

# Proposal for **Research Program Outreach and Administrative Assistance**

Prepared by:

**SCHATZ**  
STRATEGY GROUP

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07/21/2025

State of Nebraska  
Department of Transportation  
Attn: Dana Smith  
PO Box 94759  
Lincoln, NE 68509-4759

Re: Solicitation #R420-25

Thank you for the opportunity to submit our proposal in response to Solicitation #R420-25. We welcome the opportunity to partner with the Nebraska Department of Transportation (NDOT) in advancing its research program outreach and administrative functions through accessible communication and efficient coordination.

Schatz Publishing Group (Schatz) is a communications firm with over thirty years of experience supporting federal and state transportation agencies. Our team brings specialized expertise in technical writing, stakeholder outreach, and multi-state program management, including deep familiarity with the Federal Highway Administration (FHWA), Virginia Department of Transportation (VDOT), and pooled funds.

We are confident in our ability to meet and exceed NDOT's expectations. Our team of over 90 professionals offers depth and redundancy across all project roles, from editorial management and content development to graphic design, reimbursement facilitation, and stakeholder communication. We ensure that all deliverables are compliant with the federal Plain Writing Act and Section 508 accessibility standards, delivering clear, timely, and accurate products to both technical and general audiences. We have also managed the coordination of government travel for several years.

Our complete response, including the technical approach, proposed personnel, organizational experience, and cost structure, is enclosed. We welcome the opportunity to discuss further how Schatz can support NDOT's mission and look forward to the possibility of working together.

Thank you for your consideration.

Sincerely,



Sheree Lewis  
Manager

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# Corporate Overview

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## Bidder Identification and Information

### *Company Name and address:*

Schatz Publishing Group, LLC

11950 W. Highland Ave., Blackwell, OK 74631

Schatz Publishing Group, LLC was organized in 1991.

The organization's name was changed from Emu Today & Tomorrow, LLC to Schatz Publishing Group in 2000. The form of the organization has not changed.

## Financial Statements

Schatz Publishing Group (Schatz) is a privately held firm with a strong financial stability and operational longevity record, supporting federal, state, and local government clients for over 34 years. Our client base includes the U.S. Department of Agriculture, Federal Highway Administration (FHWA), Federal Motor Carrier Safety Administration, Department of State (DoS), Department of the Treasury, and the Department of Housing and Urban Development. Schatz specializes in research outreach, technical writing and administrative support for complex, multi-state and multi-agency initiatives. We assist with the development of annual financial reports, budget summaries, and program fact sheets, and administer reimbursement processes for federally funded projects. This experience demonstrates our ability to manage and account for significant project funds, coordinate with multiple stakeholders, and deliver compliant materials on time and within budget.

Schatz brings extensive technical writing and editing experience with the U.S. Department of Transportation (DOT), including developing technical summaries and fact sheets for FHWA, supporting the Exploratory Advanced Research (EAR) program, and contributing to *Public Roads* magazine and the "Along the Road" section. Our state DOT support includes technical editing for the Virginia Department of Transportation (VDOT). We have also promoted the Transportation Pooled Fund program and administered travel reimbursement for other multi-state research programs demonstrating our ability to ensure accurate accounting and timely disbursement of funds to participating entities.

Schatz maintains a longstanding relationship with BancFirst, located at 101 N Main St, Blackwell, OK 74631. Our contact is Jared Grell and he can be reached at (580) 363-4141. We implement robust internal controls and financial management practices to meet the requirements of federal clients, as reflected in our history of positive performance evaluations and contract renewals. We offer the stability, technical expertise, and experience necessary to fulfill the Research Program Outreach and Administrative Assistance contract requirements.

Schatz has no judgments, no pending or expected litigation, and no known real or potential financial reversals which might materially affect the viability or stability of Schatz.

## Change of Ownership

Schatz has maintained stable ownership and leadership since its founding in 1991. No change of ownership is anticipated. We maintain internal succession and contingency planning to ensure continuity of service.

## Office Location

Contract oversight will be managed from our headquarters at 11950 W. Highland Ave, Blackwell, OK. This site supports all documentation, communication, and virtual collaboration required by the State of Nebraska Department of Transportation (NDOT).

## Relationships with the State

Schatz has not held contracts with the State of Nebraska within the past five years, nor do we currently employ any former State of Nebraska personnel.

## Bidder's Employee Relations to State

No individuals currently employed by Schatz or as subcontractors to Schatz are, or have been, employees of the State of Nebraska within the past twelve (12) months.

## Contract Performance

Schatz affirms we have not experienced a contract termination for default within the past five (5) years. There are no instances of non-performance or poor performance resulting in a notice to stop performance or delivery.

We have experienced the recent loss of contracts due to government-wide cuts made under the Department of Government Efficiency (DOGE).

Account	Contact Name	Phone Number	Length of Service	Reason for Loss
Federal contract: Innovation in Affordable Housing Student Competition	Patricia O. Akinrogunde, Ed.D., CPCM	202-402-7741	6 years	DOGE cuts
Federal contract: Focus Groups for US Customs and Immigration Services	Mary Shinney	802 760-0114	2 years	DOGE cuts

## Summary of Bidder's Corporate Experience

Schatz has extensive experience delivering research outreach, technical communications, and administrative support for government research programs with multi-state stakeholder engagement.

Department of Transportation (DOT), Federal Highway Administration (FHWA), Turner-Fairbank Highway Research Center	
Contract Name	Marketing and Communications, Editorial and Publications Support, and Publication of <i>Public Roads</i> Magazine
Time Period of Project	9/30/20–present
Scheduled and Actual Completion Dates	9/30/20–9/29/25, contract is still in progress
Contact Information	TaMara McCrae, tamara.mccrea@dot.gov, 202-493-3382
Responsibilities	<p>Prime Contractor. Relevance. As the lead marketing and editorial partner for FHWA’s Turner-Fairbank Highway Research Center, Schatz produces clear, accessible research communications across multiple FHWA programs. Our experience includes:</p> <ul style="list-style-type: none"> <li>• Writing technical summaries and fact sheets in collaboration with subject matter experts for FHWA, including the Exploratory Advanced Research (EAR) Program. See Appendix A-1 for a research summary developed for FHWA’s EAR Program, which mirrors NDOT’s technical summary deliverable in both format and clarity.</li> <li>• Developing news polls content, including the <i>Public Roads</i> “Along the Road” section and R&amp;T Now newsletter articles. A sample from the “Along the Road” column can be seen in Appendix A-2, demonstrating our ability to deliver timely, public-facing updates in the format and tone NDOT expects for its news polls.</li> <li>• Editing and formatting FHWA reports for public release, ensuring compliance with plain language and Section 508 accessibility standards.</li> </ul> <p>We manage the full communications lifecycle—from research synthesis to design and review—delivering materials that meet FHWA editorial guidelines and effectively translate technical content for public and stakeholder audiences. This positions us to produce high-quality, NDOT-compliant outreach materials across all required formats.</p>

	<div data-bbox="535 205 990 625" data-label="Image"> </div> <p>Schatz has supported FHWA’s Transportation Pooled Fund (TPF) Program by developing outreach materials that communicate research outcomes, multi-state collaboration, and appropriate use of SPR Subpart B (SPR-B) funds. Our work helps stakeholders understand how pooled fund investments support national transportation priorities. We have:</p> <ul style="list-style-type: none"> <li>• Developed fact sheets and summaries that explain TPF Program’s structure, funding mechanisms, and research results. See Appendix A-3 for a TPF Program fact sheet that illustrates how we visualize funding use and research impact for stakeholder communication—directly aligned with NDOT’s SPR fact sheet goals.</li> <li>• Created content specifically focused on helping state agencies understand how SPR-B funding supports participation in pooled fund projects.</li> <li>• Aligned all deliverables with FHWA style, accessibility, and state communication goals.</li> </ul> <p>These experiences demonstrate our ability to support NDOT’s pooled fund efforts with clear, compliant, and stakeholder-ready materials.</p> <p>No subcontractors are used for this project.</p>
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Department of Housing and Urban Development (HUD), Office of Policy Development and Research	
Contract Name	Innovation in Affordable Housing Student Design and Planning Competition
Time Period of Project	8/15/19–06/30/24
Scheduled and Actual Completion Dates	8/15/19–06/30/24



