

## TIPS FOR PROPOSAL WRITING

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Proposal writing is an art that requires considerable attention to detail and knowledge of recommended procedures. Each funding organization has its own formats and requirements: please take the time to research the funding organization and learn the criteria and policies they have in place.

The following are some tips to writing a proposal that I have gathered over the years. Do not consider these guidelines as the final 'say' on how to write a proposal, as the process is constantly changing. My recommendation is that you work closely with the funding organization, strive to keep that communication channel open and viable, and identify a few key people as proof readers and editors of your work.

### TITLE PAGE

1. Format specifications. Many RFP's include a template or required format for every section including title page, chapter headings, page numbering and appendix.
  - a. The proposal must look professional and neat, not cluttered.
  - b. Use one typeface throughout the document.
  - c. Do not add special effects, distracting designs or unnecessary color changes.
  - d. Do not use report covers, special bindings that will not impress the funding agency and may create the wrong image.
  
2. Contributor Signatures. Because many agencies require the signature of anyone involved in the development of the proposal including those collaborating from other organizations. Key people typically included are:
  - a. Executive Director or CEO
  - b. Chair of the Board of Directors/Trustees
  - c. Contract Officer or CFO
  - d. Department Head

Be certain to allot adequate space, type the name and title of each individual below the line for signature, and require each signer to also add the date of the signature. In a very few cases it may be necessary to have a notary authorize the signatures.

3. The Proposal Title. The words you chose should clearly and succinctly capture the theme and purpose of the proposal.
  - a. Eliminate unnecessary adjectives, connectors, or superlative terms presenting the more important, key words first. For example, *A Survey of the Impact of Reactive Behavior during Animal Training* is more effective when phrased as: *Animal Training Reactive Behavior Impact Survey*.
  - b. Titles should be kept to a single sentence. In situations requiring a two-part title, separate each part with a colon.

## PROJECT OVERVIEW

1. Present key facts. Similar to an Executive Summary, the Project Overview is designed for the reader who needs to quickly determine the content before scheduling the time to necessary to carefully study the content in detail. A flamboyant writing style with unnecessary description in the Project Overview may cause the entire proposal to be rejected. Highlight key facts without detail to engage and encourage the reader to want to invest additional time in the proposal.
  - a. Consider the Project Overview as a frame for the proposal. Apply the three-step adage: *"Tell them what you are going to do, do it, tell them what you did."*
  - b. Present the facts based on how the action or process will address the concerns of the funding organization. In 'selling' parlance, focus your efforts on introducing the benefits of the product or service rather than the more obvious features – it is how the service is applied that directly affects the outcome.
2. Write the Overview second. Many authors recommend creating the core of the proposal first, then prepare the overview, inserting it at the beginning, and finally write your conclusion.
  - a. After drafting the core of the proposal, submit it to any internal review committee for editing and refinement. If you do not have a committee, seek someone who is experienced to review the proposal at this early stage. In some cases, there is a member of the funding organization willing and available to assist you.
  - b. If you are collaborating with another organization, submit the core of the proposal and request that their benefits from the project success are clearly stated.
3. Avoid Rejection. Because funding organizations receive so many proposals, most have specific areas of weakness often in a form of a check-list that may be employed as they review your proposal. Typical areas considered include:

- a. Originality of idea
- b. Rationale for time/money investment
- c. Specificity of goal
- d. Confidence in Outcome
- e. Experience/ available resources
- f. ROI
- g. Personnel experience

## PROBLEM STATEMENT

Before you begin to write your Thesis Statement to define your problem, you must research the funding organization and the RFP and be certain the needs you have identified align with the stated needs and the Mission of the sponsoring organization. Once you have confirmed that your goals are complimentary and will enable the sponsoring organization to address an identified need, then you can begin to prepare your Thesis Statement.

