

# **This is no fantasy league: Virtual proposals are reality**

**Mitch Boretz, on behalf of the  
APMP Electronic Proposal Task Force**

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**APMP-SOCAL Training Day**



# Kickoff

- My oft-repeated refrain: Ten years ago, color pictures in proposals were rare. Ten years from now, moving pictures in proposals will be common. So what do we do to manage this change?
- APMP established the Electronic Proposal Task Force in 2010 to explore these questions and build consensus toward a paperless proposal environment that works for proposer and customer.



# Game plan

- In this hour, we will discuss:
  - What the task force is.
  - What it has accomplished so far.
    - Initial observations.
    - Issues for each working group, leading to a wish list for the ideal paperless proposal environment.
  - What the task force will do next.
  - Your ideas.



# About the task force

- APMP invited suggestions for task forces in fall 2009. The board accepted this idea in February 2010.
- We announced it in the spring *APMP Perspectives* and on the APMP LinkedIn site and got more than 100 responses from people who wanted to participate.
  - Not all were APMP members. We decided that proposal people need to be APMP members, but procurement people don't have to be.



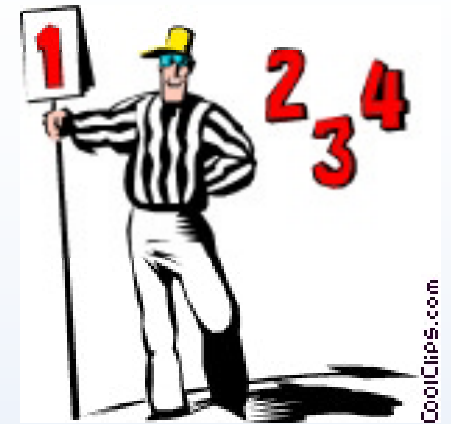
# Getting started

- We formed four working groups:
  - **End-to-end: authoring, submission, and review.** Chaired by Chris Cooper (Xait Inc.) and Randy Britt (Akima Management Group).
  - **On being paperless.** Led by Russ Huffman (Reznick Group) and Siva Malkapuram (Wipro Technologies).
  - **Government relations.** Led by Donna Quesinberry (DonnaInk Publications) and Max Bernstein (NASA procurement officer).
  - **Commercial sector.** Led by Cindy Ayling, IBM.



# Ground rules

- We are not here to debate whether paperless proposals are a good thing or a bad thing. We assume that the trend toward paperless requests for proposals, Q&A, submission, and review will continue.
- Therefore, our mission is to guide the migration to a paperless environment so buyer and seller can be more effective.



# Ground rules

- Some initial observations:
  - In general, the on-line environment is accessible and secure enough for dissemination of solicitations, submission of proposals, review of proposals, and award management.
  - Proposal systems should be “platform-agnostic”: the proposer should be able to use any software on any computer to write and submit a proposal. However, standardizing on things like Adobe Acrobat is desirable for the sake of consistency.



# Ground rules

- Initial observations:
  - The most hated thing is a fill-in-the-blank format that limits the character count on each response. Pictures, tables, and other elements tell the story. Proposal systems must accept more than plain text.



# Ground rules

- Initial observations:
  - Similarly, there should be no on-line ambushes. The RFP should tell you everything required for the proposal. There should be no surprises when you get on-line. For a bad example, see ProposalCentral.



# Ground rules

- Initial observations:
  - The best on-line systems keep you on-line least. In other words, most of the proposal preparation should be done off-line, so either one big file or multiple files constituting the whole proposal are submitted rapidly. NSF Fastlane is a great example: You prepare the proposal off-line, and any authorized member of the proposal team can upload parts of the proposal at any time. Sections can be deleted and updated all the way until proposal submission.



# Ground rules

- Initial observations:
  - There has been discussion about whether it is better to submit on-line or to submit a disk. As we migrate toward more video in proposals, a DVD format might make sense.
    - DARPA already requires some submissions on CD or DVD, with encryption. You send in the disk and e-mail the password.
    - NASA: depends on the size of the proposal. Small proposals (5-15 pp) are submitted on-line; “big mission proposals” are submitted on disk with one printed copy for validation.



