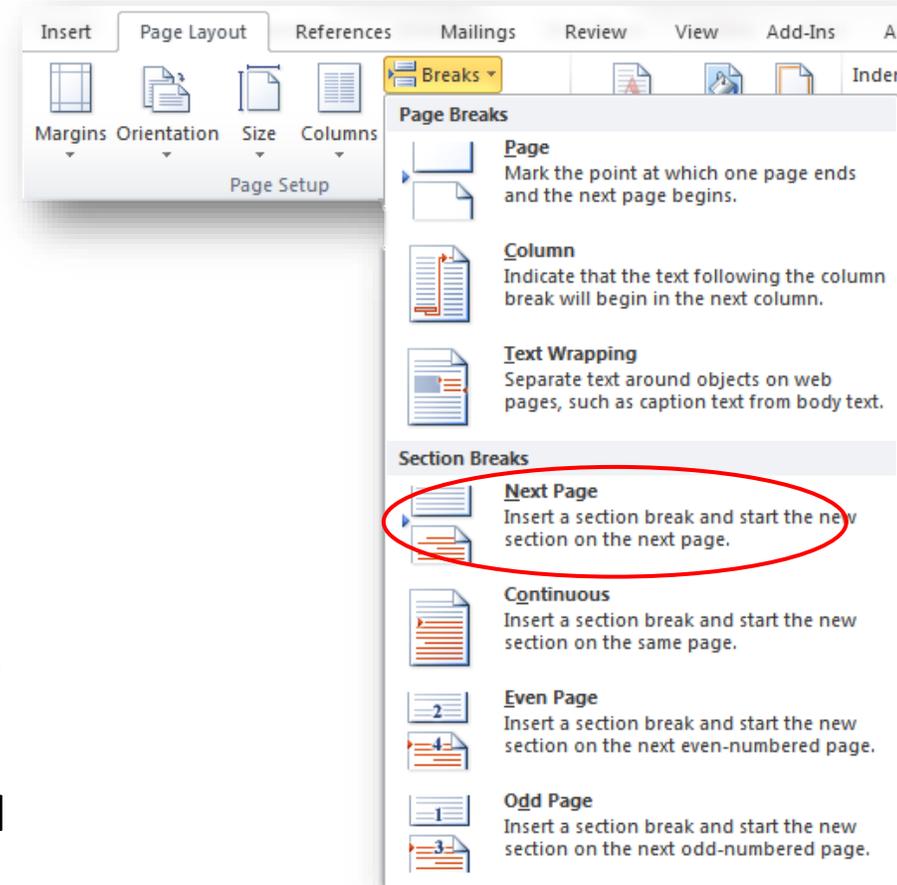
Creating Compliant Front Matter



OST GLOBAL SOLUTIONS



- Check how many separate items of front matter the RFP calls for
 - Cover page? ToC? Table of figures? Glossary? Acronyms?
 - **Note:** Reference tables may be combined into a single section
- Go to the *Page Layout OR Layout* ribbon, and under *Page Setup*, click on the Breaks drop-down menu
- Insert as many *Next Page* section breaks as there are pieces of front matter required
- When adding in front matter, make sure you enter text and objects above and to the left of the section break
- Make sure any legal language the RFP calls for is added to the cover page and body footer, as needed



Making Placeholders for Reference Tables

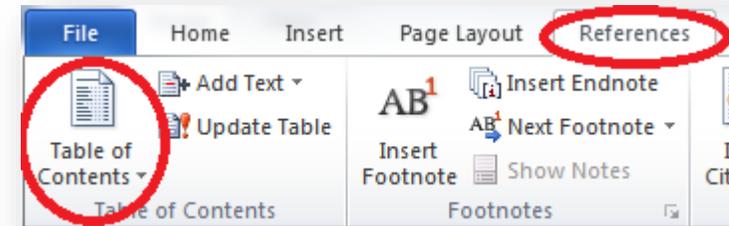


OST GLOBAL SOLUTIONS



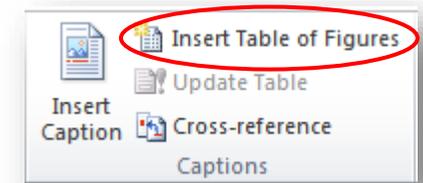
- First, make your table of contents:

- Place your cursor above or to the left of the section break in the section immediately after the cover page
- On the References tab, under Table of Contents, select the Table of Contents drop down menu and then choose Automatic Table 1
- Depending on how complex the structure of your proposal is, you may want to go to the Add Text drop-down next to the Table of Contents menu, and de-select Heading 3 – you only need to include it if your headers go four or more levels deep