1. Prepare a Thesis Statement. Similar to an elevator speech if spoken, the Thesis Statement for your proposal will clearly and succinctly describe your project goals in sixty words or less. It is the opening statement that provides enough detail to entice the reader to want to learn more. It will introduce or reference:
  - a. The issue or problems that must be studied
  - b. Why these problems are important
  - c. Other sources/programs consider these vital needs
2. Identify Your Experience. Include references, cite previous project and similar studies to prove that you know:
  - a. What has occurred – what body of knowledge you will tap as the foundation for your work.
  - b. What is happening in the field – what others are doing and how they are addressing the key issues of concern to the funding organization.
  - c. How you are prepared to address these issues and provide a valuable result.
3. Write professionally. Be careful to avoid abbreviations, jargon or unnecessary data while presenting any supporting information to explain your ability to address the topic.
  - a. Explain why you and your organization are uniquely qualified to address the issue such as location, uniquely trained staff, previous work in the field.
  - b. Emphasize how you will work as a 'partner' to the funding organization.
  - c. Provide any proof of your expertise such as previous study, survey, assessment, etc.
4. Express Your Confidence. Every sentence must indicate the value of your project and explain how it will provide sustainable value, such as:
  - a. Build on-going approach and knowledge base

- b. Capable of taking the best from previous initiatives by careful decision making and study
- c. Establish a new approach that is innovative and will serve as a reproducible model.
- d. Unite existing resources for collaborative long-term results

## GOALS AND OBJECTIVES

1. Difference between goals and objectives
  - a. Goals are the end results, presented in general terms as a vision and outcome of the effort and strategy.
  - b. Objectives are the measurable and specific tactics you will employ to achieve the goals and implement the strategies.
2. Measurement and time frame.
  - a. All goals and objectives should be presented in terms of how you will benchmark progress and determine points of completion.
  - b. Describe how you will assess your success and monitor the progress of the effort.
  - c. Identify quantifiable outcomes that will substantiate consistent effort toward goal.

## TARGET AUDIENCE

1. Define your audience.
  - a. What population segment do you intend to reach through this effort?
  - b. What is your prior experience with this group?
  - c. Is this group aware of your proposal and do they support the basic tenants of your plan?
2. What other organizations, groups, associations or agencies address the needs of this group and are they working with you in this effort?
3. How will the funding agency benefit from working with this target group?

## METHODOLOGY

1. Process to achieve objectives.
  - a. Explain in detail how the methods you propose will achieve the stated objectives
  - b. Address how any distractions, problems, needs or unexpected special interests will be handled.
2. Innovation and Value.
  - a. Identify how your methodology is innovative and will provide a unique process to achieve the desired goal.
  - b. Provide specific examples of the value you bring to this project and the significance of the results to the funding organization and the target population.

- c. Establish the sustainable benefits and long-term value of this initiative.
- 3. Collaboration.
  - a. Explain how the target population and any supporting agency will contribute to the project implementation.
  - b. Identify specific tasks and intended outcomes that will arise because of these connections.

## TEAM CREDENTIALS

1. People who form the core project team.
  - a. Identify the roles and responsibilities of the core team members, providing bios and brief personal statements from each describing their commitment to project success.
  - b. Describe how each person will function as part of a team to meet the stated objectives.
2. Stakeholders or Advisory Committees.
  - a. Describe how you will utilize experienced professional as advisors.
    - i. Provide an organization chart showing reporting relationship between project team and advisory group members
    - ii. Include brief background and bio on each member, highlighting previous experience similar to this project.
  - b. Advisors on a Steering Committee
    - i. Identify relationships between members and needed resources as well as long-term, on-going relationships after project completion.
    - ii. Detail specific role of members including length of time committed to project.

## RESOURCES

1. Community Involvement. Identify any cooperative relationships and name the people as well as organizations that have committed themselves to the immediate success and long-term continuance of the project after the program initiative has been completed.
2. Endorsements. Provide letter of reference or statements of support to confirm the commitment of others to project success.

