Formatting Your Proposal:
The purpose of this resource is to explain the layout of a proposal and the information that is used in each section. The writing skills you will need to successfully complete this task are summarizing, describing, analyzing, explaining, synthesizing, and organizing.

Remember, proposals are meant to persuade and usually you will be persuading readers of three key issues: you understand their needs; you know what you are going to do and that you are capable; and that you are a professional and are responsible. The language you use will reflect confidence: don’t say I think, or I believe: Say, I will or I can.

Proposals—especially larger proposals (5 or more pages)—are divided into three parts: front matter, body, and back matter.

Organization: If the proposal is solicited, you should organize your proposal according to the Request for Proposal (RFP) but if it is unsolicited, you should follow the formatting that is generally accepted in your field. The below information will give you the basic outline and what information each area will provide.

Typography is important when creating your proposal. Take advantage of the ability you have to use bold, italics, and underlining. Create a heading for each section and with each section provide subheadings. For a guide on how to use typography successfully, refer to the resource: Typography. The key to successful typography is consistency and organization.

Front Matter: Contains all of the organization of the proposal. The front matter is the beginning of the document and has three elements: Cover or Transmittal Letter, Title Page, and Table of Contents. Even though the front matter is placed at the beginning of the proposal, it is the last section of the proposal that you will create.

Cover letter—or—transmittal letter: Usually three of four paragraphs. This document is formal and should be written in the formatting of a business letter or a memo.

- The first paragraph is used to express gratitude for the company allowing you the opportunity to submit your proposal, gratitude to any help from the company by way of research materials.
  1. Also, here would be a good place to remind the person or company that you have already had prior association with their company or what similar work you have accomplished.
- After the paragraph of gratitude, write a brief summary of the proposal’s recommendations. (Business writing begins with the ending. Put what you are going to do).
- End with the qualifications you have for this project.

Title Page—includes the title of the proposal, the date, the name and logo of the organization where it is being submitted, and your company name and logo. (This is an important part of the proposal). Some people will include a brief summary of the entire proposal in this section.

Table of Contents—the table of contents is typically used in large proposals and functions like all tables of contents—to guide the reader to a particular heading or page. The formatting is typical with the title of the heading or section followed by the page number.

List of Figures—you will use a list of figures if your proposal has six or more figures. Figures represent photos, pictorials, graphics, charts, tables, maps, and more. You should arrange your list by—figure number—and page number.
**Body:** the body is broken into four parts: the Summary, the Introduction, the Body, and the Conclusion.

*Summary:* The summary is designed to provide a few sentences on each of the major elements of your proposal. So it is here that you will define the problem, describe the program you are proposing, give a brief statement of your qualifications and experiences. You can include the budget and completion date as well.

If you are providing a proposal for an expert in the field along with someone who may not have as much information, you should provide an executive summary for the non-expert. The **Executive Summary**—can be in a memo formatting, if the proposal is small. Some organizations require strict adherence to a word or page limit; however, if there are no specifics for length, the length of a summary will be dependent upon the length of the proposal: obviously, the longer the proposal, the longer the summary.

The summary is an important element of the proposal because it provides a summary of the proposal. *On the first line,* you should have a clearly written statement of the proposal. Make your statement of purpose clear and near the beginning of the summary and again in the introduction: This proposal is requesting ___________ for the purpose of ___________. Or the purpose of this proposal is to ___________ in order to ___________.

Look at the summary as somewhat abstract-like. You are compressing all the important information from your proposal into the summary. You should at least include a line or two for each area of your proposal:

- What is the problem or what is the need in a sentence or two.
- What are you proposing to do about the problem or need? Provide a brief statement of your qualifications and experience.
- How much is this going to cost and the completion date.
- What are the outcomes—the deliverables. Deliverables are the final product.

*Introduction:* The introduction is a key element of the proposal. It assists the reader in understanding the proposal’s scope, context, and organization. It should emphasize the benefits for the audience.

The introduction should do the following:

1. Describe the problem or opportunity in specific monetary terms.
2. Describe the problem or opportunity and specifically propose activities that will end in a deliverable.
3. Describe the background of the problem. (Know your stuff. This all should have already been researched. This gives you an opportunity to showcase your knowledge).
4. Describe your sources. Your sources can be material from internal documents to published articles and books. When using sources, set up the quote, paraphrase, or summary by introducing it, following through with it, and then showing how it relates to your topic.
5. Describe the scope: what you are proposing to do and what you are not going to do. This is important for setting the stage for your deliverables.
6. Describe the organization of your proposal.
7. Describe and define the important terms or concepts.
8. Anticipate your reader’s questions.

**Body**—this is where the graphics are incorporated into the work. It is a good idea to use headings in this section for all the subsections: Description of the Program, Work Schedule, Budget, and Staffing and Site preparation. Any subtitle should be offset by a heading, so that the audience members who only need those bits of information will find the areas quickly.

- **Description of the Program:**
  - Provides a more thorough description of the problem and of the solution or the program.
  - You would include in this section a work schedule and a budget—preferably by using graphs or time tables.
    1. Direct costs refer to everyone’s salary and any fringe benefits such as travel cost etc.
    2. Indirect costs cover the overhead or secretarial, clerical, operating expense, all overhead.
- **Task schedules** can be created in one of three ways:
  1. *Tables* the simplest method.
  2. *Bar charts* give more information but still are limited.
  3. *Network Diagrams* are designed to provide more information and diagram the interdependence among the various activities and when one begins and if one ends while another begins. You can put the day it begins, the task, and the day it ends in relationship to other tasks.
- You will also provide staffing information and refer to the appendices for resumes.
- If there is a site preparation, it will go here.
- If you need to train people, you will include that in this space.
- You should end this section with a request for approval.
- **Deliverables:** Deliverables are the service, goods, or research that you are going to provide to the audience. You need to be specific about what you are delivering.

**Conclusion**—Use this opportunity to summarize the proposal’s key points and include your company’s strong points. This is your chance to leave a lasting impression, so think this one out really well.

**Back Matter:** This section provides your reader with information that would have bogged down the body of the proposal.

**Appendixes**—is where you include the resume of key employees, organizational charts, workflow diagrams, any proof of qualifications of any of your employees. (Resumes are an important element of your proposal. Take the time to make certain all of your participating members’ resumes are professional.

**Bibliography**—use this to list your sources that you consulted in preparing your proposal—even if you are using sources from your own company.

**Glossary**—is where define technical terms. This would also include organization names that may not be familiar to your readers.