- Add a Table of Figures and/or Table of Tables if needed:

- Either in the same section as the Table of Contents, or in the section following
- To get a Table of Figures or Table of Tables to generate correctly, you must use the Insert Caption command to create all captions in the document



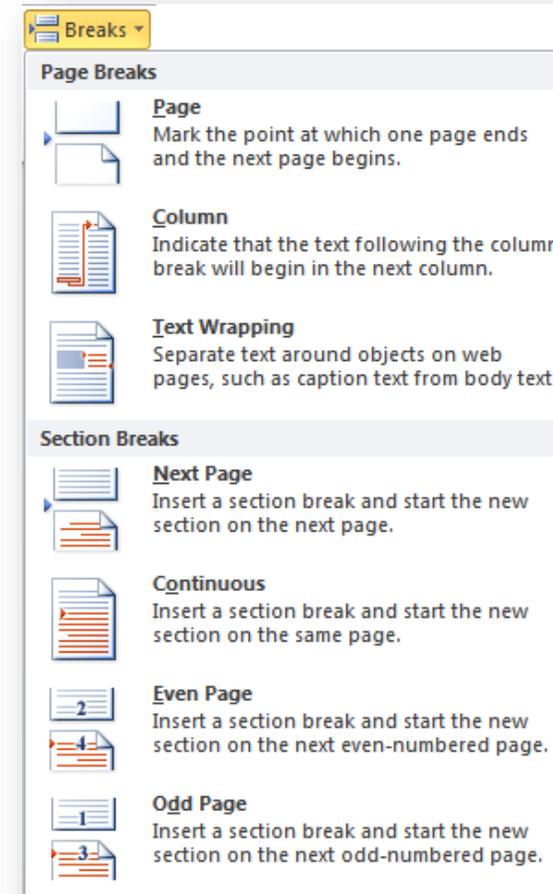
Formatting the Document Using Breaks



OST GLOBAL SOLUTIONS



- Word has 3 main types of document breaks:
 - Page breaks are most useful for a piece of text that is not autoformatting nicely (not good for much else, so use sparingly)
 - Column breaks save space on bulleted lists, and smooth over awkward automatic text breaking in a two-column-formatted proposal
 - Section breaks are a desktop publisher's bread and butter—they let you:
 - Change header and footer formatting from page to page
 - Insert large and complex graphics without disturbing the flow of text
 - Format parts of the same page differently
 - Use Roman numerals for front matter and special section page numbering for appendices, and so on



Creating Polished Headers and Footers



OST GLOBAL SOLUTIONS

- One of the marks of an excellent DTPer is knowing how to:
 - Create mirrored headers and footers for proper double-sided printing
 - Vary page numbering across document sections
 - Format header and footer information in an aesthetically pleasing way
- To access the Header and Footer toolbar, double-click in the top or bottom margin of the page. The ribbon below will pop up:

Use this when you only need a cover page and no front matter

If you have narrow margins, use these options to save space

Company logos are often a good addition

NEVER use clip art

NEVER use pre-generated headers and footers, or automatic parts other than page numbers

Automated page numbers are essential to good desktop publishing

Link to Previous is a key function – it allows you to change the content of headers and footers between sections of the document

If you are required to print double-sided, using different odd and even header and footer designs will create a sleek look in production

Annotations on the screenshot include:

- Red 'X' marks over the 'Header & Footer' and 'Picture' buttons.
- Red circles around the 'Page Number' button, 'Link to Previous' button, and the 'Design' ribbon.
- Red arrows pointing from text annotations to specific ribbon elements.

Taking Advantage of Word Styles to Save Time and Make a More Robust Document



OST GLOBAL SOLUTIONS



- Styles in Word are a DTPer's key to enforcing consistency
- They save time on generating reference tables, and let you quickly implement changes across the entire document
- You can apply a style to a paragraph by placing the cursor in the text, and either selecting the style from the Quick Styles on the Home Ribbon, or by opening up the full list of styles and clicking on the name of the style
- Always apply formatting to text in a document as part of a defined style

The *Normal* style is the basic text style that Word uses in the document

It is the foundation for all or most of the other styles you define

- When removing formatting from a section of text, it reverts to the *Normal* style
- Be careful when changing the *Normal* style, as you may cause unintended effects such as text spreading out over the page limit, messing up tabulation, and so on

