

November 2011 Presentation at the Queen Street Commons (a co-working site) – 224 Queen St., Charlottetown, PEI Canada - <http://queenstreetcommons.org/>



Getting Started

- **Don't** waste your time on proposals to potential clients that are not interested in **your** work
- **Do** your research, know a potential client's interests and if they are a good fit for your work

Getting to Know You*

- Getting to know all about you
 - Research your potential client – what do they value, what do they do
 - Read the RFP or meet with someone – what do they want, what do they need?

Getting to Know You - song from the movie "The King and I"

Whether you are creating a 2 page proposal or a 20 page proposal – the steps end up being the same in writing a successful proposal.

In some ways the effort is the same when you are applying for \$2000 or \$200,000 – though people offering \$200,000 tend to be more instructive in what they want in an RFP. If the RFP is only for a small amount but has huge demands, it may just be wishful thinking – stick to your standards and only offer what you can fulfill in the given budget.

Learn all you can:

- Visit their website
- Study their Annual Reports
- Look at their brochures or information packets
- Google them for news articles

Getting to Know You - song from the movie "The King and I"

Getting To Know You"

Music by [Richard Rodgers](#)

Lyrics by [Oscar Hammerstein II](#)



Getting to Like You

- Getting to hope you like me
 - What do you “like” about the match between their values, needs and what you have to offer
- Figure out what steps you would take
 - What tasks to carry out for each step



Getting to Like You

- Put the tasks in order
 - Develop a timeline; critical timeline
- What resources will you need
- Develop a cost estimate




Getting to Know You

- Putting it my way, but nicely
- Pulling it together
 - If the RFP has an Evaluation – scoring system
 - match your writing energy to the value of the score



Writer's Block – Fear of Starting

- Free form writing
 - Resist the urge to edit
- Getting your main points down on paper
 - Editing a draft is far easier than editing a blank page
- Edit when you reach a natural break in your rhythm

- 
- **Don't** create a proposal template and use it the same way each time
 - **Do** follow the instructions of the client –
 - follow outline
 - answer questions
 - respond to all pieces of an RFP



Introduction

- Introduce the organization
 - One paragraph statement if possible
- Provide **brief** background information
 - Don't get carried away
 - Do emphasize what they want to see



Project Summary

- Present a concise summary of the project idea and its most important key benefit



Needs/Problems

- Identify the needs or problems to be addressed
 - What is the problem?
 - How significant is it?
- Back up with statistics/research if available
- **Don't** spend too much time on the *problem*
- **Do** outline the specific solutions you can offer

Goals/Objectives

- State goals and objectives – if the client has not
- **Don't** describe your work only in generalities, use buzz words, or trendy concepts...unless....
- **Do** list concrete, specific outcomes and tie each step of your plan to achieving the goals

State the desired goals and objectives to address the needs/problems – if the client has not

Don't describe your work only in generalities, use buzz words, or trendy concepts – unless that client has used them

Do list concrete, specific outcomes and tie each step of your plan to achieving the goals – if you can't tie it to a goal...there's a problem

Buzz works – trendy concept = Our “authentic” organization/approach/services

A caution:

Don't try to change your organization to fit a funders guidelines

Do stick to your business, be honest, and focus on where your goals genuinely align with a funders – don't be afraid to stretch, just don't let the money drag you away from what it is you want to do

❖ **Objectives** should be *SMART*: Specific, Measurable, Achievable,

Realistic, & Time Sensitive

❖**Example #1:** In 12 months, there will be a 50% reduction in unintended pregnancies among 17-18 year old girls who live in Richmond City (& participate in the project). ***Realistic? Achievable?***

❖**Example #2:** In 12 months, 75% of teen program participants will demonstrate increased knowledge about healthy sexual behavior, contraceptive practices & prevention of sexually transmitted diseases.

List the Key Benefits

- State the benefits of working with your plan
- Use “If-then” thinking:
 - Example – **If I provide this background research to them in a useful format, they’ll be able to plan their activities for the coming years (based on good evidence) and defend these decisions**
 - *Benefit statement to client – Having research information formatted for easy access speeds up the planning process and provides a useful resource for upholding decisions to your donors.*

If-then thinking: **If** we provide {specific service}, **then** you will be able to {achieve a specific goal}.

Be specific.

Tell exactly what you are going to do.

Tell why you need to do it.

Tell how you are going to do it.

Tell what makes your approach different from other applicants.

Be enthusiastic! Be passionate!