Contact Information	Jagruti Rekhi, <a href="mailto:Jagruti.D.Rekhi@hud.gov">Jagruti.D.Rekhi@hud.gov</a> , 202-402-4512 Cathy J. Baker, 817-978-5404, <a href="mailto:cathy.j.baker@hud.gov">cathy.j.baker@hud.gov</a>
Responsibilities	<p>Prime contractor. Relevance: Our team successfully managed end-to-end travel planning and reimbursement for multi-team site visit initiatives located in various states and final presentations held in DC. We coordinated travel for finalists in a government-funded program, working closely with each team to identify members eligible for reimbursable travel under program guidelines.</p> <p>Our responsibilities included:</p> <ul style="list-style-type: none"> <li>• Gathering travel details from participating team members;</li> <li>• Booking hotel accommodations on their behalf;</li> <li>• Negotiating reduced group rates by securing hotel room blocks;</li> <li>• Attending site visits to ensure smooth logistics and provide on-site support;</li> <li>• Collecting and organizing travel receipts from participants following each visit;</li> <li>• Submitting reimbursement documentation in alignment with program requirements.</li> </ul> <p>All reimbursable expenses were tracked and processed according to established funding limitations, ensuring compliance and accountability. Our hands-on approach and proactive coordination helped streamline the process for all parties and ensured accurate and timely reimbursement for each traveler.</p> <p>No subcontractors were used for this project.</p>

Virginia Department of Transportation (VDOT)	
Contract Title	Technical Editorial Services
Time Period of Project	10/01/2024- 09/30/2025
Scheduled and Actual Completion Dates	10/01/2024- 09/30/2025, This contract does have an option to renew for four (4) successive one (1) year periods.
Contact Information	Michael Fitch, Ph.D. 434-293-1962 <a href="mailto:michael.fitch@vdot.virginia.gov">michael.fitch@vdot.virginia.gov</a>



Responsibilities	<p>Prime Contractor. Relevance: Schatz currently supports the VDOT with technical writing and research communications. Through that work, we have gained firsthand experience with:</p> <ul style="list-style-type: none"> <li>• State-level transportation research dissemination</li> <li>• Coordination with VDOT engineers and program managers</li> <li>• Formatting deliverables to match state and federal standards</li> </ul> <p>This experience strengthens our readiness to meet NDOT's expectations and adds momentum to our expanding state DOT portfolio. Appendix A-5 includes a VDOT research report we edited, reflecting our state DOT experience and ability to produce polished, compliant research deliverables for technical audiences.</p> <p>No subcontractors are used for this project.</p>
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## Summary of Bidder's Proposed Personnel/Management Approach

Schatz's proposed personnel structure is built to meet NDOT's specific needs for research communication and pooled fund administration. Our team brings deep transportation-sector experience and clearly defined roles to ensure accountability and delivery precision.

### Key Personnel

Schatz proposes the following key personnel:

- **Project Manager** – Provides oversight of contract and manages travel reimbursements for the Midwest Roadside Safety Pooled Fund, ensuring policy compliance, accuracy, and full documentation. Serves as NDOT's primary point of contact, leading all deliverables, timelines, and quality control.
- **Editorial Manager** – Oversees editorial, design, and admin teams with extensive experience managing multi-disciplinary transportation communication projects.
- **Technical Writer/Editor** – Convert complex final reports into accessible summaries. Each writer is trained in FHWA SPR guidance and plain language standards. Experienced in developing short-form, timely, and visually supported updates. Collaborates directly with NDOT's Research Section.
- **Graphic Designer** – Creates concise, data-driven one-pagers for SPR and pooled fund projects, with expertise in data visualization and stakeholder communications.

We have deep benches for each of these positions, allowing us to provide both surge support if needed and back up support in case of staff illness or vacation.

Resumes are located in Appendix B.

## Staff Bios (Resumes are located in Appendix B)

Name/Position	Jill McAninch, Project Manager
Experience	Ms. McAninch is a seasoned project manager with 18 years of experience leading communications initiatives. She is skilled in coordinating cross-functional teams and managing client expectations. She has extensive experience in budget oversight, including reimbursement processes for multi-state initiatives, ensuring compliance with federal and local requirements.
Name/Position	Allison Simmons-Jacobi, Editorial Manager
Experience	Ms. Simmons-Jacobi has 30 years of experience in transportation and energy communications, leading editorial, design, and administrative teams on complex public outreach projects. She specializes in developing public-facing content for websites and publications, focusing on editorial accuracy, design quality, and message clarity.
Name/Position	Mary E. Lee, Editorial Manager and Technical Writer/Editor
Experience	Ms. Lee brings 27 years of experience in technical editing, process documentation, and content development. She specializes in refining complex materials with precision, applying multiple editorial style guides to ensure clarity, consistency, and quality.
Name/Position	Chris McCoy, Technical Writer/Editor
Experience	Mr. McCoy is a seasoned editor and writer with over 16 years of experience producing clear, engaging content across diverse subjects and formats. He specializes in translating complex technical information into accessible language for public and private audiences. His work spans web and print, with notable contributions to government websites in defense, health, and transportation.
Name/Position	Christine Walsh, Technical Writer/Editor
Experience	With 25 years of editorial experience, Ms. Walsh excels at refining multichannel content to ensure clarity, accuracy, and consistency. She applies plain-language principles and adheres to client style guides, delivering high-quality transportation research across platforms. Skilled at managing multiple projects under tight deadlines, she consistently maintains rigorous editorial standards.
Name/Position	David McDonald, Graphic Designer
Experience	Mr. McDonald brings 22 years of experience in publication formatting, layout, and visual design, with a focus on federal communications. He supports the Federal Highway Administration (FHWA) by designing a wide range of publications, including TechBriefs, fact sheets, reports, and materials for the Exploratory Advanced Research (EAR) Program.

## Management Approach

We prioritize:

- Proactive communication with NDOT
- Rigorous quality control using editorial checklists and peer review
- Seamless workflow integration through clear role assignments and established review cycles

Our teams follow structured editorial and administrative protocols—including Section 508 accessibility, Basecamp project tracking, and collaborative client review—to ensure NDOT receives timely, accurate, and compliant deliverables. With decades of experience managing federal and state transportation contracts, Schatz offers NDOT a responsive, detail-oriented, and capable delivery partner.

## Subcontractors

Schatz will not use subcontractors for the Research Program Outreach and Administrative Assistance contract. All work will be performed by our in-house team of experienced professionals skilled in technical writing, editorial production, travel reimbursement, and project management.

## Technical Response

Schatz supports NDOT by delivering clear, accessible research communications and efficient pooled fund administration. Our approach translates complex transportation research into public-facing deliverables while managing multi-state reimbursements with accuracy and transparency.

## Understanding of the Project Requirements

Schatz understands NDOT's needs for both technical communication and pooled fund coordination. We have supported FHWA, DOT, and VDOT with similar deliverables and operations. Our work includes:

- Technical summaries, fact sheets, and stakeholder communications for the FHWA Turner-Fairbank Highway Research Center
- Program-level outreach materials with plain language, infographics, and accessibility compliance
- Full understanding of pooled fund travel reimbursement processes aligned with state-specific policies



*The team assists in the development of success stories, summaries, reports, and other documentation for FHWA's Transportation Pooled Fund program.*

## Proposed Development Approach

Our team delivers high-quality communications and logistical support through a structured, deadline-driven workflow that emphasizes clarity, consistency, and accountability. We are experienced in managing complex, multi-stakeholder projects, and our approach is designed to ensure timely delivery, precision in execution, and alignment with NDOT's goals and standards.

Through every step of the engagement, our team applies proven project management practices to meet all deadlines and deliverables. We pride ourselves on being proactive, communicative, and reliable partners, and we are committed to helping NDOT achieve its goals through effective and efficient support services.

Our first step is to meet and ensure we understand what NDOT expects in terms of our service, the timeline, revisions, preferences, style guides, considerations and vision for the final product.

This step is followed by execution, which includes regular communication intervals, quality assurance, and coordination.

NDOT can expect the following deliverables and services as part of our development approach:

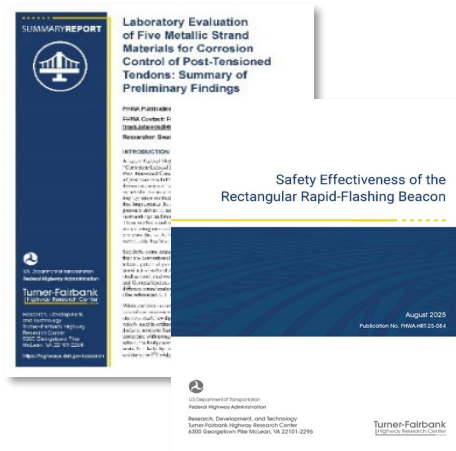
- **Research Summaries**  
We will produce up to four (4) professionally designed 4-page research summaries each year. These summaries will be developed using plain language principles to ensure accessibility and clarity for broad audiences. Our team will integrate custom visual elements—including charts, infographics, and diagrams—to effectively communicate key findings and support NDOT's research objectives.
- **News Polls**  
We will draft ten (10) news polls annually, each approximately 500 words in length. These polls will be developed in close collaboration with NDOT to ensure topical relevance and messaging accuracy. Graphics will be included to enhance engagement, and our editorial process is optimized for expedited turnaround, allowing NDOT to maintain a responsive and timely communications strategy.
- **Program Fact Sheet**  
Our team will design a high-impact, double-sided fact sheet summarizing SPR and Midwest Roadside Safety Pooled Fund activities. This piece will be visually engaging, easy to distribute, and crafted to clearly convey the value and impact of these programs to internal and external stakeholders.
- **Pooled Fund Travel Reimbursement Coordination**  
We will manage travel reimbursement coordination for up to 30 states participating in the pooled fund. This includes reviewing documentation for completeness and compliance, tracking reimbursement status, and consolidating all billing into a clear,

organized invoicing system for NDOT. Our team's attention to detail and experience with interagency coordination ensures a smooth and compliant reimbursement process.