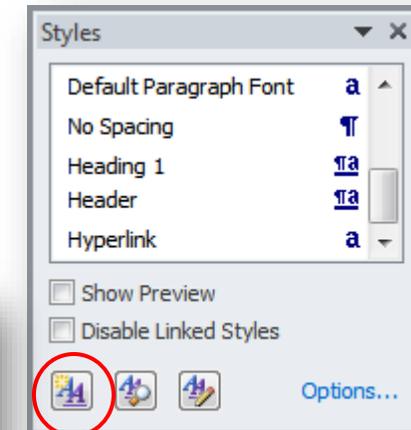
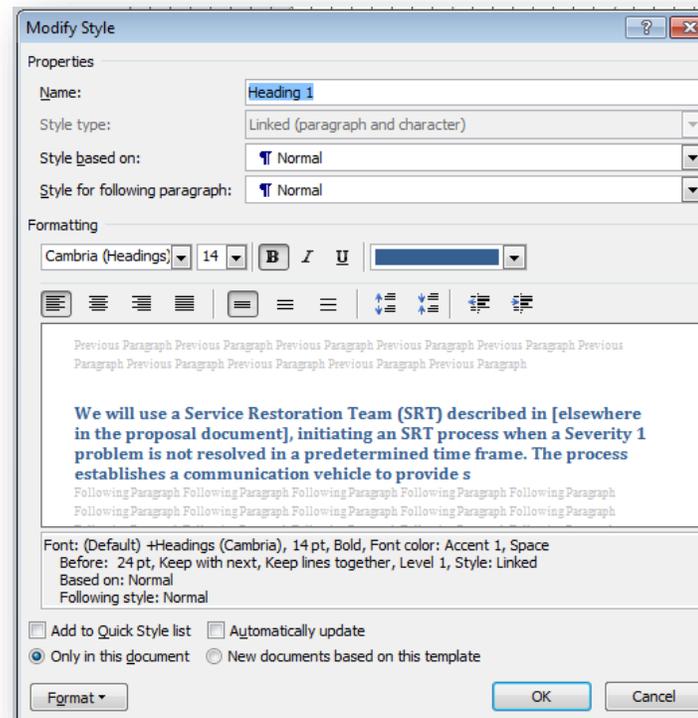
Creating and Editing Styles in Word



OST GLOBAL SOLUTIONS



- To create a new style in Word, create a section of text with the properties you want, then highlight it and right-click
- In the drop-down menu, select *Save Selection as a New Quick Style...*
- When you access the dialogue, you will have additional options to modify the new style
- Alternatively, you can open up the *Styles* pop-out menu and click on the *New Style* button
- To edit an existing style, you can right-click on it in the *Quick Style Toolbar* or the *Style* menu and select *Modify*



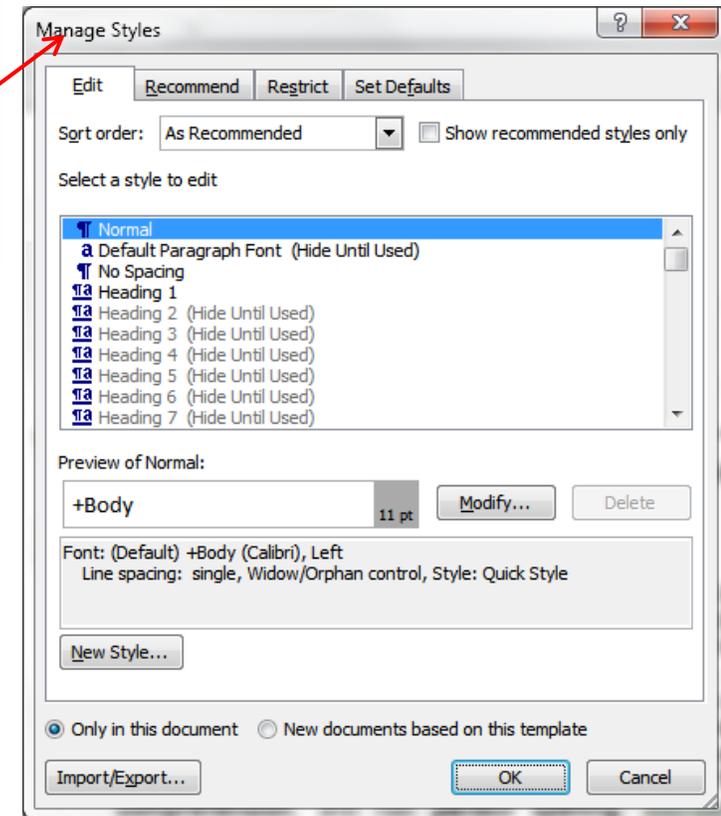
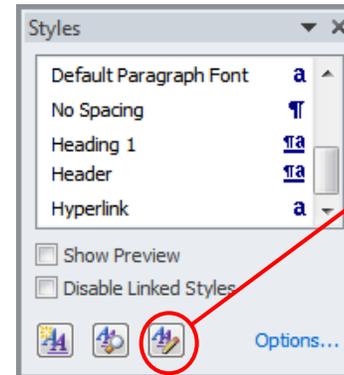
Managing and Importing Styles, and Using Quick Styles



