Formatting Your Proposal

Proposals are persuasive documents that are written for more than one audience member.

1. **Goals:** Your goals are to persuade your audience of the following:
    A. That they have a need.
    B. That you understand that need.
    C. That you have a plan and are capable of executing it.
    D. That you are a professional and responsible.

2. **Organization and Typography:**
    A. 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.
    B. Typography: Take advantage of the ability you have to organize and emphasize your text using bold, italics, and underlining. Create a heading for each section and with each section provide subheadings. The key to successful typography is consistency and organization.

3. **Format:** Proposals—especially longer proposals (5 or more pages)—are divided into three parts: front matter, body, and back matter.
    A. 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.
        I. Cover Letter or Transmittal Letter: Introduces you and your company (usually in three or four paragraphs). This document is formal and should be written in the formatting of a business letter, or if it is an in-house (your own company), you may use a memo. You will cover the following in the transmittal or cover letter:
            a) Introduce you and/or your company.
            b) Express gratitude for the company allowing you the opportunity to submit your proposal as well as gratitude for any help from the company by way of research materials.
            c) Remind the person or company of any prior relationships you or your company may have had with their company or what similar work you have accomplished.
            d) Write a brief summary of the proposal's recommendations. (Business writing begins with the ending. Explain what you are going to do and the cost.)
            e) End with the qualifications you have for this project.
        II. Title Page: Functions to provide the audience with all of the specific information. Includes the following information:
            a) The date, the name, and the logo of the organization where it is being submitted.

      b) Your company name and logo. (This is an important part of the proposal.)

      c) Some people will include a brief summary of the entire proposal in this section.

III. Table of Contents (TOC): Functions to guide the readers to specific sections of the proposal. Remember, different sections of the proposal will be read by different audience members. A good TOC will provide each audience member with a quick guide to those sections pertaining to him or her. Typically, this is formatted with the title of the heading or section followed by the page number.

IV. 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.

B. Body: The body is broken into four parts: the executive summary, the introduction, the body, and the conclusion.

I. Executive Summary: The summary is designed to provide a few sentences on each of the major elements of your proposal. **(Refer to the Executive Summary resource.)**

II. Introduction: The introduction assists the reader in understanding the proposal's scope, context, and organization. It should emphasize the benefits for the audience. The introduction should provide information on the following:

      a) The problem or opportunity in specific monetary terms.

      b) Activities that will end in a deliverable.

      c) The background of the problem, using your research. This gives you an opportunity to showcase your knowledge.

      d) Your sources, which can be material from internal documents 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.

      e) 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.

      f) The organization of your proposal.

      g) The important terms or concepts.

III. 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, Budget, Work or Task Schedules, and Deliverables. 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.

      a) Description of the Program: Provides a more thorough description of the problem and the solution.

      b) Budget: Includes a detailed a budget—preferably by using graphs or time tables.

         i. Direct costs refer to everyone's salary and any fringe benefits, such as travel costs.

         ii. Indirect costs cover the overhead or secretarial, clerical, operating expenses, etc.

c) Work or Task schedules: Provides staffing information and refers to the appendices for resumes.

         i. Can be created in one of three ways:

              1) Tables are the simplest method

              2) Bar charts give more information, but still are limited

              3) Network Diagrams diagram the interdependence among activities.

         ii. If there is a site preparation, it will go here.

         iii. If you need to train people, you will include that in this space.

         iv. You should end this section with a request for approval.

d) Deliverables: Deliverables are the services, goods, or research that you are going to provide to the audience. You need to be specific about what you are delivering. Provide information on:

         i. The detailed product or service.

         ii. What, if any, product or service the company is now using.

         iii. The exact cost of this product or service.

         iv. Long term savings in both money and man power.

IV. 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.

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

A. Appendices: The appendix is where you include supplemental information:

    I. 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.

    II. Insurance information for your company and your employees.

    III. Support staff: accountant, bank, attorney, insurance companies, etc.

    IV. Organizational charts.

    V. Workflow diagrams.

    VI. Proof of qualifications of any of your employees. You will provide licenses, certificates, bond information, and permits.

B. Bibliography: Use the bibliography to list the sources that you consulted—even if you are using sources from your own company.

C. Glossary: This is where you define technical terms and organization names that may not be familiar to your readers.