## Editorial and Quality Control Process

Each deliverable follows a rigorous editorial process to ensure clarity, accuracy, and compliance with federal standards. Our approach includes:

- Assign technical writers trained in FHWA SPR rules and federal plain language standards.
- Use Adobe Creative Suite to develop graphics that meet Section 508 accessibility and NDOT branding requirements.
- Implement editorial workflows with internal peer review, iterative NDOT feedback, and formatting for both print and digital distribution.



*We regularly assist FHWA with writing, editing, graphic design, layout, and publication of Report and Summary Reports*

## Technical Requirements

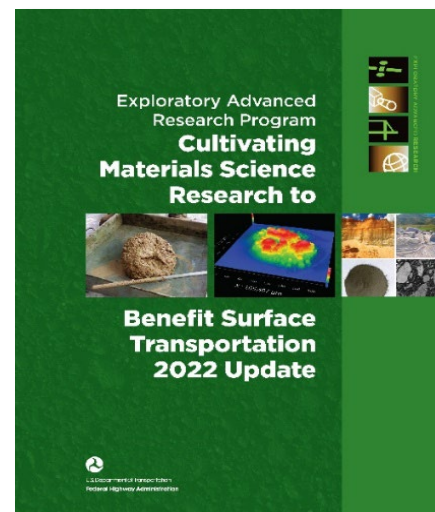
Schatz will deliver NDOT-ready research communications and administrative support through structured project management, proven editorial workflows, and a team of experienced personnel. Our approach, refined on contracts with government entities such as FHWA, DoS and HUD, ensures every deliverable is accurate, accessible, and on time.

We assign dedicated experts to each project component, including:

- Research Summary Writers, trained in FHWA SPR standards
- News Poll Developers, experienced in public-facing, plain-language content
- Fact Sheet Specialists, skilled in visualizing program health and research impact

Using tools like Basecamp and internal QC protocols, we:

- Track deliverables and review cycles
- Coordinate directly with NDOT staff



*For the Turner-Fairbank Highway Research Center in McLean, VA, Schatz assists in writing, editing, layout, graphic design, and publishing of EAR Research Summaries.*

- Document decisions, drafts, and approvals
- Pair each submission with a second-level editorial review for clarity and compliance

For pooled fund travel reimbursements, we:

- Communicate directly with state reps
- Review and verify documentation against each state's policy
- Maintain audit-ready records and submit consolidated, transparent invoices to NDOT

**The result:** clear communications, efficient reimbursements, and complete confidence that NDOT's standards are met at every step.

## Reimbursement Facilitation Workflow

We use a repeatable, policy-aligned process to manage multi-state travel reimbursements efficiently and transparently. The workflow that we will use for the annual Midwest Roadside Safety Pooled Fund meeting includes:

- Distribute clear instructions, submission deadlines, and standardized documentation templates to all travelers prior to the annual meeting.
- Collect approved travel documentation via secure email post-meeting, verifying completeness and adherence to travel policy.
- Track submissions using structured spreadsheets and checklists; resolve missing or inconsistent information directly with travelers.
- Process reimbursements according to individual state travel policies, maintaining detailed records for audit readiness.
- Prepare and submit a consolidated invoice package to NDOT within the required four-week window, including itemized expense summaries and administrative fees.
- Provide NDOT with weekly status updates throughout the reimbursement window, ensuring full transparency and responsive issue resolution.

## Detailed Project Work Plan

This work plan outlines the tasks, responsibilities, and timelines associated with providing communications and logistical support services to NDOT. Our structured workflow ensures consistent quality, efficient delivery, and ongoing collaboration.

### 1. Research Summaries (Up to 4 Annually)

Task	Description	Timeline	Responsible Parties
Project Kickoff	Meet with NDOT to identify annual summary topics and timeline	Scheduled upon award	Schatz PM + NDOT



Task	Description	Timeline	Responsible Parties
Content Development	Draft plain-language summaries from source materials	1 week per summary	Writer/Editor
Visual Design	Create custom charts, graphics, and layout design	1-2 weeks per summary	Graphic Designer
NDOT Review	Submit for NDOT review, revise based on feedback	1–2 weeks per round	Editorial Manager
Final Delivery	Provide press-ready PDFs and web-optimized files	Per summary schedule	Editorial Manager

## 2. News Polls (10 Annually)

Task	Description	Timeline	Responsible Parties
Topic Coordination	Meet with NDOT quarterly to identify poll topics	Quarterly	Schatz PM + NDOT
Drafting	Write 500-word articles, incorporating NDOT guidance	1 week per poll	Writer/Editor
Graphics	Develop simple data visuals or header graphics	2–3 days per poll	Designer
Review & Edit	Internal QA + NDOT feedback and revisions	3–5 days per poll	Editor + NDOT
Final Submission	Submit final copy and visuals for NDOT use	Rolling basis	Project Manager

## 3. Program Fact Sheet (1 Annually)

Task	Description	Timeline	Responsible Parties
Planning	Meet with NDOT to confirm content and objectives	Q2	Schatz PM + NDOT



Task	Description	Timeline	Responsible Parties
Drafting	Write copy summarizing SPR and Pooled Fund activities	1–2 weeks	Writer/Editor
Design	Create double-sided fact sheet layout and graphics	1 week	Graphic Designer
Review & Approval	Revise based on NDOT input	1 week	Editorial Manager + NDOT
Delivery	Provide print- and web-ready formats	By Q3	EditorialManager

#### 4. Pooled Fund Travel Reimbursement Coordination

Task	Description	Timeline	Responsible Parties
Setup & Tracking	Create tracking system for up to 30 states	At contract start	Project Manager
Reimbursement Review	Verify documentation and compliance	Ongoing	Editorial Manager
Communication	Liaise with participants on missing/incorrect submissions	Ongoing	Editorial Manager
Invoicing	Submit consolidated invoices to NDOT	Monthly or per event	Project Manager

#### Ongoing Communication & Quality Assurance

Activity	Description	Frequency	Responsible Parties
NDOT Check-ins	Progress updates and deliverable planning	Monthly or as needed	Project Manager
Internal QA Reviews	Ensure editorial, design, and logistical accuracy	Before all submissions	Editorial Manager
Project Documentation	Maintain detailed records of tasks and communications	Ongoing	Project Coordinator

This work plan is flexible and can be adjusted based on NDOT's evolving needs and project priorities. We are committed to delivering all components on schedule, within scope, and to the highest quality standards.

## Deliverables and Due Dates

Deliverable	Description	Estimated Due Dates	Frequency
<b>Research Summary #1</b>	4-page summary with visuals	March	Annual
<b>Research Summary #2</b>	4-page summary with visuals	June	Annual
<b>Research Summary #3</b>	4-page summary with visuals	September	Annual
<b>Research Summary #4</b>	4-page summary with visuals	December	Annual
<b>News Polls (1–10)</b>	500-word articles with graphics	January, February, March, April, May, June, August, September, October, November	Monthly (10 total/year)
<b>Program Fact Sheet</b>	Double-sided summary of SPR and Pooled Fund activities	July	Annual
<b>Travel Reimbursement Setup</b>	System setup for managing 30-state coordination	January	Annual (initial setup)
<b>Monthly Reimbursement Coordination</b>	Review, compliance check, and NDOT invoicing	End of each month	Monthly
<b>Monthly Progress Reports / Check-ins</b>	Updates on deliverables and logistics coordination	Last Friday of each month	Monthly

Notes:

- Due dates are flexible based on NDOT's scheduling needs.
- Deliverables will be reviewed with NDOT prior to finalization, allowing time for feedback and revisions.
- Emergency or expedited timelines can be accommodated when needed, especially for news poll turnaround or pooled fund travel changes.