OST GLOBAL SOLUTIONS



- Open the Styles menu, and click on the rightmost bottom button to open the *Manage Styles* window
- From here, import styles from a pre-existing template, clean up the list of styles, and select which styles appear in *Quick Styles*
- Display only the *Normal* style, the number of headings corresponding to the document outline, and a bulleted list style in *Quick Styles* for the authors and editors
- Remove anything you will never use
 - This is critical when your company reuses the same templates repeatedly, as different styles get built up like dust bunnies under the sofa
 - Having too many styles defined can lead to strange errors and mishaps



Cleaning Up Existing Style Sheets for Fast and Reliable Formatting

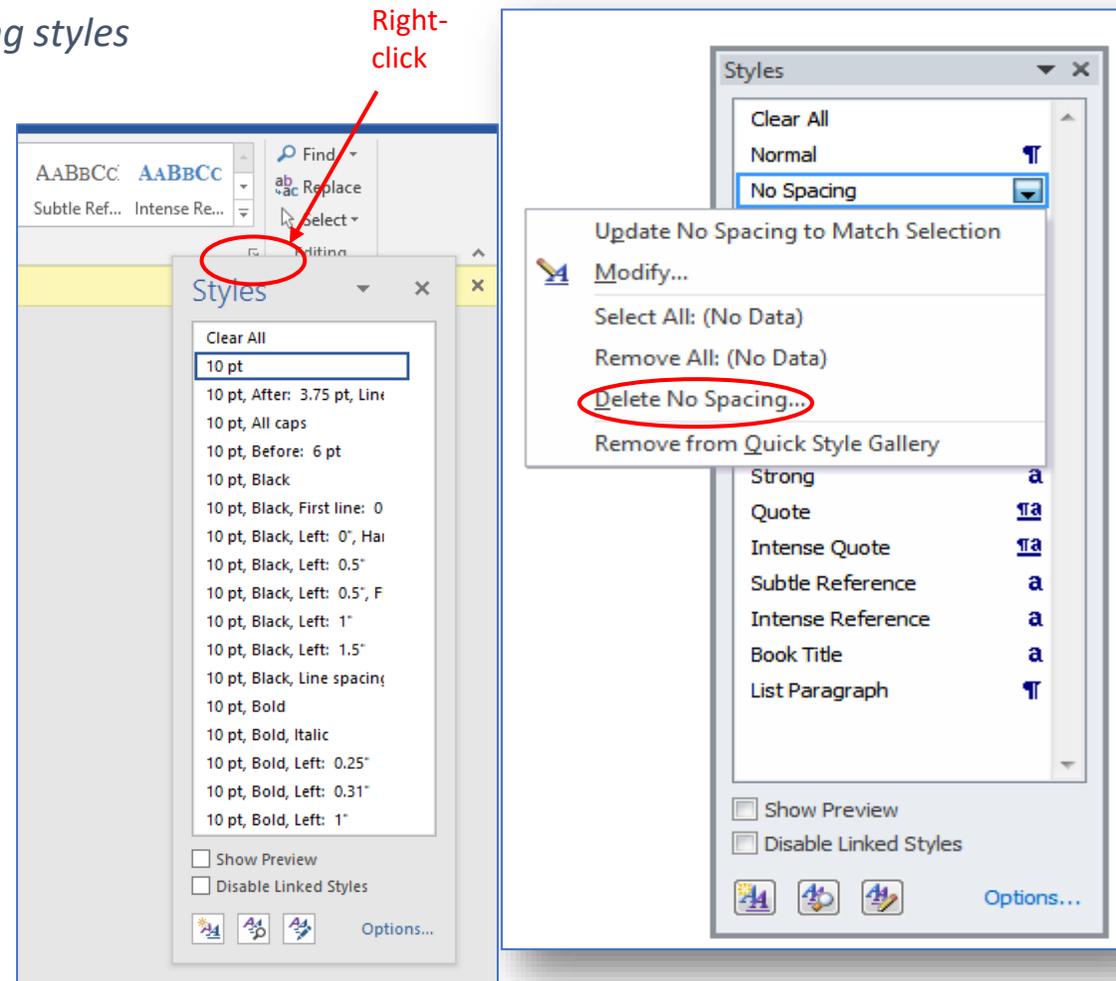


OST GLOBAL SOLUTIONS



If you have been provided a template, 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
 - Under File → Options → Advanced → Cut, copy, and paste → Change the first four options to *Keep Text Only*
- To delete an unused style, open the *Styles* window, open the drop-down menu for the style, and select *Delete style*



Defining Table Styles



OST GLOBAL SOLUTIONS

Create New Style from Formatting

Properties

Name: Table with Banded Rows 1

Style type: Table

Style based on: Table Grid

Formatting

Apply formatting to: Odd banded rows

Font: Automatic

1/2 pt

	Jan	Feb	Mar	Total
East	7	7	5	19
West	6	4	7	17
South	8	7	9	24
Total	21	18	21	60

Top: (No border), Bottom: (No border)
 Pattern: Clear (Text 2), Priority: 100
 Based on: Table Grid

