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:
1. You understand their needs
2. You know what you are going to do and that you are capable
3. You are a professional and are responsible

Organization and Typography are important considerations

- **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.

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

**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.

1. **Cover letter**—or— **transmittal letter**—Functions to identify who you are and your company. Usually three of four paragraphs. This document is formal and should be written in the formatting of a business letter or if it is going inside your company, you may use a memo.
   - You and/or your company
   - 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
2. **Title Page**—Function is to provide the audience with all of the specific information.
• Includes the title of the proposal
• The date, the name and logo of the organization where it is being submitted
• 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

3. **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.

4. **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.

1. **Summary or Executive Summary**—the summary is designed to provide a few sentences on each of the major elements of your proposal.
   • You should have a clearly written statement of the proposal. (This proposal is requesting __________ for the purpose of__________. Or the purpose of this proposal is to_________ in order to__________)
   • You will define the problem
   • You will describe the program you are proposing. You will give a brief statement of your qualifications and experiences
   • You can include the budget and completion date as well
   • What are the outcomes—the deliverables

   **Note:** The summary is the most important element of your proposal. The executive summary is sent to executives whose jobs are to make decisions about proposals.
   • Executives are busy and don’t like wading through unnecessary information
   • You must persuade them that your proposal is worth their effort, so stick to the basic information of the statement of purpose, a brief definition of the problem or need, the description of your proposal along with your qualifications, a budget, and the most important information the outcomes
   • Make this information readable
     a) Construct your sentences so that they are brief and to the point
     b) Edit your summary for writing errors
     c) Use an organization that allows for easy access
     d) Keep the language appropriate for your audience
   • If the executives that you are sending your summary to are not as technical as the other team members, do not fill the summary with technical terms; instead, break that information down into easy to read information.

2. **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) 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 and provide that information.

3. **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
  1) Provides a more thorough description of the problem and of the solution or the program.
  2) 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.

- Work or 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.
     a) You will also provide staffing information and refer to the appendices for resumes.
     b) If there is a site preparation, it will go here.
     c) If you need to train people, you will include that in this space.
     d) 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.
  1) Consider the detailed product or service.
  2) What, if any, product or service the company is now using.
  3) The exact cost of this product or service.
  4) Long term savings in both money and man power.

4. **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 impressing, 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.

1. **Appendixes**—appendix is where you include supplemental information:
   - Resume of key employees. Resumes are an important element of your proposal. Take the time to make certain all of your participating members’ resumes are professional
   - Include insurance information for your company and your employees
   - Support staff: accountant, bank, attorney, insurance companies, etc.
   - Organizational charts
   - Workflow diagrams
   - Proof of qualifications of any of your employees. You will provide licenses, certificates, bond information, and permits

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

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