Layout Your Procedures

- What will be done?
- To what/whom?
- By whom?
- When will they do it?
- How will they know that they're done?

Be Realistic about What You Can and Cannot Do

- If your organization is weak in a needed skill area, don't try to fake it
- Offer what you can: 50% of *something* is better than 100% of *nothing*
- Find someone that has strength and partner with them

If your organization is weak in a needed skill area, don't try to fake it – but be confident in what you can offer

Offer what you can: 50% of *something* is better than 100% of *nothing*

Alternately - find someone that has strength and partner with them – being in a co-working site, like the Queen Street Commons, makes it easier to find people to work with

Don't Assume Anything


- Spell it out
 - How you interpret what they are asking for
 - What you mean by {name a process here}
- Common sense is just not that common

Spell it out

How you interpret what they are asking for – to perform an asset map and gap analysis, I will...

What you mean by {name a process here} – to optimize your search engine capacity, I will

Common sense is just not that common – for example, don't assume that they understand that creating a final report usually means 2 drafts and then a final paper



Work Plan

Break project into phases and present timetable for each phase of work

Week	Description	Responsibility of:	Milestones/Critical Items/Deliverables
1			
2-4			
5			

Week – could be actual dates

Description – just a brief outline of what will be happening

Responsibility of - don't forget to note "their" jobs in all of this

Milestones, Critical Items, Deliverables -

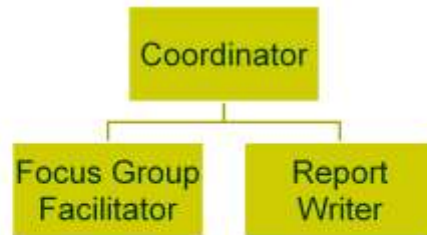
Budget

- List proposed costs and budget of project
 - **Don't** neglect the budget – give enough breakdown to allow for options
 - **Do** realize that many reviewers read the budget first

Don't neglect the budget – give enough breakdown to allow for options: client may not have a budget to hire you for it all but have enough to try you out on something

Key Personnel

- Outline the key personnel who will be involved





Evaluation

- Discuss how project success will be evaluated
- Identify how you will know if you've been successful



References/Endorsements

- References
- Provide endorsements from other individuals or organizations, if available

Nice to Have

- Title Page
 - should include: date, project title, project location, your/organization name; and any required information
- Table of Contents
 - make it easy for readers to find the information they require
- Appendices
 - Might include: cv's, material lists, diagrams, and letters of support

Title Page

should include: date, project title, project location, your/organization name; and any required information (RFP #)

Table of Contents

make it easy for readers to find the information they require – RFP? Show the required titles

Appendices

Might include: cv's, material lists, diagrams, and letters of support

Editing

- Look at funder's evaluation standards
 - reference them in the proposal
- Cover all the points in an evaluation
 - not just the ones you're comfortable with

Good proofreaders are
worth their weight in gold

Remember that other human beings will be reading your proposal. People, who just us, may struggle to stay focused when reading hundreds of pages of proposal writing.

Good proofreaders don't read for content and will point out every little mistake – this is important as some funders will see a mistake and assume that if you can't pay attention to the details than you won't do a good job for them.

Don't be offended by a proofreaders suggestions – don't take it personally, think of it as helping you make it through the cuts



Formatting

- How would you like to see this if it came to you?
- Maximize white space
- Paragraphs should be no more than 6 lines long
- Create variety through use of different paragraphs, lists, and subheadings
- Indicate changes in topic with highlighted subheadings



Format for Ease of Reading

- 2 fonts are best and use a “serif” type for the body of printed proposals like this
Bookman Old Style
- All lists should be in bullet form
 - “Bullet Sandwich”
- Use a general to specific pattern
 - Subheadings and introductory sentences
- Use tables and graphs – where appropriate

Stick to a font like Arial for online reading



Not Making the Cut

- Applicant did not follow directions
- Proposal did not match the program or need
- Late submission
- Narrative too long
- Fonts, margins, spacing too small



Not Making the Cut

- Signatures, certifications missing
- Budget or narrative missing
- Insufficient number of copies
- Inappropriate binding

More than half of proposals are rejected on first reading because:

- Applicant did not follow directions
- Proposal did not match the program or need



You Can Do This

Go for it – if you know how to get the job done and you can layout a plan, you can write a proposal with a little advice and guidance

Vicki Bryanton

vicki@vickibryanton.com

www.vickibryanton.com