# Ground rules

- A slight digression: Example of DARPA instructions

All abstracts/proposals submitted electronically by means of an Electronic Business Application Tool or proposal submission website (not including Grants.gov) must be encrypted using Winzip or PKZip with 256-bit AES encryption. Please submit full proposals as two separate documents, Volume I (Technical and Management Proposal) and Volume II (Cost Proposal), uploaded as one single encrypted .zip file.

Abstracts/proposals not zipped/encrypted will be rejected by DARPA. An encryption password form must be completed and e-mailed to [DARPA-BAA-10-90@darpa.mil](mailto:DARPA-BAA-10-90@darpa.mil) at the time of submission. See <https://dsobaa.sainc.com> for the encryption password form.

Note the word “PASSWORD” must appear in the subject line of the above e-mail and there are minimum security requirements for establishing the encryption password. Failure to provide the encryption password may result in the abstract/proposal not being evaluated. For further information and instructions on how to zip and encrypt abstract/proposal files, see <https://dsobaa.sainc.com>.



# Ground rules

- Initial observations:
  - Moving to a paperless environment could and should change the definition of what a proposal is. We need to look at how to integrate sound, moving pictures, and interactivity (such as hyperlinks) into proposals.
  - Maybe think of it this way: Today we submit a written document and then get invited to do an oral presentation. Soon maybe we submit a recorded oral presentation and get invited to follow up with the written details.



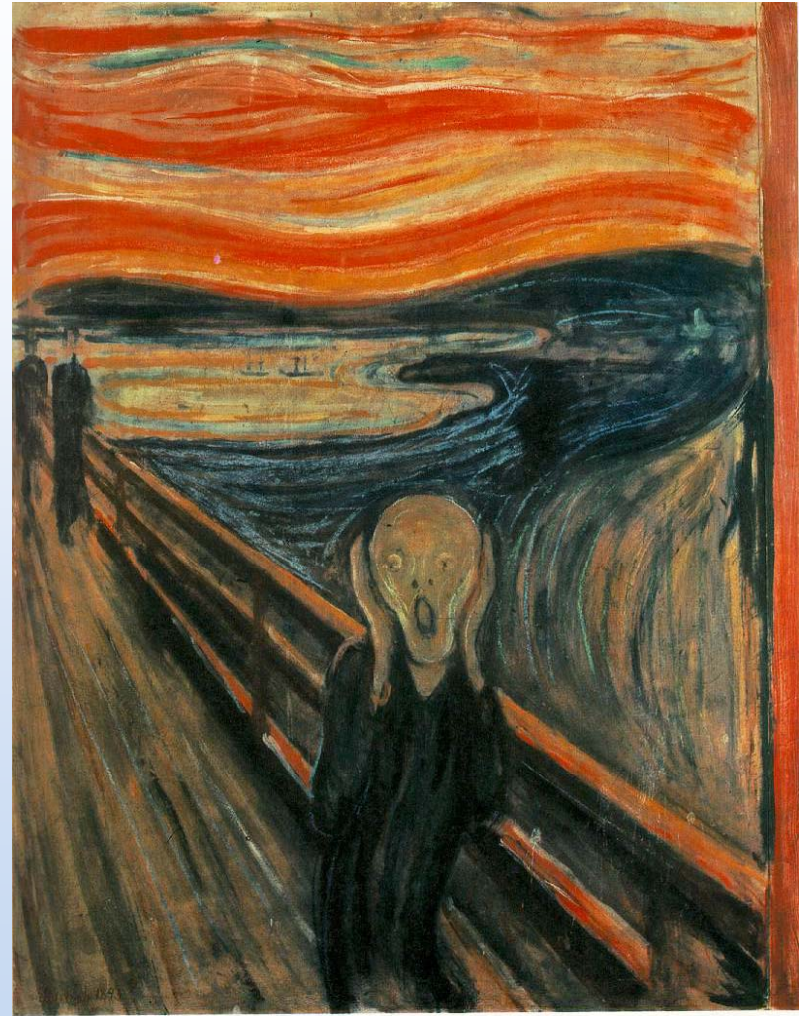
# End-to-end group

- Compatibility: We already discussed the need to be platform-agnostic. What can companies like Xait (on the proposal writing side) and DecisionPoint (on the review side) do to integrate the entire process?
- Adobe Acrobat is a de facto standard. Do we need others, like .jpg and .mpg, for the files we all agree to use?