Only in this document New documents based on this template

Format OK Cancel

Give the table style a descriptive name

- Insert a 1 cell x 1 column table and place your cursor inside it to access the *Table Design* Ribbon
- Expand the quick table styles drop-down, and select *New Table Style...*

Apply formatting to different rows and columns

Change text alignment

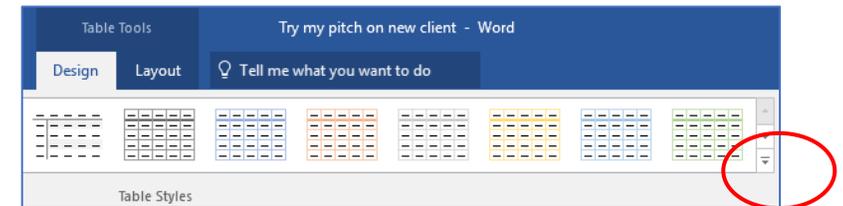
Cell fill color

Choose which borders to apply

Change weight of borders

Choose border style

Advanced formatting options





- Importing raw text, tables, and graphics
- Implementing your document design
- How to handle graphics insertion
- Updating and debugging reference tables



Module 3

DESKTOP PUBLISHING THE PROPOSAL

Importing Content into a Clean Document

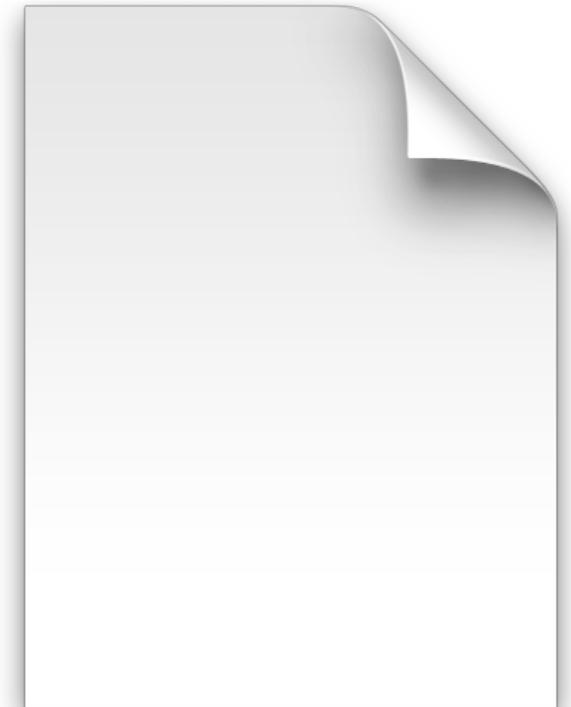


OST GLOBAL SOLUTIONS



Pasting from different programs requires different techniques to account for the quirks of moving data between programs

- Use the keyboard shortcut for pasting text only when importing large blocks of text from one document to another – Ctrl + V, Ctrl, T
 - Use the same method when copying from a PDF – just be aware that text imported from PDFs has hard returns at the end of every line
- When pasting from Excel, highlight the range of cells you want to bring in, then press Ctrl + V to insert the content as an unformatted table
- When pasting from Powerpoint, make sure all your graphical elements are highlighted and grouped together
 - Paste content as a picture – Ctrl + V, Ctrl, U – and place it inside a 1x1 table to make alignment easier and improve stability



