

Technical Proposal

Definition :

- We may define a proposal as a written offer to undertake a project for designing, creating something new or for changing or modifying an existing procedure, method, system or structure within a specified period of time.

Purposes

- Solve a problem.
 - Alter a procedure.
 - Find answers to questions.
 - Offer advice and training.
 - Conduct research on a topic of interest to both the parties.
 - obtaining commercial contracts
- .

Importance of Proposals

- Proposals , like reports, are valuable records of information.
- Act as index to company's growth.
- Successful proposals give financial returns to the organization.
- Help promote research activities.
- Win contracts for the company.
- Proposal writing develops useful skills such as communicative, persuasive and organizational.
- Enhances power of estimation, judgment and discrimination in a writer.

Types of proposals

- **Formal and informal**- according to structure.
- **Internal and external**- according to the nature of its audience.
- **Solicited and unsolicited**- according to the source of origin.

Formal and Non-formal proposals

- **Non formal** gives brief description of suggestions and recommendations (introductory in nature).
- Are short and initiate small projects
- Printed forms. Memo format or letter format.

- **Formal proposals** are longer.
- To initiate big projects.
- Require elaborate description and discussions.
- Use of manuscript format.
- Several sections and sub-sections.

Internal Proposal

Within the organization.

- To request or implement change
- Reorganizing departments, expanding facilities, reducing budgets, improving procedures.
- Request policy changes or approval for funds.

With internal proposals, you may not have to include as qualifications or much information.

External

External Proposals

Are written to audiences outside of your own organization.

May be preceded by an Executive Summary.

May be a response to a RFP (request for proposal).

Solicited

Are written in response to a request for a proposal (RFP)

Are usually written according to close specifications dictated by the audience.

Unsolicited

Written without any request for proposal.

Are initiated by the organization that is attempting to obtain change or funding.

Are designed to convince the audience that the change or funding is in the best interest of both parties.

Examples

- A **Sales Proposal** is designed to convince the customer that the purchase of the proposed products or services will solve a problem, improve operations or offer benefits.
- A **Sales Proposal** should sell solutions to problems rather than equipment or services.
- A **Grant Proposal** is a request for funding to start or continue a project.
The project may be research, a new facility, a beneficial activity or curriculum, or any other plan that requires funds to initiate or complete.

More examples

A **Business Plan** is a proposal designed to present a business to potential investors—banks, etc.

A **Policy Proposal** is a proposal that requests a change and plan of action in policy or laws.

PERSUASIVE WRITING

- *Proposals are informative - educate the reader*
- *Persuasive writing -to convince that reader to do something.*
- *believe that the solution is practical and appropriate-
(the case is built by the demonstration of logic and
reason in the approach taken in the solution).*

– **AIDA PLAN** –a formula of effective sales communication

- **Attention** is caught towards what is being proposed
- **Interest** is created by pointing out how the work will be executed.
- **Desire** has to be generated to accept the proposal by highlighting the benefits and advantages
- **Action** is induced by persuasive reasoning

Letter of Transmittal/ statement of request

- Date
- Name of the proposer
- Designation
- Organization name
- Name of the addressee
- Designation
- Organization name
- Subject:.....
- Sir
- In response to your advertisement in The Times dated 7th may'05 I would like to submit a proposal enclosed herewith.
- I shall be thankful to you if you will kindly let me know the status of the proposal at the earliest.
- Yours faithfully
- Sign
- Name
- Designation
- Enclosed: Proposal

Important preparatory Q,S

- WHAT you are proposing?
- HOW you plan to do it?
- WHEN you plan to do it, and
- HOW MUCH it is going to cost?

- **Structure**

- The **INTRODUCTION** presents and summarizes the problem you intend to solve and your solution to that problem, including the benefits the reader/group will receive from the solution and the cost of that solution.
- The **BODY** of the proposal should explain the complete details of the solution: how the job will be done, broken into separate tasks; what method will be used to do it, including the equipment, material, and personnel that would be required; when the work will begin; and, when the job will be completed. It should also present a detailed cost breakdown for the entire job.

- The **CONCLUSION** should emphasize the benefits that the reader will realize from your solution to the problem and should urge the reader to action. It should be encouraging, confident and assertive in tone.
- Facts must lead logically and inevitably to the conclusion and/or the solution presented. Evidence should be given in a ***descending order of importance***, beginning with the most important evidence and ending with the least important.

Proposal Elements

- Cover page
- Summary or abstract
- Problem statement/needs assessment
- Goals and objectives/specific aims
- Methodology/research plan/management
- Qualifications/resources/technical plan
- Evaluation
- Budget and budget justification

- Letter of Transmittal/ statement of request
- Title Page
- Project Summary (approx. 200 word abstract)
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THE PROPOSAL

- Introduction Body
Project Proposal: (Includes Statement of the Problem, Proposed Solution(s), Program of Implementation, Conclusions/Recommendations)
- Conclusion/Recommendations
- Bibliography and/or Works Cited Qualifications (of writer(s) and/or project implementers)
- Budget
(Itemization of expenses in the implementation and operation of the proposed plan, and detail of materials, facilities, equipment and personnel)

- Title page

A
Proposal
For
TITLE

Submitted to

Name of the recipient

By

Proposers name

Designation

Name of the organization

Date

Summary or Abstract

- Crucial first impression.
- Summarize all important information from proposal (self contained).
- Anticipate concerns and address briefly
- project—what problem (what is the basic situation?)
- what opportunity is there for improving things?
- Convey enthusiasm
- Write it last

Problem or Need Statement(**WHY**)

- Identify and define problem or need.
- Indicate importance or significance- **BY**
Citing examples, statistics, etc. (show work done and its inadequacy in present circumstances)
- Relate to sponsor's mission or goal.
- Don't take for granted that the reader will know what's on your mind. (Thorough)
- Define scope and limitations of project.