# End-to-end group

- Format: If we really want integrated text, sound, and pictures, we need to think the unthinkable: Will PowerPoint replace Word as the proposal writer's basic tool?



# End-to-end group

- Format: If proposals in the not-too-distant future look more like movies or Facebook pages than documents, what are the limits? Do we assume that the customer and reviewers have unlimited disk storage and time?
  - Does the first team to hire James Cameron win?



# End-to-end group

- At the other extreme, we have already registered our disdain for plain-text fill-in-the-blank systems. However, that could be used as a quick summary sheet, leading to links with the detailed answers for each section.



# End-to-end group

- The back end: Review, selection and award.
  - From Max Bernstein, NASA:
    - For science proposals at NASA we have all team member verify participation online, so we have a database of who is on what proposal to avoid conflict of interest when proposals are reviewed (electronically). Then when selections are made, the decision letter and evaluation are downloaded electronically by the offeror, and the official paperwork (tech eval) is available electronically to procurement so that I can upload it here in DC, the folks at Greenbelt can download it and generate the PR and then the folks at NSSC can download it down there in Mississippi where they cut the grants.



# On being paperless

- The 8½ x 11 page or the A4 page is really just an artifact of the printed proposal. In a paperless environment, there is no reason to remain constrained to this format.
- Moving pictures, sound, and hyperlinks can be huge tools to help us tell our story. So how do we incorporate them within the constraints of time, budget, and file size for a proposal?



# On being paperless

- Siva Malkapuram's pros and cons:
- Pro:
  - Enhances understanding by better visualization as to how the product/solution will work.
  - Can have voice over to assist the visualization.
  - Actual video of the product/solution implemented elsewhere, along with references, can be embedded as an audio/video file.



# On being paperless

- Siva Malkapuram's pros and cons:
- Con:
  - Difficult to evaluate or score just by skimming/glancing.
  - Time-consuming to produce.
  - Higher cost of production.
  - A low-cost alternative for video/animated proposals can be PowerPoint-based proposals.



# On being paperless

- Donna Quesinberry thinks big:
  - Beyond classic creation and distribution among trend-setting technologies – is there an avenue for discussing actual proposal creation redirection? Is the classic standard of development the most proficient? Without going overboard – it would seem worthy of consideration to discuss the capability of Nex-Gen thinking in as far as the creative process for solutions.



# On being paperless

- From Rachel Harold, UK: Paperless should still mean printable.
  - I'm not sure it means that the commissioners are that paperless, except when distributing the documents around their organisation. ... I remember speaking to one bid evaluator who'd actually done some scoring of bids he'd printed out whilst in his car in a traffic jam! He said tight timescales meant that he had to use any spare time he could find to get the bids evaluated and rated.