Implementing the Document Design



OST GLOBAL SOLUTIONS



- Go through the document and apply your template styles as needed
 - You have already set the *Normal* style to match the government's specifications
 - Make sure you format headers at the appropriate level, as doing so is crucial for getting the Table of Contents to generate correctly
 - If you see any paragraphs that break across pages with two or fewer lines of text on the previous or next page, open the *Paragraph* dialogue from the *Home* Ribbon, go to the *Line and Page Breaks* tab, and uncheck *Widow/Orphan control*
 - If a header appears on the last line of a page, highlight them along with the first line of the body paragraph, and in the *Line and Page Breaks* tab check *Keep with Next*
- Apply table styles accordingly, adding in captions if the RFP calls for a table of tables

Make sure your bulleted lists are formatted correctly, and that if you have designed a last bullet style that it is applied to every final bullet in the document

To save space, you can place continuous section breaks before and after a bulleted list, place your cursor inside the list, then click on the *Columns* drop-down under the *Page Layout* tab and select *Two*

Inserting Graphics Seamlessly Into the Document



OST GLOBAL SOLUTIONS



- Before you insert a graphic, check to make sure that it is sized properly for the space allotted for it
 - One of the biggest no-nos for a desktop publisher is manually resizing a graphic once it's been pasted into Word – the proposal may be thrown out due to non-compliance on minimum font size in graphics
 - If the graphic artist has rendered a picture that is way too big or small, ask them to resize it
- Insert each graphic into a 1x1 table
 - Word handles placement on the page and text wrapping better with tables than with graphics
 - Tables eliminate problems with lines of text spreading out, or having the graphic jump all over the page when you move it
- Make sure that the graphic is placed inside the page margin

Use the auto-caption feature on every graphic, either by right-clicking and selecting Insert Caption from the drop-down menu, or by clicking the Insert Caption button on the References Ribbon

If you move graphics around in the document, highlight the captions and press F9 to ensure the numbering stays in the correct order

Adding and Formatting Focus Boxes



OST GLOBAL SOLUTIONS



Focus boxes are one of the places for showcasing win themes and any information you want to highlight; they also break up the monotony of text

- Put together a focus box to go on first pages of your major sections (1.0, 1.1, 1.2, 2.0, 2.1-2.6)
- Should reflect major win themes for each section
- Key features and benefits of our solution, or statements of proof that we can do the job
- Use numbers to prove points – quantify and use specific names in the bullet
- Additional types of boxes:
 - *What's New*
 - *Did You Know?*
 - *Case Study*

HEADLINE: 2-3 LINES EXPLAINING OR SUMMARIZING THE BULLETS BELOW

- 4-7 Bullets
- 1-3 lines per bullet
- 12 to 18 total lines
- Use parallel construction with all bullets supporting the headline

Formatting Tables



OST GLOBAL SOLUTIONS



- To apply a style to a table, place your cursor inside the table and go to the *Table Design* Ribbon, then click on the picture of the correct style
 - If you don't see the style you want in the quick table styles top row, click on the downward arrow at the bottom right of the list to show all styles defined in the document
- If your table is more than a page long, make the header row repeat on the next page by going to the *Table Layout* Ribbon and clicking on *Repeat Header Rows*, under *Data*
- Sometimes a table cell will contain a large amount of text, and will move the entire row to the next page instead of breaking in the middle – to prevent this, open the Table Properties, go to the *Row* tab, and select *Allow row to break across pages*
- Adjusting the width of columns, either by dragging the cell borders with the mouse or by manually defining column widths on the *Table Layout* Ribbon, will allow you to make the most efficient use of space

Updating and Troubleshooting Reference Tables



OST GLOBAL SOLUTIONS



- Once the document is fully formatted, go up to the front matter at the top of the document, right-click in each reference table, and select *Update Table* from the drop-down menu
- Carefully check each table for missing or duplicated numbers, broken page numbering, or other unsightly errors
- Ensure each table breaks neatly across pages, and doesn't have widows, orphans, or blocks of white space between tables
- If using long narrative captions for your figures and tables, you may choose to just have the numbering and title in the reference table
 - Be aware that you will have to remove this text every time you update the table

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Do a Thorough Error Check Before Producing the Document



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- Have you applied the right heading styles to the correct headings and styles to text? Are any body paragraphs in a style other than Normal? Do you have any styles in the document that's extraneous?
- Have you checked section number flow, and does it flow properly?
- Are any tables split?
- Are any exhibits (graphics, tables) in the wrong color palette and need re-rendering or reformatting?
- Are all the exhibits in the latest versions?
- Do exhibit numbers increment correctly? Are they all present, or are any missing?
- Are exhibit callouts introduced in the text prior to their appearance, near the exhibit?
- Do all exhibits have action captions, ending with a period at the end?
- Has the double-spacing after a sentence been changed globally to single spacing?

