

Creating Winning Proposals



McAndersen

McAndersen International Limited



Career Development Series

Creating Winning Proposals

TABLE OF CONTENTS

<i>How to Use This Guide</i>	1
<i>Session One: Course Overview</i>	2
<i>Session Two: Sources of Funding</i>	5
Trends in the Funding Environment	5
Types of Funders.....	6
Potential Funders.....	7
<i>Session Three: Funder Selection</i>	8
Personal Proposal Funder Selection	9
<i>Session Four: Types of Proposals</i>	10
Proposal Forms	10
Letter Proposal.....	10
Partnership Proposals	12
<i>Session Five: Proposals as a Relationship Builder</i>	14
Building the Relationship	14
Going Steady	19
<i>Session Six: RFPs/RFQs (Requests for Proposals or Request for Quote)</i>	20
RFPs/RFQs (Requests for Proposals or Request for Quote).....	20
RFP Case Study	22
<i>Session Seven: The Ten Steps of Proposal Writing</i>	23
<i>Session Eight: Defining Your Proposal</i>	26
<i>Session Nine: Key Elements of a Proposal</i>	27
Key Elements.....	27
<i>Session Ten: Defining the Needs and Desired Results</i>	28
Defining the Need	28
Desired Results.....	28
<i>Session Eleven: Resources and Activities and Evaluation</i>	30
Resources and Activities	30
<i>Session Twelve: Sustainability and Budget</i>	35
Sustainability.....	35
Budget.....	35
<i>Session Thirteen: Conclusion, Introduction, and Executive Summary</i>	41
Conclusion, Introduction and Executive Summary	41
<i>Recommended Reading List</i>	46
<i>Post-Course Assessment</i>	47
<i>Pre- and Post-Assessment Answer Keys</i>	Error! Bookmark not defined.
<i>Personal Action Plan</i>	49

How to Use This Guide

This Self-Study Guide is designed and laid out in a way that will guide student learning much in the same way that an instructor would. This workbook is comprised of modules called *Sessions*. Each Session focuses on a major concept in the course.

In each *Session*, we have included short-answer and (in some instances) multiple-choice questions which relate directly to the session material. Throughout the guide, you can take the opportunity to internalize what you have learned by completing various self-reflection exercises.

Session One: Course Overview

Course Overview

Proposals are persuasive documents that are fundamental tools in organizational funding and output. This course will look at sources of funding, types of proposals and how to write proposals that will meet funding agencies requirements. This will include a number of tips and techniques to increase the potential success of your proposals. An important but often overlooked aspect of proposal writing will also be covered- Building and Maintaining Relationships. Relationships are built on honesty. Potential projects must be a good fit for your organization and your organization must be ready to do the work contained in the proposal. The most successful proposals are going to be those that fulfill the mission and values of your organization and that of the funding agencies as well!

Learning Objectives

After you complete this course, you will be able to:

- Locate potential funders for your organizations on the Internet and use evaluative skills to identify the appropriateness of funding related to your own organization
- Explain the necessity of matching funders interests with organizational needs and use this knowledge in decisions about the validity of submitting a funding proposal
- Describe and understand the basic elements of proposal writing for not-for-profit organizations
- Describe and understand the basic process for successful proposal writing
- Analyze effective relationship-building strategies to engage with funders and use this knowledge in writing a funding proposal
- Describe at least five reasons why funding proposals can be rejected
- Plan, write and submit a proposal in response to funders guidelines

Why did you take this course? Use this opportunity to consider your personal learning objectives and reasons for taking this course.

Session Two: Sources of Funding

Any successful proposal writer needs to have a thorough knowledge of the funding environment that they hope to tap into. Not only is it important to know who is out there but also who they fund and why.

In this session, you'll identify trends in the funding environment, types of funders and you will identify potential funders that you may be able to connect with.

Trends in the Funding Environment

It is a challenging funding environment for non-profits, charities and community organizations. There are more organizations looking for money than ever before while at the same time, because of diminished budgets, there are fewer funding opportunities now than there was 10 years ago. As a result Funders receive many more requests than they can possibly fill.

What does this mean for those trying to access funds?

You need more than a great idea!

A Cautionary Tale

- All organizations must earn support and prove worthiness
- Proposal writing is hard work
- Can be made easier with organization and practice
- Proposal writing is about relationships
- Successful or not, proposals are an opportunity to begin a relationship
- You need to show a funder that you are the best choice for their project/program
- Always focus on those you serve - a proposal must meet their needs not only your organization
- Remember, it will not happen overnight! Think long range.