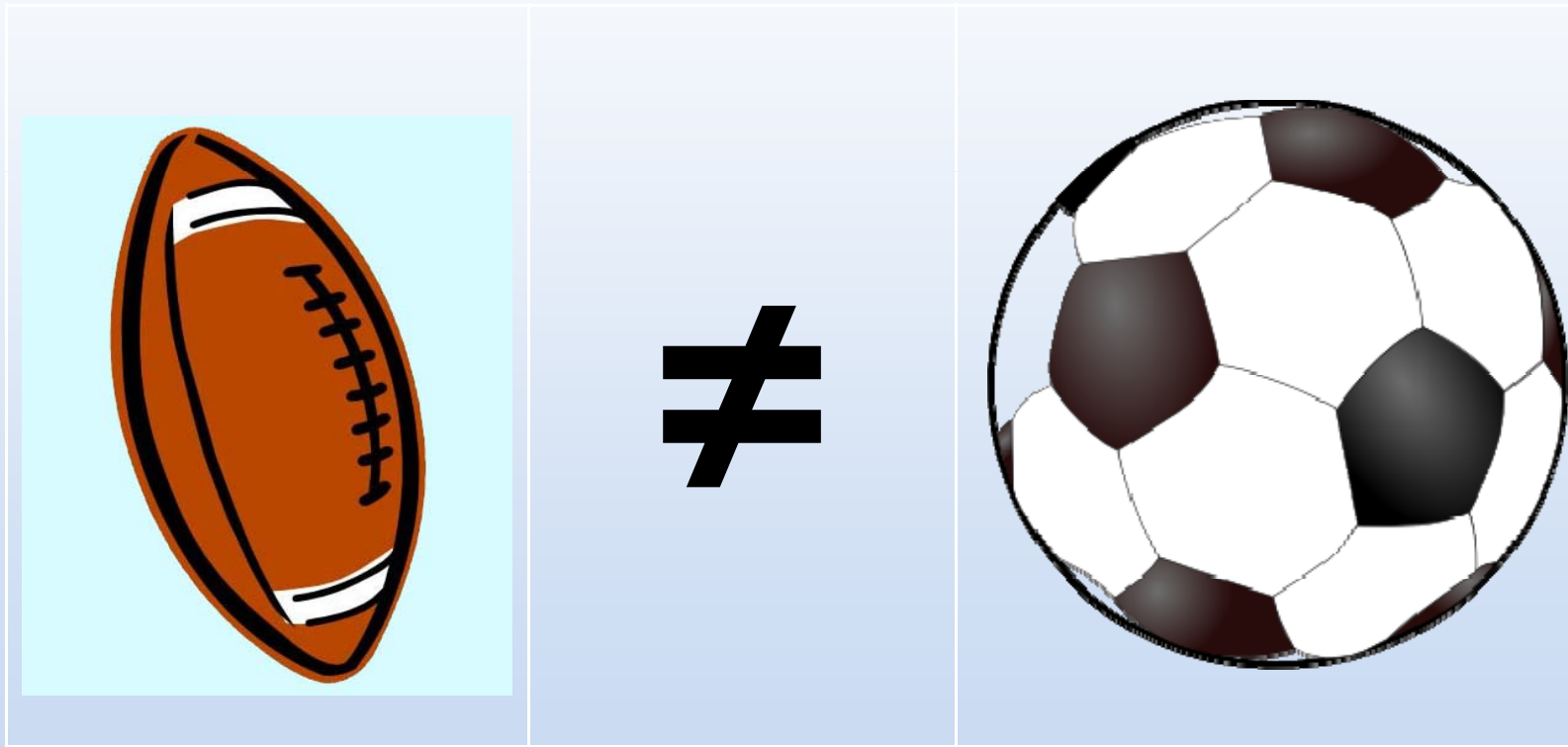
# Government relations

- Without the procurement people involved, we are just talking to ourselves.
- Max Bernstein of NASA was the first procurement person aboard. He and Donna Quesinberry are recruiting others.
- If you know procurement people who can participate, please put them in touch with me!



# Government relations

- This is an international task force. We will need to address Europe and Asia.



# Government relations

- The third-party proposal sites, like Grants.gov and ProposalCentral, so far have been completely unresponsive.



# Commercial

- The government environment is far from monolithic, but the commercial environment is highly diverse. Cindy Ayling will take on the challenge of translating what we do to the commercial sector, and translating the commercial sector's needs to our work.



# What next?

- Get the government people on board.
- Develop a conceptual design of the “ideal” paperless proposal environment:
  - Solicitation.
  - Questions and answers. (For a good example, see [www.fedconnect.net](http://www.fedconnect.net).)
  - Submission.
  - Review.
  - Award.
- Collect comments at APMP Forum.



# What next?

- Have a panel discussion at the 2011 APMP international meeting, and publish in the fall 2011 APMP Journal.
- Start the migration in the U.S., perhaps on a non-competing renewal or some other opportunity where the technical risks are low.
- Win the Nobel Prize by 2013. Alternatively, figure out how to retire before this stuff becomes real.



# Acknowledgments

- The APMP board, and especially Bobbie O'Brien.
- Ruth Turman, an organizational genius and the only proposal manager in America without a telephone.
- Working group leaders: Cindy Ayling, Max Bernstein, Chris Carter, Russ Huffman, Siva Malkapuram, Donna Quesinberry.