## Acceptance of Terms and Conditions

Accept All Terms and Conditions Within Section as Written (Initial)	Exceptions Taken to Terms and Conditions Within Section as Written (Initial)	Exceptions: (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
SL		

## Exceptions Taken to Terms and Conditions

Accept All Terms and Conditions Within Section as Written (Initial)	Exceptions Taken to Terms and Conditions Within Section as Written (Initial)	Exceptions: (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
	No Exceptions SL	

## Acceptance of Vendor Duties

Accept All Vendor Duties Within Section as Written (Initial)	Exceptions Taken to Vendor Duties Within Section as Written (Initial)	Exceptions: (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
SL		

## Exceptions Taken to Vendor Duties

Accept All Vendor Duties Within Section as Written (Initial)	Exceptions Taken to Vendor Duties Within Section as Written (Initial)	Exceptions: (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
	No Exceptions SL	

## Appendix A: Work Samples

The following table summarizes submitted work samples that demonstrate Schatz’s qualifications for the Nebraska Department of Transportation (NDOT) Research Program Outreach and Administrative Assistance contract. Each sample highlights relevant experience aligned with NDOT’s scope of work and the proposal’s key win themes.

Sample #	Deliverable Type	Title / Description	Client / Program	Relevance to NDOT Scope
A-1	Technical Summary	FHWA EAR Program – Research Summary Sample	FHWA–EAR Program	Mirrors NDOT’s research summary requirement
A-2	News Poll Equivalent	<i>Public Roads</i> “Along the Road” Column – News Poll Equivalent	FHWA – <i>Public Roads</i> Magazine	Equivalent format and tone to NDOT’s requested news polls
A-3	TPF Program Fact Sheet	TPF Program- Fact Sheet Sample	FHWA – TPF Program	Matches NDOT’s SPR fact sheet deliverable
A-4	Travel Coordination Overview	HUD Travel Coordination Overview – Multi-State Reimbursement Example	HUD – Office of Policy Development and Research	Demonstrates experience in multi-agency event coordination
A-5	State DOT Research Report	VDOT Research Report – Recycled Plastic Modified Asphalt Case Study	VDOT	Demonstrates Schatz’s state DOT readiness and editorial support for complex technical research

### Appendix A-1: FHWA EAR Program – Research Summary Sample

*Integrated Data Collection Method for Tracking Freight Movement*  
[\[View full summary PDF\]](#)

This FHWA EAR research summary demonstrates Schatz’s ability to synthesize complex research findings into clear, accessible content. It includes visuals, plain language, and compliance with federal editorial and accessibility standards—directly aligned with NDOT’s requested research summary deliverables.

## Appendix A-2: Public Roads “Along the Road” Column – News Poll Equivalent

This “Along the Roads” column for FHWA’s *Public Roads* magazine mirrors the format, tone, and purpose of NDOT’s proposed news polls. Each column delivers a timely research or program update in a short, plain-language format (typically ~400–500 words), with accompanying visuals and links to more information.



## Appendix A-3: TPF Program- Fact Sheet Sample

This two-page fact sheet highlights program-level activity, funding use, and pooled fund outcomes. It is designed using Adobe Creative Suite, with layout and contrast optimized for stakeholder communication, accessibility, and public transparency, in line with NDOT's fact sheet deliverable. The factsheet can be formatted for print or digital use per NDOT specifications.



## Appendix A-4: HUD Travel Coordination Overview – Multi-State Reimbursement Example

The example on the following page outlines Schatz’s work planning, coordinating, and reimbursing travel for HUD’s national Innovation in Affordable Housing competition with public housing agencies (PHAs). It demonstrates our ability to manage multi-agency logistics, negotiate hotel blocks, collect documentation, and process federally funded travel reimbursements—directly aligned with NDOT’s needs for pooled fund travel facilitation and transparent, policy-compliant reimbursements.

## **HUD PD&R Innovation in Affordable Housing Student Design and Planning Competition (IAH) Travel Information:**

**Arranging and Managing Site Visits:** In mid-March of each competition year, the four teams the jury selected as finalists visited the site of the affordable housing problem to refine their submissions further. The PHA served as site visit host, inviting elected local government officials, city and county planners, and other project partners to attend and provide presentations so that the students could gain additional insight into the development and construction of affordable housing in the site's city.

In preparation for the site visits, Schatz worked with PHAs to determine locations for PHA offices and the proposed development site. Schatz selected hotels in close proximity to both and negotiated a block of rooms for a reduced rate.

Schatz worked with PHAs on preparations for the visit, including finalizing the agenda, obtaining information on areas of interest around the hotel and proposed development site, and providing the teams with any other important information.

The 2020 and 2022–24 site visits were held on site at the PHA offices, with the 2021 site visit held virtually for two days because of the COVID-19 pandemic.

**Planning and Coordinating Travel to and from Site Visit:** Schatz worked with the final four teams to determine the two members from each team that would be using government-funded travel (maximum of two per team) and then gathered information from those team members to book their hotel rooms. Schatz negotiated with local hotels for a block of rooms for a reduced rate. After each site visit, Schatz collected travel receipts from team members using government-funded travel for reimbursement. Schatz representatives attended each site visit to ensure everything ran smoothly from the beginning to the end.

**Arranging and Managing the Final Presentations and Awards Ceremony Event:** The IAH Final Presentations and Award Ceremony, the final event, was held in the Brooke-Mondale Auditorium of the Robert C. Weaver Federal Building at HUD Headquarters in Washington, D.C., in 2023 and 2024. Due to COVID-19-related travel restrictions and health concerns during the 2020–22 competition years, the event was held virtually on the Zoom webinar platform.

**Planning and Coordinating Travel to and from Final Presentations Event:** In preparation for each of the in-person final presentation events, Schatz selected hotels in close proximity to HUD Headquarters and negotiated a block of rooms at a reduced rate. Schatz worked with the final four teams to determine which two members from each team would be using government-funded travel (maximum of two per team) and then gathered information from those team members to book their hotel rooms. Similarly, Schatz worked with the competition jurors to arrange hotel rooms, flights, and ground transportation.



## Additional Reimbursement Funds Experience

### Department of Housing and Urban Development (HUD) Student Planning and Design Competition

Schatz successfully managed end-to-end travel planning and reimbursement for a multi-team site visit initiative. We coordinated travel for finalists in a government-funded program, working closely with each team to identify up to two members eligible for reimbursable travel under program guidelines. Our responsibilities included:

- Gathering travel details from participating team members;
- Booking hotel accommodations on their behalf;
- Negotiating reduced group rates by securing hotel room blocks;
- Attending site visits to ensure smooth logistics and provide on-site support;
- Collecting and organizing travel receipts from participants following each visit;
- Submitting reimbursement documentation in alignment with program requirements.

All reimbursable expenses were tracked and processed according to established funding limitations, ensuring compliance and accountability. Our hands-on approach and proactive coordination helped streamline the process for all parties and ensured accurate and timely reimbursement for each traveler.

### Air Mobility Command (AMC) *The Mobility Forum* (TMF)

As part of our standard process, we begin by gathering assignment details from the client, followed by conducting in-depth research to estimate the full cost of travel. This includes transportation to and from the airport, flight costs, hotel rates, per diem meal allowances, and car rental expenses. Based on this research, we prepare a comprehensive travel expense breakdown in a structured Excel spreadsheet, which is then submitted to the client for review and approval.

Upon approval, we coordinate with the client's contracting or finance department to receive the necessary funds. Our finance team tracks and processes the received funds efficiently, ensuring readiness to support the assignment.

### Armed Forces Entertainment (AFE)

We currently provide travel reimbursement coordination for videographers supporting the Armed Forces Entertainment (AFE) during on-site tours and events. The video production team is required to retain receipts for all travel-related expenses, including airfare, lodging, meals, and local transportation. These receipts are submitted to us following the assignment. We compile and review all documentation to ensure completeness and accuracy before submitting the expenses to the client for reimbursement.

To maintain financial transparency and accountability, travel costs are tracked against a dedicated portion of the project budget specifically allocated for travel. This allows us to clearly distinguish travel-related expenses from other project costs and enables the client to monitor travel spending in real time.



## Appendix A-5: VDOT Research Report – Recycled Plastic Modified Asphalt Case Study

Schatz provided editorial support for this report, ensuring clarity, technical consistency, and alignment with VDOT communication standards. The sample demonstrates Schatz's experience supporting complex, state-level transportation research publications.

### Excerpt:

“The purpose of this study was to assess recycled plastic-modified (RPM) asphalt mixtures field trials constructed in Virginia. This study documented and evaluated the constructability and laboratory performance of two plant-produced RPM mixtures compared with the Virginia Department of Transportation (VDOT) typical D and E surface mixtures as reference mixtures... The study recommends that VDOT consider allowing the use of RPM surface mixtures as another alternative for surface mixtures with D designation based on the laboratory performance of corresponding asphalt mixtures.”