Checklist (Continued)



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- Is the spacing correct and consistent between paragraphs and sections?
- Are there any sections starting at the bottom of the page, with a heading alone?
- Do all bulleted lists use the same bullets and indentation?
- Are all headers and footers extended to fit landscaped pages?
- If the requirement is to print double-sided, are the mirrored headers and footers generated correctly, so that page numbers sit at the outside margin?
- Do page numbers in the document increment correctly across section breaks?
- Is the page size back to normal in the section after a pullout?
- Has the document been spell-checked and edited?
- If you have converted the document to PDF, does it look the way it should or are there noticeable differences from the Word file?



- Printing and binding a hard-copy proposal
- Verifying soft copies on CD, thumb drive, or other storage media
- Preparing PDFs for electronic submission
- Submitting a proposal electronically
- Shipping or hand-delivering the proposal



Module 4

PRODUCTION AND SHIPPING

Printing and Binding a Hard-Copy Proposal



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- Always allow at least half a day to a full day for production
 - Length of time needed varies based on length of proposal, number of copies needed, and type of printer being used
 - If you do not have the capacity in-house to print and guillotine inserts for the front and spine of each binder, you will need to go to a print shop to have it done
- Check to make sure that soft copies on CD or thumb drive load and open correctly on a computer other than yours
- Always print an archival copy of the proposal for your own records

White Glove

Upon printing and binding your proposal, you need to round up 2-5 volunteers to go through and do a White Glove Review.

White glove reviews involve a team of people paging through multiple copies of the same volume together, looking for errors, misprints, blank pages inserted by the printer, or missing pages.

Usually, the person who owns the proposal will call out page numbers, so the others can verify that all copies were correctly produced.