## PROFESSIONAL CONTRIBUTORS

1. Paid Staff. Identify the Team members that will receive salary/financial support from the grant.
  - a. Explain how each person is particularly prepared and uniquely qualified for this role.
  - b. Describe how the individual will contribute to the team, the initiative, and overall project success.
2. Part-time Staff
  - a. Collaborative efforts benefit from employing staff from each contributing agency on a part-time basis.
  - b. Secure the support of the collaborating agencies before considering their staff to actively participate in the initiative.

## FACILITIES & EQUIPMENT

1. Site. Describe meeting rooms where the actual work will take place and materials stored.
2. Equipment. Prepare a list of equipment required and a cost of acquisition from an identified reliable source, as well as maintenance and supplies. Typical items often included:
  - a. Office supplies including paper, ink, pens, stationary
  - b. Duplicating, scanning and recording equipment
  - c. Computer and printer
  - d. Telephone with answer service
  - e. Desks, chairs, tables
3. Cell phones. Include only if cell phone will be supplied or costs reimbursed.
4. Contributions.
  - a. Seek out potential contributions of equipment and supplies prior to submitting the proposal.
  - b. Identify any gifts of location, supplies or services in terms of their financial value to the project.

## COMMUNICATIONS PLAN

1. Prepare a Communications Plan.
  - a. Identify communication outlets/sources to distribute information
  - b. Explain how you will receive updates of target audience needs and activity.
2. Describe communications products
  - a. Newsletter. Explain who will write the publication, how it will be distributed and projected costs.
  - b. Website. Explain who will create and maintain the site as well as projected costs.
  - c. Workshops or Conferences. Explain how you will gather together all groups and target audiences to discuss initiative contribute to results or disperse information gathered.

## IMPLEMENTATION SCHEDULE

A description of how you plan to implement this project should be included in the body of the proposal. Prepare a detailed description of the schedule to be inserted in the Appendices.

1. Prepare an Implementation Schedule
  - a. Event and proposed date of project start
  - b. Proposed dates to achieve benchmark objectives
  - c. Target date for project completion
2. Provide a description on how schedule will be maintained
  - a. Process to monitor performance
  - b. Role of advisors in day-to-day activities
3. Process to maintain two-way communication with funding organization

## BUDGET

An outline of the proposed budget should be included in the body of the proposal. Prepare a detailed description of the budget to be inserted in the Appendices

1. Prepare a detailed budget for each year of the project.
  - a. Enlist the support of financial experts to provide specific cost projections.
  - b. Involve others who have successfully submitted proposals to review your presentation.
  - c. Select specific categories to list your budget line-items
2. Consider a Gradient Budget. Projects that are implemented in phases would benefit from having different allocations of money available as each phase is addressed.
3. Trial Program. Offer to begin the project with minimal funding to establish expectations and provide opportunity to terminate the relationships if initiative proves inappropriate or misdirected.

## EVALUATION PLAN

A description of your proposed project evaluations plan should be included in the body of the proposal. Prepare a detailed description of the plan to be inserted in the Appendices

1. State how you will monitor project implementation.
  - a. Explain what surveys, questionnaires or data-gathering techniques you will employ at the end of the project to determine value of the initiative.
  - b. Describe how you will obtain feedback:
    - i. While the project is underway (formative) as you form your understanding
    - ii. At the end of the project (summative) at the conclusion of the project

2. Identify benchmarks for project implementation to assure that steps continue to align with project goals and Mission of funding organization.
  - a. Clearly show how all project objectives and methodology employed will meet stated objectives.
  - b. Indicate your concern for effectiveness of implementation, coordination of resources and commitment of all staff as well as target audience.
3. Express personal commitment of all staff to install a process of sustainable, on-going and lasting value to the target audience and funding organization.

### PROPOSAL APPENDICES

The appendix is where examples of materials, endorsements, and details that are not essential to understanding the proposal are included for review at the reader's opportunity.

1. Documents that provide detail on the methodology are often included in the appendix:
  - a. Communications Plan
  - b. Evaluation Plan
  - c. Implementation Schedule
2. Documents that support and confirm your ability to succeed
  - a. Letters of endorsement
  - b. Statements from supporting organizations
  - c. Confirmation of willingness to contribute time, materials or resources