Funders Brainstorming Activity

Fill in the blank in the statement below with appropriate responses.

If you expect to be successful in raising money you need to realize that funders _____.

Types of Funders

There are a number of different funders from a variety of areas, including:

- Government
- Municipal
- Provincial
- Federal
- Giving Foundations
- Family
- Corporate
- Community
- Service Club
- Not-for-Profit Organizations

Sources of Funding Activity

Write down as many funding organizations as you can think of.

Session Three: Funder Selection

Once you have identified potential funders for your projects it is important to see if they would be a good fit for the work you are proposing.

In this session, you'll investigate the potential funders identified in the last session to see if they are indeed a good fit for your proposal.

In the space below, brainstorm the variety of projects that you have been involved in or you have heard of.

Personal Proposal Funder Selection

Using the potential funders from the previous exercise research funders that may be a good fit with the proposal you would like to write. Use the Potential Funder Information Sheet provided.

Horizontal lines for writing.

Session Four: Types of Proposals

Now that you have a potential funder in mind it is time to select the type of proposal you would like to submit.

In this session, you'll learn about three of the most common forms of proposals; Proposal Forms, Letter Proposals and Partnership Proposals.

Proposal Forms

There are many proposals that have been refined to forms. The applicant simply fills out the form and sends it to the originator.

Sounds easy- but it is just as hard as a full blown proposal!

Example:

Have a look at the Canadian Department of Environment's Environment Damages Fund. The information they want is in a form.

The information in the form covers all the areas of interest for the fund administrators:

- Applicant Information
- Project Contact
- Project Summary
- Project Description
- Evaluation
- Other Relevant Information
- Funding Summary
- Budget
 - Human Resources
 - Equipment & Supplies
 - Other Expenditures
 - Other Funding Sources, if applicable
- Source Contributions
- A completed Application Checklist

Letter Proposal

Many projects are small and do not require large complex proposals. Still other proposals start with a proposal letter in the first phase then a smaller select group responds with a more

complex proposal. As well, these are typically used when requesting funds from a foundation. Regardless of which you need to be sure to include everything that a funder requires to make their decision.

These can be difficult because they are typically two or three pages - it can be very difficult to get everything you want to say down in that space. Letter Proposals need to convince the funder to consider your request.

Here are some things to keep in mind:

- Why you are writing
- If you have had previous contact - mention it.
- Establish a connection between your organizations based on something your goals and their priorities

What you are looking for

- Money (if so, how much?)
- Equipment

Why you need it

- Clearly and concisely describe the need
- Emphasize the need to your constituent group not your organization
- Define the target population, statistics- with real examples

What you will do with the money

- Outline the purpose of your request
- State how this fits with yours and their mandate
- How you are going to address the need-be results oriented in your description
- Emphasize the impact that this project will have (short-term and long-term)
- Be sure to outline the proposed timeline

Your organizations information

- Mission statement, past projects, accomplishments, organizational information, your constituency
- Your annual budget

Project Budget

- Show how their money, equipment, etc. fits with other sources, in-kind, other funders etc.
- This could also be added as a separate sheet

Closing

- Sum up and offer for them to contact you for more information.

Tips:

- Be concise
- Don't be too formal
- Keep it a good tone
- Remember that you are building a relationship

Partnership Proposals

Why would Business Want to Partner with Not-for-Profits (NFP)?

- Corporate Social responsibility is more important to businesses now
- It helps them market their brand
- Improves recruitment and retention of good employees
- Strong communities help businesses
- Global business needs to embrace multiculturalism

Why would Not-for-Profits want to Partner with Business?

Challenges

There are a number of challenges to any successful partnership especially between a business and a Not-for-Profit. The two entities are quite different in their composition, approach and resources. Challenges can include:

- Getting both sides together
- Having common goals, vision
- Internal resistance (by both sides)
- Power Imbalance
- Maintaining the relationship

Minimizing the Challenges

By approaching a partner that shares your organizational interests you can minimize potential challenges. Further, by mapping out your expertise, facilities and capabilities as an organization the other partner can easily see how the two organizations can work together.

Session Five: Proposals as a Relationship Builder

Proposal writing is more about building a relationship than anything. The better the relationship between the funder and your organization the more successful you will be as a proposal writer.