**Link to full report:** <https://vtrc.virginia.gov/media/vtrc/vtrc-pdf/vtrc-pdf/26-R02.pdf>

## Appendix B - Resumes of Key Personnel

### JILL MCANINCH – PROJECT MANAGER

#### 20 Years of Experience

Ms. McAninch is an accomplished project manager and marketing specialist with 18 years of experience. She oversees the production of audiovisual and print materials, enhances outreach and communications messages, provides meeting transcripts, and manages marketing campaigns. She manages client expectations, analyzes qualitative and quantitative research data, and delivers effective public outreach. She manages budgets, including reimbursement processes across multi-state initiatives. She has hands-on experience ensuring compliance with federal and local requirements while coordinating logistics and financial tracking for complex outreach programs.

#### Key Skill Areas

- Project Management
- Strategic Communications Planning
- Market Research Analysis
- Campaign Tracking, Analysis, and Evaluation
- Section 508 Compliance
- Multimedia Campaign Management
- Knowledge and Information Management
- Progress Reporting and Quality Control

#### Schatz Strategy Group, 2014 to present

##### *National Highway Traffic Safety Administration (NHTSA), Region 6*

Ms. McAninch served as the Project Manager for a media support services contract with NHTSA's Region 6. This included providing public outreach and education efforts to support seat belt, impaired driving, and tribal outreach programs, as well as other priority highway safety programs. To support NHTSA Region 6 in these efforts, she provided social media training to Region 6 partners, attended and presented on effective social media outreach at the Texas Traffic Safety Summit and at the Region 6 annual partners meeting.

Ms. McAninch worked with NHTSA Region 6 Program Managers to develop and deploy a series of three webinars held over three months called "Strategies for a Safer Texas." The webinars targeted traditional and non-traditional highway safety partners, presenting strategies to make Texas roadways safer after a spike in traffic-related fatalities in Texas during 2021 and 2022. To support tribal outreach efforts, Ms. McAninch has provided event support at the Gathering of Nations Pow-Wow (the nation's largest pow-wow), organized and managed a tribal photo shoot, and worked with the Schatz graphic design team to develop and provide tribal outreach materials for special events, including multiple retractable banners, fact sheets, and postcards.

### ***U.S. Department of Housing and Urban Development (HUD) Innovation in Affordable Housing (IAH) Student Design and Planning Competition***

As Project Manager for this contract, Ms. McAninch served the IAH competition for five years as the primary liaison between HUD, competition teams, jurors, and the partnering Public Housing Authority (PHA). She ensured that all stakeholders remained informed about competition developments and key events, responded to questions, and provided feedback as needed.

She managed all aspects of the annual competition, including the development of judging criteria and scoring rubrics, compilation of winners and honorable mentions based on juror scores, and collaboration with HUD and the PHA to develop each year's in-depth housing issue. Ms. McAninch supported HUD in updating competition guidelines, eligibility criteria, and design requirements. She also led the creation and execution of marketing and outreach strategies to attract students from diverse backgrounds, maintained Section 508-compliant website content, and addressed inquiries from students and jurors.

Additionally, she organized and oversaw finalist site visits, student presentations, and the awards ceremony held each spring at HUD headquarters in Washington, D.C. At the conclusion of each competition cycle, she coordinated prize distribution, issued thank-you letters to PHAs, jurors, and participants, and produced a final report summarizing activities, deliverables, and recommendations for future competitions.

To manage client expectations, Ms. McAninch ensured that the annual outreach plan met HUD's demographic and socio-economic targets and reached institutions nationwide. She also handled all logistics for travel—including flights, accommodations, agendas, and local transportation—and recruited and coordinated jurors. Her responsibilities included monitoring project timelines and maintaining regular communication with teams and advisors to ensure timely submissions.

Her role required coordinating travel reimbursements, lodging, and prize disbursements across multiple universities and housing authorities in various states, ensuring compliance with federal and institutional requirements and timely processing.

### ***U.S. Department of State (DoS), Bureau of East Asian and Pacific Affairs Office of Public Diplomacy***

Ms. McAninch served as the Marketing Specialist for an international marketing and branding campaign focusing on the Freely Associated States (FAS) – the Republic of Palau, Federated States of Micronesia, and the Republic of the Marshall Islands. She supervised and assisted with the market research phase of the project using both quantitative and qualitative research instruments to determine each population's baseline awareness of U.S. assistance in their country and their primary ways of receiving information. After the research phase, she developed the campaign's communications, outreach and branding plan based on an analysis of the research. During the planning phase, she worked with the Schatz graphic design and multimedia team to develop the branding strategy and creative collateral

pieces, including a series of short videos, to be distributed throughout the FAS to support the plan.

### ***U.S. Department of Justice, Foreign Claims Settlement Commission (FCSC)***

As the Marketing Specialist for a media advertising contract with the FCSC, Ms. McAninch developed a marketing and outreach plan to inform citizens of Guam of a settlement claim they might be entitled to. She produced public service announcements (PSAs) for publication in newspapers, radio, and television in Guam. Once the PSAs were produced, she planned, selected, and placed them in broadcast and print media throughout Guam. In support of this contract, Ms. McAninch researched the best outlets to place the media and negotiated rates with media outlets, ultimately choosing the best media mix to achieve maximum return on investment for the government. Ms. McAninch managed the production and quick turnaround of the radio and television PSAs, completing production of both within seven days.

### **Awards**

- 2019 APEX Award of Excellence, One-of-a-Kind Publication – Health and Medical Publications for the Army National Guard – Guard Your Health #ClassIRecipes Cookbook
- 2018 Gold MARCOM Award for the DOS FAS international marketing and branding campaign in Strategic Communication, Marketing/Promotion Campaign, Branding.
- 2016 THOTH Bronze Anvil for the #WarriorReady Workout Videos in Social Media: Video.
- 2016 Award of Distinction Videographer Awards for Tanana Trails video, for Fort Wainwright, AK in the Government Category.

### **Education and Training**

- Bachelor of Science in Design, Housing and Merchandising
- Training Course: Editing and Proofreading Business Documents, 2017

### **References**

- Sheree Lewis  
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- Lauren Fosnot  
315 Parkwood Dr, Lakewood Village, TX75068  
(580) 628-1721

## ALLISON SIMMONS-JACOBI – EDITORIAL MANAGER

### 30 Years of Experience

Ms. Simmons-Jacobi has 30 years of experience specializing in transportation and energy communications. She leads teams to develop public-facing content for products and websites. She continually focuses on improving client–customer relations; advancing public-facing client programs, projects, and initiatives; and providing publication management and editorial expertise, with an eye for fine details and design enhancement opportunities.

### Key Skill Areas

- Team Building
- Budget Development and Management
- Customer Service
- Vendor Relationships
- Content Creation
- Editing
- Client Relationships
- Problem-solving

### Relevant Schatz Experience, March 2021 to present

#### *Federal Highway Administration (FHWA) Turner-Fairbank Highway Research Center, Project Manager and Technical Editor*

As project manager of *Public Roads* magazine and a publications technical editor, Ms. Simmons-Jacobi supports FHWA in developing public-facing products that advance agency goals, align with agency brand identity, and promote key agency programs and initiatives. Her physics background and previous engineering experience with the New York State Department of Transportation provide her with an advanced understanding of structures, materials, highway design, and planning critical to her contract roles, making her an asset to the Schatz team. Her diverse background and experience enable her to offer strategic and design guidance, editorial mentorship, and content development recommendations. Under her leadership, *Public Roads* magazine grew its digital subscribers by more than 1,000 percent in approximately three years.

#### *U.S. Small Business Administration National Women’s Business Council (NWBC)*

Ms. Simmons-Jacobi has served as project manager of the NWBC’s annual reports since 2023. Her understanding of the publication process, content development, and design and website development enables her to maintain seamless communication flow, adhere to tight client deadlines, and meet rapid-fire turnaround times. She was instrumental in establishing client protocols and team structure, and she guided the team in launching the reports online and releasing print on time.

#### *U.S. Department of the Interior National Park Service (NPS) ArcGIS StoryMaps*

As project manager, Ms. Simmons-Jacobi guided the editorial and design team in developing ArcGIS StoryMaps for two NPS trails: the Trail of Tears and the California Trail. Applying her trained eye for detail—gleaned from experience in the fields of science,

engineering, and journalism—Ms. Simmons-Jacobi managed all content development and coordinated design development and acquisition with the project designer for the first-ever NPS children-based ArcGIS StoryMaps project. As a published children’s book author and former resident of the Franklin D. Roosevelt Historic Site in Hyde Park, New York, she used her personal history to help create an exciting learning experience for a third-to-fifth-grade target audience.

