Proposal Development Outline & Supplementary Tips
BUS 698 & 699 – Post University Capstone Project
Developed by Susan Lapine, used with permission for Post University

Proposal Components
The major headings to be used in writing a proposal are shown below, in bold, in the proper order. Additional headings may be included. Certain proposed projects may require a change in the headings and/or a change in the order used, if substantiated. The bulleted points below each major heading are intended to provide guidance for what and how content should be presented in the related section. Remember...the sections build upon and are related to one another!

Executive Summary
• Gives a preview of the main points of the proposal, in the same order as in the main body. Most often this is the last element of the proposal to be written, after all other sections are developed.
• Includes at minimum one sentence each on
  o Problem/Innovation
  o Goals/Objectives
  o Methods/Strategies/Approach
  o Management Plan
  o Evaluation
  o Cost
• Is brief, clear, interesting and compelling for target audiences
• Briefly captures the main selling points of the project
• Compels the reader to want to review the proposal
• Is jargon-free

I. Introduction
• Gives a high level, general overview of the project
• Describes the organization to which the project is being proposed
• Describes the organizational (and beyond, if necessary) context for the proposed effort
• Leads logically to the problem statement
• Is brief, interesting and free of jargon

II. Problem Statement/Needs Assessment/Innovation
• Relates to purposes and goals of the organization
• Is of reasonable dimensions and scope
• Is supported by statistical evidence
• Is substantiated by statements from authorities/research
• Is stated in terms of the organization’s/client’s needs and problems
• Is developed using input from the clients and/or organization
• Makes no unsupported assumptions
• Is interesting and jargon-free
• Builds a compelling case

III. Program Goals & Objectives
• A goal (one or more) is a broad statement of the project outcomes and results. Each goal should relate to a problem, need or innovation committed to in the Problem Statement/Needs Assessment/Innovation section.
• For each goal, develop at least one or more objectives. Objectives are the outcome steps needed to accomplish each goal. Each (set of) objective(s) should be clearly tied to the related goal.
• Uses S.M.A.R.T. objectives
  o Specific (What? Why? How?)
  o Measurable (If cannot be measured, it cannot be managed. Measures whether/not successful)
  o Attainable (Reachable, yet with sufficient stretch)
  o Realistic (Do-able in terms of scope, resources, etc.)
  o Time-bound (Set target timeframe/s)
• Describes the population, programs, etc. that will benefit

IV. Methods/Strategies/Approach
• Each (set) is clearly tied to the related problem, goal(s) and objectives
• Describes project activities proposed, with rationale, including research
• Describes target and other audiences to be involved, in which activities, and how
• Presents a realistic scope of activities able to be managed within the timeframe and resources required of the project.

V. Management Plan
• Lays out the sequence of proposed activities/Gantt chart
• Describes required staffing/management of the project
• Presents and substantiates other resources required of the project
• Includes timeframes to be managed, clearly tied to the other elements of the Management Plan
• This section is amenable to a table format

VI. Evaluation Plan
• Lays out a plan for evaluating to what degree the goals and objectives will be achieved
• Establishes criteria for success
• Includes a plan for evaluating/adjusting methods throughout the project
• Describes the who (with criteria), how and when (milestones/timing) of the evaluation
• Describes methods and use of data/gathering, any instruments or surveys
- Explains the process of data analysis
- Describes any evaluation reports or documents, their distribution

VII. Financial Portion of Plan
- Presents all financial assumptions of the proposed project
- Details the same story as the body of the proposal
- Identifies the financial model(s) to be used and properly executes the model
- Assure itemized costs/benefits are consistent with stated assumptions and model(s)
- Includes all items and costs required of the project
- Details how each cost item was derived (supported by research)
- Includes volunteer/in-kind costs
- Separates and details salary and fringe benefit costs
- Includes all consulting costs, with rates and how derived
- Itemizes and details all non-personnel costs
- Includes indirect costs, where applicable
- Is adequate to conduct the tasks laid out in the narrative

Appendices

Reference

Supplementary Tips for Generic Proposal Writing

Steps in the Proposal Development & Writing Process

A. Survey Needs
B. Develop Idea
C. Identify funding source (or potential funding sources)
D. Review literature/programs (e.g., BUS 698 Annotated Bibliography)
E. Develop proposal coordination plan
F. Write Proposal (NOTE – See Proposal Components below)
G. Review Proposal
H. Submit Proposal
I. Solicit comments/modify/negotiate
J. Reject → Redesign or Approval → Do it!

How to Survey the Needs of the Person/Organization to Receive Your Proposal

Prepare
☐ An agenda
☐ What do you want to know?
☐ Probe the who’s, what’s, why’s, & how’s
☐ What is the best method to collect data?
☐ How is each interview question best stated?

Ask, Listen, Note
☐ Their terminology & ideas
☐ Problem or need areas
☐ Scope & potential of the project
☐ Constraints (e.g., time, $, resources, etc.)
☐ Probable time frames
Get Feedback
- On your ideas & plans

Write
- From their point of view
- Using their terminology & ideas

Considerations in Developing the Idea
- Uniqueness (what & how)
- Organization’s ability/capacity (who & where)
- Needs (why & who)
- Expected outcomes (what)
- Outside endorsement (who & how)
- Length of Project (when)
- Financial requirements (how much)
- Evaluation measures (how)
- Product after project’s end (what)

Tips on How to Write Proposals

1. Aim your “pitch” at one individual or one smaller group/team. Try to visualize that person or team.

2. Write in third person (It’s easier to brag about “they” than “I”).

3. Select an appropriate (and interesting) title of 10 words or less. (NOTE – Don’t be cute or hammy.)

4. If the proposal is long (longer than 10 pages) prepare a table of contents.

5. Be liberal with headings and sub-headings, to make it easy to read and to emphasize important points.

6. Keep your paragraphs short, and present only one thought per paragraph.

7. Accentuate the positive. Emphasize “opportunities” rather than “needs.” Donors would rather know “where it’s at” than “where it isn’t.”

8. Beware of “ify” and “hopeful” statements. Write in active voice. Be positive!

9. Beware of professional jargon, abbreviations, acronyms, and vague references.
10. If you have trouble getting started, begin with the financial section.