In this session, you'll look at the stages of building a relationship with your potential funder. You have already found each other now you need to get to know each other, decide if you want to connect, go on a first date and then if all goes well you'll decide to go steady.

Portfolio Approach

Like an investment you need to create and nurture a funding portfolio. It can include a number of funders. There are basically two types of funders:

- Small sums given frequently
- Large sums given infrequently.

You will need to include both in your portfolio.

Building the Relationship

We are going to talk about five steps that are required in building any relationship.

- Finding Each Other
- Getting to Know Each Other
- Asking: Do you want to connect?
- First Date
- Going Steady

Finding Each Other

- Funder Search (previously)

Getting to Know Each Other

Know Yourself

As a proposal writer you must have a clear understanding of your organization's mission, values and goals. You need to know your organizations strategic plan as well as:

- organizational structure, affiliations and memberships

- charitable status (if applicable)
- infrastructure (equipment, buildings, lease agreements);
- past proposal (related or not) and success measures
- qualifications of personnel (staff and volunteer)
- current organizational partnerships
- operating budget
- where you fit in with other similar organizations

Additionally you should have client testimonials and references ready.

Know Yourself Exercise

Using the information from your Pre-Assignment, write a short (one page) summary of your organization as it would appear in a proposal. Consider including:

- your organization's mission, values and goals
- your organization's strategic plan
- organizational structure, affiliations and memberships

Find out about them (for each potential funder)

It is important to research the funding organization. In order to know if it is the right fit with your organization you should have a clear understanding of their mission, values and goals. In this way you can determine if your proposed project furthers the mission of both organizations. Additional information that would help you to determine if there is a good fit includes:

- their funding objectives
- the geographical area they serve
- the application process and deadlines
- the eligibility requirements
- the levels of funding available, and
- the requirements for matching funds.

It is also a good idea to look at who they funded in the past. Information about the types of organizations and projects they typically fund can be a great help.

Where do you find this information?

- Organization's Website
- Annual reports
- Newsletters
- Communications
- List of previously funded projects
- Other Websites
- Government

- Information Gathering (Charity Village, etc.)
- Key Informants
- People who know the organization

Do you want to connect?

Before contemplating a first date you need to realize that funders want success and are looking for organizations that they can count on. You should ask yourself two initial questions:

- Is the funder a good fit with your organization?
- Will their projects/programs help to fulfill your goals and objectives?

If the answer is yes to both these questions then you need to do an organizational self-assessment.

Self-Assessment (Answer as if being audited)

Questions	Yes	No
Does your organization have a documented		
Vision?		
Mission Statement?		
Values Statement?		
Do your organizational vision and values align with the funders?		
Is your organization sound financially?		
Does your organization have a Strategic Plan?		
Do you have human resources capacity to take on new projects?		
Does your company have the capacity to manage projects?		
Can you partner with other organizations to fill project gaps?		
Do you have a record of project success?		

If you answer no to any of these you need to fix them before proceeding to apply for funding- you are probably not ready.

The First Date

A good proposal writer makes themselves knowledgeable about every aspect of the proposal they are completing.

They need a clear understanding of the proposal:

- Target audience
- Project benefits
- Timelines and deliverables
- Required resources (human, financial, equipment, buildings, etc.)
- Budget
- Evaluation requirements and methods
- Publicity and Promotion requirements

A Decision tool can help in your deliberations. An example is given below.

Project Decision Tool

Questions	No	Not Really	Could	Sort Of	Yes
Will the project help your target audience?					
Do you have the experience to successfully complete this project?					
Do you have the expertise to successfully complete this project?					
If you do not have the experience or expertise can you source it elsewhere to fill the gap?					
Is the proposed budget enough to successfully complete the project?					
Will this project increase your organizations sustainability?					
Considering your answers above: Does this project fit with your organization?					

If your answer falls within the shaded spaces you should proceed to the Proposal.

Project Decision Exercise

Sketch out a project that you are contemplating. Then check it against the project/program decision Tool.

Going Steady

If you have decided to engage with the funder for a specific proposal you are now ready for the beginnings of a true relationship. Nurturing it will ensure continued success.

You now need to start a relationship with your potential funders. This can take many forms.

Going Steady Activity

Write down as many ways as you can think of to nurture a partnership.

Session Six: RFPs/RFQs (Requests for Proposals or Request for Quote)

RFPs are one of the types of proposal writing for large companies and those seeking to provide goods and services to government, consortia or other large companies. Success rates are usually low unless you provide a unique product or service.