#### ***U.S. Department of Agriculture (USDA)***

Ms. Simmons-Jacobi provides senior-level strategic and design support for this client, helping the project manager provide superior quality products and customer service for the USDA Grand Forks Human Nutrition Research Center in North Dakota. Ms. Simmons-Jacobi is a key player in the development of outreach efforts for the University of North Dakota, which includes posters, flyers, other collateral, study participation, and partnership opportunities.

#### ***U.S. Department of State (DOS)***

Ms. Simmons-Jacobi served as project manager of the DOS’s Agency Financial Report in the initial contract year. She tapped into her organizational skills and publication demand understanding to ensure constant and timely communication flow and adherence to tight client deadlines and rapid-fire turnaround times, all while supporting the design staff with content direction and editorial support. And she was instrumental in establishing initial client protocols and team structure.

#### **Other Relevant Experience**

##### ***Project Manager and Budget Strategist, Arch Street Communications, 2011 to 2021***

Ms. Simmons-Jacobi completed full-cycle project management—from full-scale proposal development to contract initiation and completion. She performed content development and editorial services for client publications, technical reports, websites, collateral, marketing campaigns, advertisements, and internal communications and presentations. She conducted budget analysis and development and provided staff supervision and mentoring. Her clients included FHWA (*Public Roads* magazine), U.S. Department of Transportation John A. Volpe National Transportation Systems Center (Volpe Center), New York State Department of Transportation, Connecticut Department of Transportation, New York Power Authority, and Advanced Power NA, Inc., (Cricket Valley Energy Center).

##### ***Technical Writer (Contractor, part-time), STRATAC Marketing, 2020 to Present***

As a part-time, on-call technical-writing and content support for a strategic and tactical marketing firm, Ms. Simmons-Jacobi completed voice development and execution for senior-level staff. She also worked on blog and article development, content curation, and e-book creation for the cybersecurity, finance technology, and mortgage software industries. And she provided internal firm communication support.

***Senior Engineering Technician, New York State Department of Transportation,  
2008 to 2010***

Ms. Simmons-Jacobi advanced quickly from being a highway design group member to the positions of acting public information officer, planning department data analyst, and regional primavera administrator. Additionally, she developed design reports, computer-aided-design drawings, right-of-way maps, and project estimates. And she maintained records and data for projects in the State's then \$750-million 5- and 10-year capital programs for highway, bridge, and transit projects, including extensive data and cost analyses and reviews of projects sent out for bid.

***Account Manager and Cargo Claims and Security Manager, Sovereign Logistics,  
2004 to 2007***

Ms. Simmons-Jacobi supported an international freight-forwarding company with enhanced supply chain security, boosted sales by expanding into Asian markets, and improved client-vendor relations via on-site visits and team building in Peru, Brazil, the Dominican Republic, and stateside. She conducted day-to-day account management of United States-based clients and foreign vendors in Asia, Central and South America, and Turkey—from product shipment pickup to delivery.

***Copy Editor, 1995 to 2001***

As copy editor and page designer at this daily newspaper, Ms. Simmons-Jacobi focused on front-page planning and assisted in story and art selection and content direction for reporters, graphic designers, and other staff editors. She was a fitness columnist, which included researching and writing. And she designed and copyedited two award-winning New Millennium sections, including “Water, Earth and Air” (1999), which was included in the Federal Government's National Oceanic and Atmospheric Administration official review of the Hudson River Estuary Program.

**Education and Training**

Bachelor of Science in physics, math, and English; College of New Rochelle, 1992

Public Trust Security Clearance, Moderate Risk, 2015–present

**References**

- TaMara McCrae  
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- Dan Shine  
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## MARY E. LEE - EDITORIAL MANAGER AND TECHNICAL WRITER/EDITOR

### 27 Years of Experience

Ms. Lee has 27 years of experience in managing process flow and editing documents for the U.S. Department of Defense (DoD) and U.S. Department of Housing and Urban Development (HUD). She completes editing tasks by following multiple style guides. Ms. Lee uses her interpersonal skills to develop teams that proactively create and prepare desired content for the intended audiences.

### Key Skill Areas

- Microsoft Office
- Multiple Style Guides
- Adobe Creative Suite
- Program Management
- Bilingual (English and Spanish)
- Top Secret Clearance, 2009–14

### Relevant Experience

#### *Technical Editor, Schatz Publishing, 2022 to Present*

Ms. Lee manages the Virginia Department of Transportation (VDOT) contract, working with VDOT management to edit and produce VDOT research reports and accompanying documents for publication while upholding VDOT publication standards and style.

Working on the U.S. Department of Housing and Urban Development contract, Ms. Lee edits articles for *Cityscape* journal, maintaining consistency among articles and paying attention to detail on tables and graphs. She also edits National Housing Market Summaries, Comprehensive Housing Market Analyses, Housing Market Profiles, Regional Reports, and Housing Market Indicators with strict deadlines, editing to at least 98-percent accuracy. When editing these documents, she applies the Office of Policy Development and Research (PD&R) and Government Publishing Office (GPO) guidelines. She tracks assignments in Basecamp.

In addition, Ms. Lee edits reports and documents for the Federal Highway Administration and U.S. Fish and Wildlife Service and articles for *The Mobility Forum* magazine as needed. She also edits Ginnie Mae press releases, speeches, and reports. She completed training with the 508 Institute, enabling her to write alternative text for U.S. Fish and Wildlife Service documents.

Ms. Lee develops and edits various types of technical and administrative publications, such as reports, journals, briefs, newsletters, and other publications. She organizes the material and completes assignments, ensuring that the clarity, conciseness, and style are appropriate. She also copyedits Spanish-language documents as needed.

She completed the 508 Institute for writing alternative text course for Government documents. Ms. Lee develops and edits various technical and administrative publications such as reports, journals, briefs, and newsletters. She organizes the material, completes

assignments, and ensures appropriate clarity, conciseness, and style. Ms. Lee also copyedited Spanish-language documents.

### **Other Relevant Experience**

#### ***Editor, HR Communications, 2016 to 2018***

Ms. Lee edited articles for the *Cityscape* journal. She prepared HUD reports for publication per PD&R and GPO style guides. She edited articles for the *Tree Planters' Notes* journal.

#### ***Senior Editor and Program Manager, The Creative Group, 2014 to 2016***

Ms. Lee edited certification materials and reports, maintaining editorial standards. She managed manuscript submissions for the *Journal of Dental Education* and edited monthly newsletters. Her expertise and understanding were evident whether she followed *The Associated Press Stylebook* or the *AMA Manual of Style* or *The Chicago Manual of Style* when producing documents. And she facilitated meetings with subject matter experts to ensure content accuracy.

#### ***Editor and Production Manager, Chairman of the Joint Chiefs of Staff, 2009 to 2014***

Ms. Lee edited grammar, style, and formatting with spot-on accuracy and met timeliness for daily production requirements and deadlines involving the CJCS Brief. She attended daily production meetings, coordinated with authors to incorporate substantive revisions, and researched and integrated information to ensure product consistency. Ms. Lee collaborated with graphic designers to develop maps, charts, and tables in support of accompanying text and for enhancement of topics, reviewing and editing graphics for incorporation into final products. She managed production topics to meet the interests of senior-level policymakers and DoD leadership. Ms. Lee also planned, prepared, researched, wrote, reviewed, edited, integrated, and published studies and reports. She coordinated, monitored, and integrated information from available sources while ensuring timely, comprehensive, and accurate responses to assigned tasks. She identified significant trends and proposed new analytical projects to alert decision-makers to new developments, providing input for policymakers on key trends. Ms. Lee represented the agency's position to senior policymakers in presentations.

#### ***Data Analyst, AE Strategies, 2008***

Ms. Lee supported implementing the DoD's National Security Personnel System (NSPS). She assisted in the operation of pay pools by completing all NSPS-related tasks during the year-end pay cycle, including data analysis at each stage of the pay pool process.

#### ***Study Abroad Advisor, Miami Dade College Office of International Education, 2006 to 2007***

Ms. Lee promoted study abroad programs during education fairs, open houses, and other information sessions, resulting in a 50-percent increase in student enrollment. She worked closely with the program manager to ensure program quality and improvement by reviewing

student evaluations and program assessments. She served as liaison between U.S. colleges and host institutions abroad to transfer credits received abroad into the U.S. college grading system. She supported the program budget by preparing invoices and generating payment vouchers. She coordinated cultural activities and lodging arrangements for international visitors. She demonstrated the ability to work proficiently in a team environment by coordinating with students and faculty members to attain projected goals.