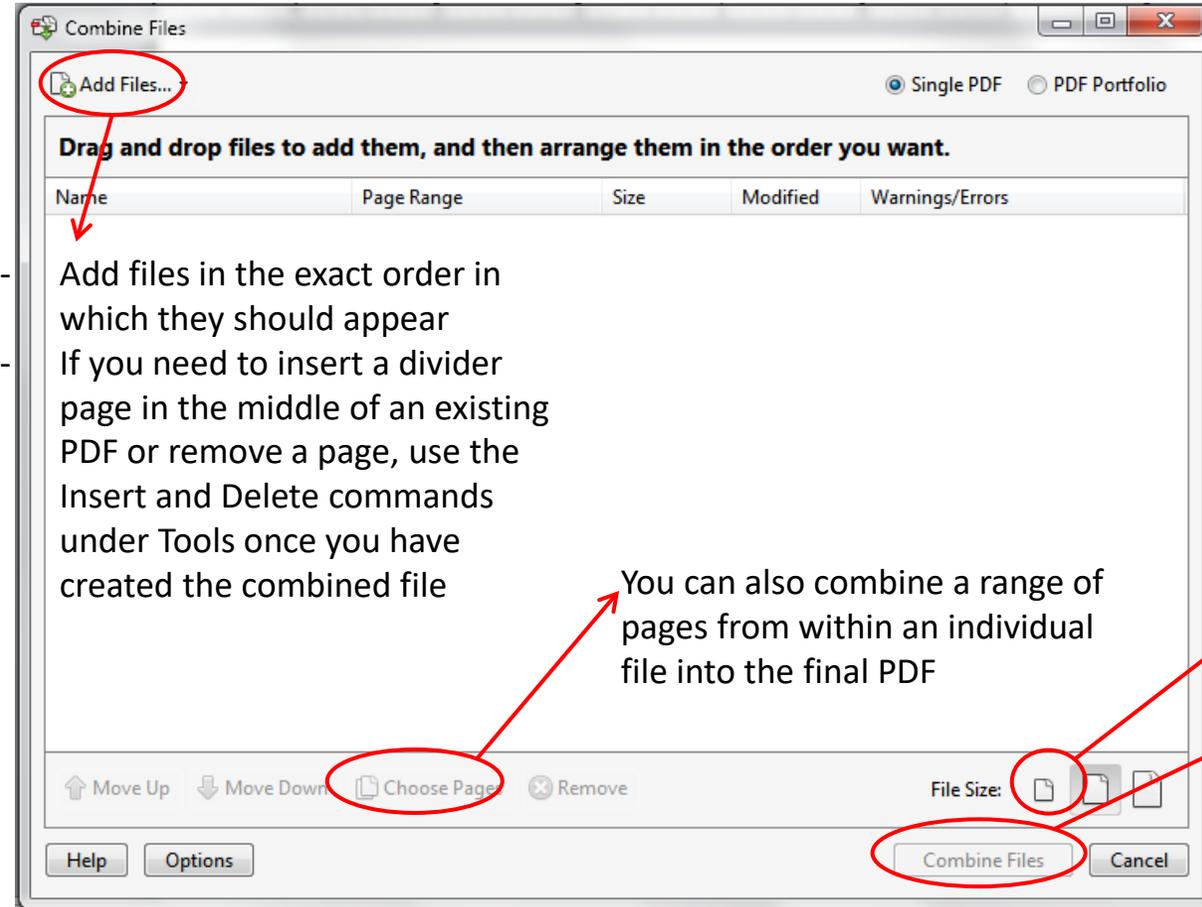
Prepping the Electronic Submission



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- Begin by saving all relevant Word documents as PDFs using the Save As PDF command in the File tab in Word
- Open your copy of Adobe Acrobat Pro, and select **Combine Files into PDF**
 - The following dialogue will pop up:



Choose the smallest file size, to make sure you don't overload the server during the submission process

You can also combine a range of pages from within an individual file into the final PDF

Once everything is in order, click on Combine Files to create the final PDF

Completing an Electronic Submission



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- Read through each file, page by page, checking for any mis-inserted or missing pages, showstopper errors caused by converting the file from docx to PDF, or any other irregularities
- Electronic submissions are easier in that they require less time to produce and fewer contingency plans, but...
 - They are harder because it's much easier for a large mistake to go by unnoticed
- NEVER wait until the last day to complete an electronic submission
 - Yes, almost all of us have done it – but it's miserable and stressful for everyone
- **Triple-check** your attachments before submitting your proposal
- Do not assume your proposal has gone through unless you receive confirmation from the government
 - Check delivery and read receipt options; if you submitted but haven't heard anything, give your govie a call

Preparing the Proposal for Hand-Delivery



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- The government provides the correct shipping address in the RFP, in the Proposal Submission Instructions
- Instructions will include the location to which the proposal must be delivered and the due date and time of submission
- If hand-delivering the proposal to a local address, draw up a delivery receipt with the solicitation information, including RFP number and due date, and a place for the recipient to print his/her name and sign the receipt
 - Learn in advance about security checkpoints or peculiarities of the building to which you're making the delivery – ensure you know facility access procedures and allow ample time

WHEN RESULTS MATTER **MIND**
OVER MACHINES

Date of Delivery: Mar 16, 2013

Deliver To: _____
Agency: Department of Health and Human Services
Address: PROGRAM SUPPORT CENTER
DIVISION OF ACQUISITION MANAGEMENT, SAS
PARKLAWN BUILDING, ROOM 4-101
5600 FISHERS LANE
ROCKVILLE, MD 20857

Re: Solicitation Number HHSP2332010EAD

This confirms the Government's receipt of Mind Over Machines' proposal in response to the above-referenced solicitation. Our submittal was hand-delivered by Paul-Sean Gray and included the following:

- Volume I - original and extra printed copy, and 11 CDs
- Volume II - original and extra printed copy, and 11 CDs
- Volume III - original and extra printed copy, and 6 CDs
- Copy of the Authorized Federal Supply Service Information Technology Schedule Pricelist and contract

Accepted for the Government by: _____ Date/Time: _____
Name _____
Title _____

Preparing the Proposal for Shipping



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- If you are shipping the proposal, it is wise to produce two sets of binders:
 - One that is shipped several days before the deadline
 - Second set which can be hand-carried to the customer site if something goes awry
- Use a box large enough to neatly fit all the binders
- Tape a printed copy of the shipping address or shipping label to the top of the box
- Always write RFP number on the box, and follow any additional instructions



Summary and Recap



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What have you learned?

- What are the attributes of a great DTPer?
- What are the different ways of navigating quickly through a document?
- What is the visual hierarchy?
- What is the most readable page layout?
- How do you fix a table of contents that is not displaying all of the outline headings?
- What is your biggest take-away from the class?



Thank You for Attending!



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