In this session, you'll learn about the common elements of RFPs, sources of RFPs, how to increase your chances of success and you will work on an RFP Case Study.

RFPs/RFQs (Requests for Proposals or Request for Quote)

RFPs are designed for a company looking for goods or services to connect with a company that can provide those goods or services. They can be for varying amounts of money but generally are classified as small/ medium or large.

Common elements of RFPs

- Company Information
- Bid or Solicitation Number- which must appear on all documents
- Specifics of goods or services required
- Statement of Work with Deliverables
- Payment Terms
- Instruction, Conditions and Notices
- Evaluation Factors

Writing RFP Responses are difficult, time consuming and have a very low success rate (for first time responses a 10% success rate is probably good). Therefore, the motivation to respond to RFPs needs to be that of building a relationship. Even if you do not get the job your proposal can be a calling card to become known to the company or government agency. This can then be leveraged to increase your chances on future RFPs.

When responding to an RFP there are things you can do to increase your chance of success:

Read the RFP

- This may seem intuitive but this is probably the part of proposal writing that is most poorly done
- The client is telling you exactly what they want and they expect you to show them how you are going to do everything they ask
- If the requirements are vague you will need to research (their website, previous RFPs, reports of similar work, etc.) to clarify your understanding

Reread the RFP**Follow the requested format**

- If the RFP has suggested a format for your response- do it exactly as they want- this will make it easier to know you have met all the requirements and they will have an easier time judging your response

Answer the questions (supply requested information)

- The proposal sets out what the client wants, they carefully write questions so you must carefully read the questions
- If you do not answer the questions or answer questions that were not asked then the client knows you are not a good listener

Be concise

- Do not add any information that is not asked for
- Stick to information that supports your proposal

Let the client know that you are the best choice for the project

- In everything you write show that you are the best person/company for the job- the confidence will come out in the proposal
- Look at the proposal as a chance to start a relationship. They should be able to see you as a great fit for their future.
- Give proof of your qualifications and offer references to back it up
- Provide relevant projects that you have completed is the best way to do this

Pricing

- Take extreme care in creating a budget. No matter how much the RFP is worth if your costs are higher you will be losing money (and ultimately reputation)

The Executive Summary

- This is where you need to shine! The Executive summary will be the first impression they have of you/your company and your ability to do the job. You need to hit all the key points of your proposal including budget and of course-why you are the best one to do the job!

Remember- In everything you write make sure you are showing how you/ your company is set apart from the other competitors.

Session Seven: The Ten Steps of Proposal Writing

Now that you have selected a funder and determined the type of proposal you need to write you need to begin the planning of your proposal.

In this session, you'll learn about the ten steps in proposal writing.

The ten steps of proposal writing are:



Let's break these ten steps down.

Clarify Your Objectives

What is this proposal going to do?

- Tell or inform?
- Sell or persuade?
- Play a consulting role?
- Convince someone to do something?

Analyze Your Audience

- Who is your primary reader? Who is your secondary reader?
- What is the reader's knowledge?
- How will the reader benefit from your message?

Get Your Thoughts on Paper

Here are some intuitive methods:

- Mind map
- Brainstorming
- Free writing
- Sticky notes
- Index cards

Here are some analytical methods:

- Focusing (topics and subtopics)
- Five W's (who, what, when, where, why)

Group and Label Your Thoughts

Now, the outline begins. The easiest way is to sort your information by topics and subtopics.

Sequence Your Thoughts

Here are some ways to put your thoughts in order.

- Most to least important
- Least to most important
- Process
- Contrast/comparison
- General to specific
- Specific to general

Make an Outline

Now that you have your thoughts in order, draft them into an outline. Remember, this is just a road map, and it can be adjusted.

Write Your Draft Down

Using your outline as your road map, write out your draft. Then, let an outsider review it.

Edit

- Delete
- Keep terminology consistent
- Keep a consistent format
- Avoid buzzwords and jargon
- Write in the reader's language
- Don't rely on grammar and spell checks
- Have a low fog index

Add the Finishing Touches

- Use a readable font
- Include headers and footers
- Make use of graphics
- Include headings that speak to the reader

Proofread and Edit

This is the last step, although you need to run through it several times before you are really finished!

Session Nine: Key Elements of a Proposal

Now that you have an outline of what you would like to write your proposal on it is important to learn about the key elements found in most all proposals.