### ***English Teacher, Berlitz International, San Juan, Puerto Rico, 1997 to 2000***

Ms. Lee taught conversational English as a Second Language to non-English-speaking students by using knowledge of Spanish to interpret and instruct lessons. She monitored students' progress and met individual student needs to maximize learning by recognizing and working with students' various learning styles and personalities. She issued grades and maintained student records.

### **Education**

- Master of Arts in international Studies, Old Dominion University, 2005
- Study Abroad, Programa de Visitas Educacionais, Salvador de Bahía, Brazil, 2004
- Bachelor of Arts in English and Spanish literature, Norfolk State University, 2002
- Study Abroad, Universidad Nacional Pedro Henríquez Ureña, Dominican Republic, 1996

### **Publication**

- “Race Consciousness in the Dominican Republic: A Comparison of Three Dominican Poets—Past, Present, and Future.” *CLA Journal* 55(2):191–208.

### **References**

- Rick Harroun  
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- Ann Thompson  
2016 Glen Ross Road, Silver Spring, MD 20910  
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## CHRIS MCCOY - TECHNICAL WRITER AND EDITOR

### 16 Years of Experience

Mr. McCoy is a skilled and detail-oriented editor and writer with more than 16 years of experience in various subjects, publication types, and editing styles for public- and private-sector clientele. He is an expert at translating complex technical information into compelling, easily digestible language for target audiences. He has written web articles for defense.gov, health.mil, and various Federal Highway Administration (FHWA) websites.

### Key Skill Areas

- Technical Writing and Editing
- Marketing and Communications Writing
- GPO Style
- Associated Press Style
- Chicago Manual Style
- APA Style
- Plain Language Guidelines
- Research Databases
- Intermediate-Level German
- SharePoint
- Adobe Acrobat
- Federal Acquisition Regulations

### Relevant Schatz Experience: 2021 to Present

#### *Technical Editor, FHWA*

Mr. McCoy performs technical editing, quality control of data and content, and documentation, recordkeeping, and archiving of written assets. He writes effective training materials that contribute to training video storyboards and captions for staff outreach training. Mr. McCoy ghostwrites copy for the FHWA website while coordinating processes and procedures for specific projects with company and Federal staff. He manipulates images in the Paint 3D graphic application, cropping and resizing images when needed. Mr. McCoy edits assigned documents and the accompanying alternative text. He reviews documents for grammar and style guide adherence and cross-references data. He develops references and resource lists and reviews permissions tables and editorial changes.

#### *Schatz Bid and Proposal Writer*

Mr. McCoy reviews and analyzes solicitation documents and creates compliance documentation for Schatz's proposals. He drafts proposal content based on Government agency requests. His proposal development consists of expressing the technical processes that Schatz can provide for Government agencies. Every proposal requires careful analysis, research, and planning, and after drafting proposals, Mr. McCoy proofreads and edits documents while ensuring adherence to all instructions.

### Relevant Commercial Experience

#### *Writer and Editor, Greenleaf Integrative, 2020 to 2021*

Mr. McCoy performed storytelling via fictional short stories to illustrate abstract concepts. A large international development firm recirculated one story within its headquarters and to its teams in support of U.S. Agency for International Development missions worldwide and the

U.S. Government-wide Feed the Future initiative covering 14 U.S. Government departments and agencies. He wrote blog posts and performed ghostwriting and occasional topic research services while copyediting and providing content clarity editing services for the firm's blog and other assets. He also wrote and edited biographies of key personnel for the firm's website and proposals.

#### ***Volunteer Editorial Consultant, SOFSPACE, 2016 to 2018***

During the Russia–Ukraine war, Mr. McCoy interviewed Ukraine's equivalent of the U.S. secretary of state alongside several well-known journalists at the 2017 Halifax International Security Forum held in Halifax, Canada. He also discussed the direction of editorial content from weekly to biweekly with the publisher of an independent website dedicated to the U.S. Army Special Forces community he represented at the forum.

#### ***Editor and Manager, KMI Media Group, 2012 to 2015***

Mr. McCoy managed three targeted international glossy-print magazines distributed to a sophisticated audience of admirals and generals, the U.S. Congress, defense and medical industry C-suite executives, and U.S. ambassadors. He also wrote over 200 published feature articles and op-eds and edited 600 others while performing continuous market research on technology for the three defense acquisitions publications. In a deadline-driven environment, he created editorial calendars, networked at conferences and trade shows, interviewed subject matter experts, wrote digital newsletters, tweeted, blogged, coordinated production with other departments, supervised 14 freelance writers for nearly three years, and published exclusive interviews with assistant secretaries of defense and four-star commanders like Adm. William H. McRaven and Gen. Joseph L. Votel.

#### **Education and Training**

- Master of Arts in history, James Madison University
- Bachelor of Arts in history, James Madison University

#### **References**

- Allison Simmons-Jacobi  
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- Sarah Massuda  
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## CHRISTINE WALSH - TECHNICAL WRITER AND EDITOR

### 25 Years of Experience

Ms. Walsh has 25 years of experience as a self-directed and driven writer, editor, and communications specialist with comprehensive accomplishments to ensure success and achieve goals. She is known as an innovative thinker with strong communications and technology acumen. She has developed and seamlessly executed plans in complex organizations. She is recognized for maximizing performance by implementing powerful strategies via analysis of details to understand brand perception, target market, and consumer preferences. Her expertise includes budgets.

### Key Skill Areas

- Written Communication
- Effective Collaboration
- Proofreading and Copy-Editing
- Event Execution
- Problem-solving
- Webmaster Tools
- Google Analytics
- Adobe Creative Suite
- Microsoft Office Suite
- Social Media Marketing

### Schatz Strategy Group, 2021 to present

#### *Technical Editor, U.S. Department of Transportation Federal Highway Administration*

Ms. Walsh edits multichannel content, including print, web, email, and social media materials. She reviews documents for clarity, accuracy, and consistency in spelling, grammar, and style; adheres to style guides and client guidelines; and applies plain-language principles to ensure content is accessible and understandable. She manages editorial workflows, prioritizing multiple projects and adapting to changing deadlines in a fast-paced setting. She monitors, tracks, and helps implement feedback from legal and public affairs teams to ensure consistency across all products. Ms. Walsh uses such technologies as Microsoft Office Suite and Adobe Acrobat to streamline editorial workflows and maintain version control. She manages editors by assigning tasks and providing feedback to ensure high-quality content. She leads meetings with team members to contribute to team training, process improvements, and best practices in editing and collaborates with the members to achieve common goals and meet deadlines. She represents the client's editorial team at conferences and manages archives for the client.

### Relevant Commercial Experience

#### *Technical Editor and Proofreader, FASS, Inc., 2020 to 2021*

Ms. Walsh reviewed, marked, and corrected copy with regard to grammatical and typing errors for the association's monthly scientific journals, newsletters, and other projects. She proofread approved production copy against Word documents and according to style guides. She wrote press releases for journals featured individual research papers. She also handled all social media marketing duties, including designing graphics and postings.

### ***Writer and Editor, The News-Gazette, 2005 to 2020***

Ms. Walsh designed pages, wrote headlines, and copyedited newspapers and magazines. She reported and wrote special assignments. She reviewed, marked, and corrected copy for grammatical and typing errors, proofread approved production copy according to style guides, wrote press releases, and handled social media duties, including scheduling postings. She reported, wrote, and edited content; maintained websites; helped plan and execute community marketing events; laid out pages; and photographed news, features, and sports.

### ***Managing Editor, Herald Journal, 2004 to 2005***

Ms. Walsh designed pages, wrote headlines, and copyedited articles. She oversaw the editorial department on the evening shift. She reported and wrote special assignments. She reviewed, marked, and corrected copy for grammatical and typing errors and proofread approved production copy according to style guides.

### ***Editor, Newton County Enterprise, 1999 to 2004***

For *Newton County Enterprise*, Ms. Walsh directed reporters' and stringers' news-gathering efforts, analyzed news coverage to meet readership's expectations, and assisted the publisher in setting goals, budgeting, achieving expense reduction, and conducting management.

### ***Editor, The Fountain County Neighbor, 1997 to 1999***

Ms. Walsh directed reporters' and stringers' news-gathering efforts, analyzed news coverage to meet readership expectations, assisted the publisher in setting goals, budgeting, achieving expense reduction, and conducting management.

### **Education**

- Bachelor of Arts in literature and communications, Benedictine University

### **Awards**

- Best Spot News Photo, Best Coverage of Taxation, Best Niche Publication, Illinois Press Association
- Best News Photo and Best Short Story, Hoosier State Press Association

### **References**

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(217) 355-5602



## DAVID MCDONALD - GRAPHIC DESIGNER

### 22 Years of Experience

Mr. McDonald is a graphic designer. He started his professional journey as a concept design coordinator, graphic designer, and, eventually, concept designer. He collaborates with clientele to determine their objectives and translates the objectives into aesthetically pleasing designs. He is meticulous in his design technique, ensuring that it conforms to Section 508 compliance standards.