Project Goals and Objectives

- Address need or problem statement
- Desired outcomes (what extent)
- Brief, focused, to-the-point, measurable and achievable.
- No more than two to five objectives
- Each should flow logically to the next
- Should be listed in terms of long and short term goals.

(Reinforces advantages by making realistic comparisons and links benefits to needs)

Management plan (Methodology)

- Describe activities to be undertaken & why
- Describe staffing & sequence of activities
- Provide evidence of planning (time & task chart examples)
- Reasonable scope and projected completion.
(timeline of projected completion of milestones with dates of reports' submissions)

The proposal audience uses it to decide whether you are suited for the project. Therefore, this section lists work experience, similar projects, references, training, and education that shows familiarity with the project.

- **Qualifications**
- **Demonstrate to the reader that you are capable of doing what you propose.**

The proposer has to convince the authority concerned that he or his organization is fully qualified in all respects to do the proposed work.

- **Describe project director's qualifications & expertise.**

Most proposals contain a summary of the proposing individual's or organization's qualifications to do the proposed work. It's like a mini-resume contained in the proposal. The proposal audience uses it to decide whether you are suited for the project. Therefore, this section lists work experience, similar projects, references, training, and education that shows familiarity with the project.

Technical Plan-recommendations and proposed solutions

- Describe technically how the proposal would solve the problem.
- Available resources, including key personnel & technical resources.
- Describe organization, its purpose, goals & programs & project administration
- Offer statistics & endorsements.
- Discuss the theoretical or analytical experiments to be followed by you.
- Specify the instruments, equipment and materials that would be needed and how all they be utilized.

(Longest and Persuasive section, logically structured)

Budgeting

- **Itemize & account for costs**
- **Budget should flow from your project plan**
- **Justify budget items.**

These should include the amount required for the following items: material, equipment, computer time, lab testing, salaries of the people involved in the work, travel, infrastructural facilities such as land, building, water, electricity etc.

- **The estimate should be realistic and logical.**

Don't overestimate resource needs

Don't underestimate resource needs either

Bibliography

- It refers to a descriptive list of sources which have been consulted to write an article or a report. Information for bibliographies is taken right from the source.
- It includes all the sources- books, journals, magazines, websites, articles etc.
- Organized alphabetically listing the authors name in the reverse order.

Books

- Okuda, M., & Okuda, D. (1993). *Star trek chronology: The history of the future*. New York, NY: Pocket Books.

Name of the author (sir name and first initial)

Full stop

Date or year (1970).

Name of the book : Italics

Place of publication :

Name of publisher.

Journal Article:

- Devine, P. G., & Sherman, S. J. (1992).
Intuitive versus rational judgment and the
role of stereotyping in the human condition:
Kirk or Spock? *Psychological Inquiry*, 153-159
- Authors
- Date
- Title of the article
- Title of periodical in italics
- Page no's

- AESTHETICS CHECKLIST

1. Does the cover express something of the content of this proposal or the nature of your organization?
2. Is there a Table of Contents?
3. Is there a title page with all necessary background information describing this document?
4. Is the summary no more than 3/4 of a page long?
5. Does the organization of the proposal enhance the content and make it easy to find/avoid types of information?
6. Are the margins consistent?
7. Is the pagination accurate?

8. Did you use a consistent type-style?
9. Is the copying high-quality?
10. Did you narrate footnote ?
11. Did you use color coding?
12. Did you avoid unnecessary charts, tables, diagrams?
13. Is the binding neat and attractive?
14. Has it been reviewed for spelling/grammar/diction?
15. Is the typing accurate?
16. Are the section-headings clear and consistent in format?

The Review Process

- Process varies by sponsor.
- Remember - reviewers may not have expertise in your field, may not share your interest and enthusiasm for the project, may be overworked and underpaid.
- Key point: Make your proposal easy for the reviewer to read

Key Points to Remember

- Project planning is key
- Project should fit overall goals or plan
- Place your project in context of the other work in the field
- Discuss your expected results
- Anticipate problems in the project and propose alternative strategies
- Write with reviewers in mind
- Budget should fit your project plan

Common Reasons for Rejection

Mechanical Reasons

- Submission deadline not met
- Guidelines not followed *exactly*
- Incomplete or unclear descriptions of one or more elements
- Highly partisan positions on issues
- Poor writing quality
- Carelessness and inattention to detail

Reasons for Rejection continued

Methodological Reasons

- Lack of originality
- Methodology unsuited to purpose

Personnel Reasons

- Unfamiliarity with field
- Unqualified to perform work

Cost-Benefit Reasons

- Not agency priority for this year
- Unrealistic budget
- Costs out of proportion to potential benefits

Preparing for the next time

- If not funded, don't give up!
- Ask sponsor for reviewer's written comments, if available
- Ask if it would be worth submitting another proposal in the future
- When revising, be responsive to reviewer comments

Reviewers look for:

- A “doable” project (resources, approach)
- A project worth doing
- Systematic, logical development of ideas
- An easily-read, accessible proposal

Appendices

- Secondary materials are put as appendices in a proposal.
- This maintains continuity of logical progression and avoid distractions.

Proposal

A sales letter written in a technical way- using technical writing skills.

Write, revise, revise

Get feedback from colleagues