In this session, you'll learn not only the key elements in a proposal but also the order in which you need to write them.

Key Elements

If a funder has provided specific application details always follow those. If not there are some common elements that can be looked at. Most proposals would include the following components:

- Executive Summary
- Introduction
- Defining the Need
- Desired Results
- Outputs
- Outcomes
- Impact
- Resources and Activities
- Budget
- Evaluation Plan
- Sustainability
- Conclusion
- Appendices

Write down the elements of the proposal in the order that they would be completed in.

Session Ten: Defining the Needs and Desired Results

The first things you need to define in your proposal are the needs being addressed by the proposal and the results that you are hoping for should you receive the funding for your project.

In this session, you'll learn how to define the needs you are addressing and the direct and indirect results of your project.

Defining the Need

Hopefully the reader is interested in finding out details after reading the Executive Summary. This is where you explain the needs that you are going to address.

You need to outline the problem that you are going to address with specifics about the target audience and the need from their perspective. You are seeking this money to primarily help your target population not your organization. You will need to show a tie to your organization's mission. Of course you will also need to include reference to previous work with this population, previous studies or projects. Include all stakeholders as well.

When showing that you fully understand the needs for this project be sure to use facts and evidence- this is no time for speculation and platitudes. Be careful in showing the need that you do not paint too bleak a picture! It is important that you show the problem to not be insurmountable and that you provide a unique solution to the problem. If others have attempted to address the situation acknowledge them and without being critical, show how your project will address the needs.

Also remember to be realistic in what you can accomplish- it will show in your proposal if you are promising things you cannot possibly deliver!

Desired Results

This section outlines what you expect to achieve in the short and long-term.

Results can be direct activities or services that you provided. For example, the number of courses provided, hours of service per week, number of information packages delivered, etc. Be sure to specify who will receive the products or services. As well, make sure the activities are easily defined and measured.

Other types of results could be a direct result of the products or services you provided. These could be changes in attitudes, behaviors, skill, knowledge, etc. These results could be quantitative or qualitative but it is still important that they be measurable. To help get the significance of what you are doing across use action words; increase, decrease, reduction, elimination, etc.

Although more difficult to quantify you should also look at reporting potential benefits beyond the project itself. These can be community-level changes and are typically longer term (usually 5 or 10 years). These results could be improved health outcomes, increased community activity or more self-reliant citizens. Remember these must also be measurable.

Work on this section of the proposal you are writing even if you are simply writing a bulleted list of ideas that you can expand on later.

Session Eleven: Resources and Activities and Evaluation

The funders are interested in whether you can do the job that you are requesting money for. The Resources and Activities and Evaluation sections of your proposal are where they will look for convincing evidence that their money will be well spent.

In this session, you'll learn what funders are expecting you to cover in the Resources and Activities as well as the importance of having a measurable evaluation process in place.

Resources and Activities

Resources

This section outlines the resources that you will need to successfully implement your project/program.

Resources include:

- Human, financial and organizational
- Staff and volunteers
- Additional resources
- Board Members (particular expertise)
- Community (in-kind) e.g. expertise, library space, equipment loan, students, etc.

Note: The resource allocation should convince that you have the right people, time commitment, partners to be successful.

Staffing

For staffing the project/program you should outline:

- Staff Member/ Volunteer
- Status (FT/PT/Contract, time commitment)
- Qualifications
- Expertise and Experience (important later for budgeting)
- Assignment

You may put a short description of the staff in this section then put a resume of key staff members in an appendix.

Example of Personnel Template

Product Development						
Team Member	Education		Training	Curriculum Development Expertise/ Experience		Status
				Yrs.	Example of Projects	
John Frank	MEd	Curriculum Studies	<ul style="list-style-type: none"> • QMS Lead Auditor • EMS Lead Auditor • HACCP Supervising Instructor • Teaching and Learning • Project Management Breakthroughs • Student Admin for PeopleSoft 	28	For Bright Days College <ul style="list-style-type: none"> • Quality Yellowbelt • Development and Design of Programs • Test and Measurement • Natural Resources Environmental Technology 	Employee
	MSc	Biology			For DS Dept. Agriculture <ul style="list-style-type: none"> • Aquatic Habitat Specialist Diploma • Aquaculture On-line Certificate 	

Administration

The administration of the project/program is very important. The administrator will be the person the funder deals with directly and they must be confident in that person.