### Key Skill Areas

- Adobe Creative Suite
- Microsoft Office
- Database Management
- Office Administration
- Art and Design
- Nonprofit and Humanitarian Work
- Verbal and Written Communication Skills
- Program Development and Management
- Quality Control
- Section 508 Compliance
- 508-Compliant Template Design
- Website Design
- Accounting
- Donor Relations
- Fundraising
- Copy Editing
- Copy Writing
- Customer Service and Networking
- Organization and Time Management
- Graphic Design
- Basic Adobe Creative Suite
- Videography and Tutorial Videos

### Relevant Schatz Experience, 2018 to present

Mr. McDonald started out using his graphic design skills to create layout and design for various publications for the U.S. Department of Housing and Urban Development (HUD). Since then, he has taken on multiple additional projects such as graphic design for the Innovation in Affordable Housing Student Design and Planning Competition and the National Highway Traffic Safety Administration (NHTSA), quality control for Armed Forces Entertainment, backup support and coverage for the General Services Administration (GSA), layout and design and quality control for the Federal Highway Administration (FHWA), and learning about Section 508 and accessibility compliance to become a 508 graphic design specialist.

### *FHWA Turner-Fairbank Highway Research Center (TFHRC)*

Mr. McDonald provides formatting services and design and layout for various FHWA publications and reports, including TechBrief, Accelerating Market Readiness Fact Sheet, Long-Term Pavement Performance, *Fast Lane—Exploring Human Behavior* newsletter, and American Association of State Highway and Transportation Officials fact sheet. In addition, Mr. McDonald executes layout and design for the marketing and communications team (MarCom) division of FHWA for reports and publications such as the Exploratory Advanced Research (EAR) program, which includes workshop summary reports, program brochures,

and fact sheets. Mr. McDonald also created various templates and report covers for both the FHWA Publications and MarCom divisions. And he assists in color correction of images, graphs, and photos to meet 508 compliance requirements and standards for both Publications and MarCom.

### ***HUD Office of Policy Development and Research***

Mr. McDonald provides formatting services and design for various HUD publications and documents, including National Comprehensive Housing Market Analysis reports, regional reports, National Housing Market Summary and Data, Housing Market Profiles, National Housing Market Indicators reports, *Cityscape*, and ad hoc research studies and reports. Mr. McDonald ensures that all documents he produces meet the 98-percent-accuracy standards set by HUD. He formats and designs documents by using the template for the particular publication. Mr. McDonald uses data provided in Excel files to design the charts, graphs, and tables that appear in each report. And he finds an appropriate photograph to match a report's geographic area, as required by HUD.

### ***General Service Administration (GSA)***

For GSA, Mr. McDonald serves as backup by fulfilling design and layout duties requested as well as by updating InSite (GSA's website content management platform), which includes layout and design in Google Docs and Google Slides.

### ***The Mobility Forum***

Mr. McDonald has assisted with layout and design for articles for the magazine that provides a forum whereby military pilots can share experiences, recognize accomplishments, and keep up-to-date on information important to the Air Mobility Command community.

### ***U.S. Department of Agriculture (USDA)***

Mr. McDonald has provided concepts and design and layout for various USDA campaigns, including producing a flowchart for the Grand Forks Human Nutrition Research Center and a USDA Train Your Brain study postcard that is mailed nationally.

### ***NHTSA***

Assisting in the creation of social media images and graphics for multiple national and regional campaigns, Mr. McDonald creates content and layouts for print and digital use, develops layouts in compliance with established design standards, and contributes ideas during brainstorming sessions.

### ***HUD Innovation in Affordable Housing Student Design and Planning Competition***

For the HUD Innovation in Affordable Housing Student Design and Planning Competition, Mr. McDonald spearheaded a logo redesign for the competition. By applying his knowledge of HUD design standards, he developed a logo that could easily change color every year to

fit the previous year's brand strategy while making the logo easier to manipulate and fit in multiple types of layouts.

## **Relevant Commercial Experience**

### ***Children's Relief International, 2001 to 2018***

Mr. McDonald designed all newsletters, media, and fundraising materials as well as web development. He also oversaw the entire U.S. operations, which consisted of project management, database management, communication with donors, fundraising, financial management, and accounting.

### ***DaySpring Cards (Hallmark), 1996 to 2001***

Mr. McDonald designed the concept phase through the design phase. He digitally assembled products that included greeting cards, calendars, and booklets.

## **Education and Training**

Bachelor of Science in graphic design and multimedia, John Brown University and Oklahoma State University

## **References**

- Allison Simmons-Jacobi  
150 Grey Oaks Lane, Lexington, SC 29072  
(919) 243-0085
- Sarah Massuda  
2800 Quebec Street NW Apt. 936, Washington, DC 20008  
(443) 831-1376
- Brittany Derriso  
6300 Georgetown Pike, McLean, VA 22101  
(678) 209-3580

## CONTRACTUAL AGREEMENT FORM

### BIDDER MUST COMPLETE THE FOLLOWING

By signing this Contractual Agreement Form, the bidder guarantees compliance with the provisions stated in this solicitation and agrees to the terms and conditions unless otherwise indicated in writing and certifies that bidder is not owned by the Chinese Communist Party.

Per Nebraska's Transparency in Government Procurement Act, Neb. Rev Stat § 73-603, DAS is required to collect statistical information regarding the number of contracts awarded to Nebraska Vendors. This information is for statistical purposes only and will not be considered for contract award purposes.

\_\_\_\_ NEBRASKA VENDOR AFFIDAVIT: Bidder hereby attests that bidder is a Nebraska Vendor. "Nebraska Vendor" shall mean any bidder who has maintained a bona fide place of business and at least one employee within this state for at least the six (6) months immediately preceding the posting date of this Solicitation. All vendors who are not a Nebraska Vendor are considered Foreign Vendors under Neb. Rev Stat § 73-603 (c).

\_\_\_\_ I hereby certify that I am a Resident disabled veteran or business located in a designated enterprise zone in accordance with Neb. Rev. Stat. § 73-107 and wish to have preference, if applicable, considered in the award of this contract.

\_\_\_\_ I hereby certify that I am a blind person licensed by the Commission for the Blind & Visually Impaired in accordance with Neb. Rev. Stat. § 71-8611 and wish to have preference considered in the award of this contract.

### THIS FORM MUST BE SIGNED MANUALLY IN INK OR BY DOCUSIGN

COMPANY:	Schatz Publishing Group
ADDRESS:	11950 W. Highland Ave, Blackwell, OK 74631
PHONE:	(580) 628-4607
EMAIL:	Sheree.Lewis@schatzpublishing.com
BIDDER NAME & TITLE:	Sheree Lewis, Manager
SIGNATURE:	
DATE:	07/15/25

### VENDOR COMMUNICATION WITH THE STATE CONTACT INFORMATION (IF DIFFERENT FROM ABOVE)

NAME:	
TITLE:	
PHONE:	
EMAIL:	

# NEBRASKA DEPARTMENT OF TRANSPORTATION

## Cost Proposal Bid Sheet

### Request for Proposal Number R420-25

### Research Program Outreach and Administrative Assistance Services

Please indicate fixed hourly rate for each deliverable category. The deliverables will be paid as fixed payments upon completion and/or acceptance of projects. All costs necessary to satisfy the requirements of this RPF must be included in the pricing listed on this form. No invoice will be approved unless the associated deliverables have been approved by NDOT. Contractor will be paid based on actual amount of hours worked and travel reimbursement costs.

#### PRICING SUMMARY TABLE

Description		Estimated Annual Usage/Hours	Per Hour	Total Cost
1	<i>Research Summaries</i>	125	\$ 84.00	\$ 10,500.00
2	<i>News Polls</i>	25	\$ 82.00	\$ 2,050.00
3	<i>Program Fact Sheet</i>	30	\$ 85.00	\$ 2,550.00
4	<i>Administration Fees for Travel Reimbursement Process</i>	50	\$ 78.00	\$ 3,900.00
			<b>GRAND TOTAL</b>	<b>\$ 19,000.00</b>

Travel reimbursement costs will be paid with proper documentation including but not limited to:

1. Dates of services
2. Amount of reimbursement
3. Name of traveler for each reimbursement
4. Origin & Destination for each reimbursement
5. Administrative cost for each reimbursement
6. Service provided
7. Receipts for travel expense reimbursements (if applicable)
8. Mileage (if applicable)