Example of proposal piece for administration and team

Project Managers Qualifications & Skills

Lead project manager on educational projects, Frank has spent over 25 years working in the education field and managing educational development projects on time and on budget. Frank was a Certified Lead Auditor with Golden Touch LLC for several years and has expertise in QMS auditing and development. With the Fram Components Curriculum Procurement Project, Frank will be responsible for overall planning, coordination, and execution of the project. (See Appendix G for Frank’s Resume)

Qualifications of the Project Team

As a company, MacroSoft has been designing curriculum for over 14 years. We intend to draw on this team to make sure that the Fram Components Curriculum Procurement Project is successful (See Appendix G for team bios and resumes). This project will directly involve:

Curriculum	Technical
<ul style="list-style-type: none"> ○ John Frank MSc, MEd ○ Project Management 	<ul style="list-style-type: none"> ○ Ron Coward BSc ○ LMS Lead Developer and Support
<ul style="list-style-type: none"> ○ Sam Mooney, Ph.D. ○ Curriculum Lead 	<ul style="list-style-type: none"> ○ Bill Church, BSc ○ eLearning Innovation and HTML5 Expert
<ul style="list-style-type: none"> ○ Alisa Koslovicstan, BJH ○ Content Quality Assurance 	<ul style="list-style-type: none"> ○ Tim Taylor ○ Online Developer and User Experience Manager
<ul style="list-style-type: none"> ○ John Frank MSc, MEd ○ Subject Matter Expert 	<ul style="list-style-type: none"> ○ Jim Tiberius ○ Creative Director

Activities

This is the section that completes the questions: What, Who, When, Where, Why and How. You already have a beginning though. In the Needs and Resources Section you have already looked at Why, Where and Who.

Now for the rest of the questions.

What

This requires a scope of activities and who is responsible for each specific activity.

When

This requires start and finish dates for the overall project and each individual activity.

How

This is where you outline your Work Plan with step-by-step activity listings.

What

You reiterate the expected outcomes and give a brief description of how you will evaluate the results.

Evaluation

This section is extremely important. It is where you describe how you will know that your project has been successful and effective. This is where you are glad that you made sure all your results were measurable. If you cannot show that your project was successful the funder will have no idea if their support was beneficial. As we mentioned previously the results can be quantitative (number of...) or qualitative (change in attitude, perspectives, etc.).

Good evaluation needs to be collaborative and needs to include input from all stakeholders in its development and implementation. You should explain how data will be collected- Quantitative (survey, tracking form, etc.), Qualitative (interview, focus group, etc.). As well, you need to explain how it will be analyzed and stored.

Evaluation Indicator Template (example)

Activity	Outcome	Indicator of Success
<ul style="list-style-type: none"> ○ Develop and hold a series of free 'Volunteering' courses for at risk youth in Springfield County 	<ul style="list-style-type: none"> ○ Increased understanding of the benefits of volunteering ○ Increased youth participation in volunteering 	<ul style="list-style-type: none"> ○ 75% of initial participants complete the volunteering courses ○ 50% of graduates begin to actively volunteer in the 3 months after the training ○ 80% of volunteers continue to actively volunteer one year after program completion

Session Twelve: Sustainability and Budget

Your organization's sustainability is very important to a funder- they want to be sure that their monies will be used effectively and efficiently and knowing that your organization is stable and will hold in for the long-term is very reassuring. Also funders are reassured by knowing that you are realistic in knowing the money necessary to successfully complete your project and that you will handle their money well. That is where the budget comes in.

In this session, you'll learn what funders are expecting you to show them that you are sustainable and will be good stewards of their money.

Sustainability

Funders are interested in the sustainability of the organization they are giving monies to. Thus interest is to ensure the organization can successfully complete the proposed work but also because funders are in some ways altruistic and want to see organizations succeed.

The best way to show that the project is helping with the sustainability of the organization is to show that it fits into the Strategic Plan. To enhance the sense of sustainability you can also describe how you will continue this project after their support ends- for example do you have plans to obtain additional monies after the support ends, have you been able to train personnel to continue the work or perhaps you will pass the project on to another organization.

Budget

The project budget is a representation of your organization and the impression it gives is important. It must convey to the reader that your organization can manage the funds provided in an efficient and effective way. They need to know that you and your organization will be responsible with their money.

The budget must make sense and be easy to understand. It needs to show how the funds provided by the funder fit into the project and where other monies (or in-kind) fit in as well. If there is any income being proposed (contributed, donations, etc.) it must appear in the budget.

The Budget

- May be as simple as a one-page statement of projected revenue and expenses
- May require a more complex presentation
- Projected support
- Notes explaining items expense/revenue.

Expense Budget- Steps

- List all personnel
- List all non-personnel items (capital and operational)
- Find and list out the costs for all items (from inside organization and outside-suppliers, etc.)
- For personnel include salaries, benefits (for internal and consultants)
- Non-personnel could include travel, equipment, program materials, office expenses (including overhead if allowed- things like rent and administration)

Revenue

- Include if it is expected (e.g. tickets for benefit concert)
- Deduct for total expenses

Pricing Case Study

Schedule of Resources Example:

Objective: To determine the reason(s) for the decline in the numbers of trout in the Salmon River by October 25.

Tasks:

- Visit river and map
- Complete survey of trout
- Complete survey of invertebrates
- Perform water tests at selected sites
- Etc.

Project Schedule

#	Tasks	PRIORITY	Person Responsible	Deadline
1	Visit river and map	A	Myself	October 5
2	Complete survey of trout	B	Joe Assistant	October 12
3	Complete survey of invertebrates	B	Jane Assistant	October 12
4	Perform water tests at selected sites	C	Joe Assistant	October 17
5	Etc.			

Resource Schedule

Required Resource	Dates Needed	Provided By	Estimated Cost
Vehicle	Begin - End project	Myself	\$0.45/km
2 assistants	October 7 - 21	Client	\$20.00/hr. each
Electro-fisher	October 7 - 17	Myself	\$100 per day
Etc.			

Time Table: October 2015																			
Tasks	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
Map river	Me																		
Trout survey						1 Crew													
Inver. survey						1 Crew													
Water tests						2 Crews													
Write report																		Me	

Labor Costs

If you are hiring employees, you need to know three things in order to estimate labor costs:

- The hourly rate,
- The applicable payroll taxes and
- The number of hours worked.

Starting out, you can obtain this information from a number of sources:

- The local Employment Centre
- Colleagues in the Industry
- Previous projects

Once you have the hourly rate and determine the number of hours they will work, obtain the other employment costs (Pension Plan, Insurance Premiums, etc.) that your company pays from your HR department. Finally, add in any other benefits you are required to pay - vacation pay for example.

Example (not actual rates of insurance/pension)

Hourly Wage Rate	\$20.00
Hours of Work 40 hrs.	
Gross Pay	\$800.00
Employer's Pension 4.95% =	\$39.60
Employer's Insurance 1.88% =	\$15.04
Worker's Compensation	\$5.75
Vacation Pay (@ 4%)	\$32.00
 Total Labor Cost	 \$892.39

This gives you the total labor cost for that employee. If you have more than one employee on a project, at different wage rates, then you will need to repeat these calculations. Remember, you should allow for a margin of error in your estimate of hours as tasks may take longer than expected or be delayed.

Equipment & Materials

Identify the equipment and materials you need. Then calculate the total cost for each item based on the rental rate and the time it is needed. Don't forget to include any taxes, delivery charges or deposits you may be required to pay.

Examples:

Chainsaw Rental \$80/day @ 12 days \$960.00

Tax \$78.40

Total Cost \$1,038.40

Refundable Deposit 50.00

Re-bar (500ft. @ 1.50/ft.) \$750.00

Delivery charge \$25.00

Tax \$142.53

Total Cost \$917.53

Once you have tallied the total expenses during the duration of the project you are ready to enter them into the project budget.

Overhead

Overhead associated with the project can take two forms:

- Overhead of your business
- Overhead of the project.

The overhead related from your business should be built into your fee for the project management.

Overhead associated with the project should be estimated and placed in the budget. It includes things like telephone charges, printing and other administrative costs.

You will have to be careful to only include those items of overhead that are covered by the project grant/budget. There might be no allowance for overhead costs in a project you have been awarded.

Other

Normally, to allow for those costs that are not anticipated, there is an amount budgeted for other or miscellaneous. This allows you some margin of error and money for contingencies.

Normally, it is not an excessively large amount. It should have been included in your proposal. If not make an estimation of it now. You may wish to use 5 to 10% of the total budget as a guideline.

What goes in the Proposal?

- o Summary information (not details)

Work on this section of the proposal you are writing even if you are simply writing a bulleted list of ideas that you can expand on later.

Session Thirteen: Conclusion, Introduction, and Executive Summary

Now you are nearly finished your proposal. The finishing touches are the Conclusion, Introduction and Executive Summary.

In this session, you'll learn the essential information to include in your Conclusion, Introduction and Executive Summary.

Conclusion, Introduction and Executive Summary

Conclusion

In a couple of paragraphs you need to:

- Convince the funder that you are the best organization to do the work that you have detailed in the proposal
- Summarize what you want to do and why it is important
- Reiterate why you need the funding

It is also important to remind the funder that they are getting 'value for money'. Other areas that you should cover include:

- Strategic partnerships
- Fulfillment of their and your mandates
- Sustainability
- What happens after this project concludes

You must be confident- it really does make a difference!

Introduction

Here you will provide a brief introduction to your organization and why it is the right one to carry out the proposed activities.

- Describe what your group or organization does (e.g., purpose, goals, programs, activities).
- Establish your group's credibility.
- Describe a past success or include testimonial from a stakeholder.
- Provide statistics that support your group's accomplishments.

Be careful not to put too much detail. You can put additional and support information in the appendices.

Appendices

Appendices are typically supplemental information and you must be sure to refer to the particular appendix within the body of the proposal. This does not mean it is unimportant but is generally something that is in more detail than you need in the body of the proposal. Typical appendix items include:

- Organizational Information
- List of Board of Directors
- Letters of support or references information
- Detailed financials
- Legal documents
- Annual reports
- PR pieces - newsletters, brochures, newspaper clippings, etc.

Executive Summary

The Executive Summary is the most important section of the entire document. Not only is it the first part to be read but if you catch the interest of the reader they will read the rest of the proposal with a more positive attitude. It summarizes all the key information in the proposal and can convince the reader that you are the right fit for the project.

Guidelines

The Executive Summary should be:

- Clear and concise
- No longer than two pages
- Be positive and show your enthusiasm

What to include

- The overall need
- Your solution for the need
- Description of the project (who, what, when, where and how)
- Effect on target audience (# people helped, community benefits)
- Funding requirements (present and future)
- Your organization's expertise and capacity to complete the project

Checklist Review

Task	Item	✓
Check the requirements.	All mandatory requirements are included.	
	All questions are answered?	
	Does it give proof of your qualifications and references to back it up?	
	Were relevant projects experiences included?	
Check the facts.	Are the facts correct?	
	Are there any assumptions?	
	Is the budget correct?	
Check the length.	Does it tell readers more than they want to know?	
	Does it miss important evidence?	
	Does it meet specified length requirement?	
	Could the proposal be shortened?	
Check the structure.	Does it follow the recommended structure?	
	Is the Executive Summary Powerful?	
	Is each paragraph unified and coherent?	
	Does the proposal exude confidence?	
Check the style.	Be on the lookout for lengthy, obscure sentences; wordiness; pretentiousness; overuse of the passive voice; and imprecise language.	

Task	Item	✓
	Read the report out loud and circle parts where you stumble or you find yourself bored.	
	Cut, rearrange, and rewrite.	
Check for errors.	Check spelling and grammar.	
	Check punctuation.	

Recommended Reading List

If you are looking for further information on this topic, we have included a recommended reading list below.

Birkets, Sven, and Donald Hall. *Writing Well (Longman Classics Edition)*. Longman Classics, 2006.

Bly, Robert. *Selling Your Services*. Owl Book, 1992.

Guffey, Mary Ellen. *Essentials of Business Communication*. South-Western College Pub, 2006.

Hamper, Robert J. *Handbook for Writing Proposals 2nd Edition*. McGraw Hill. 2011.

Pugh D.G. and T.R. Bacon. *Power Proposals*, American Management Association. 2005.

Sant, Tom. *Persuasive Business Proposals: Writing to Win More Customers, Clients, and Contracts*, 3rd Edition. American Management Association, 2012.

Personal Action Plan

Now that you have completed this course on **Creating Winning Proposals**, how will you use the things you have learned? Creating a personal action plan can help you stay on track and on target. When you take responsibility for yourself and your results, you get things done!

In this session, you will be asked questions to help you plan your short-term and long-term goals. This final exercise is a way for you to synthesize the learning that you have done and to put it into practice.

I am already doing these things well:

I want to improve these areas:

I have these resources to help me:

As a result of what I have learned in this workshop, I am going to...	My target date is...	I will know I have succeeded when...	I will follow up with myself on...