

Winning Proposals: Audience, Goals, and Tasks

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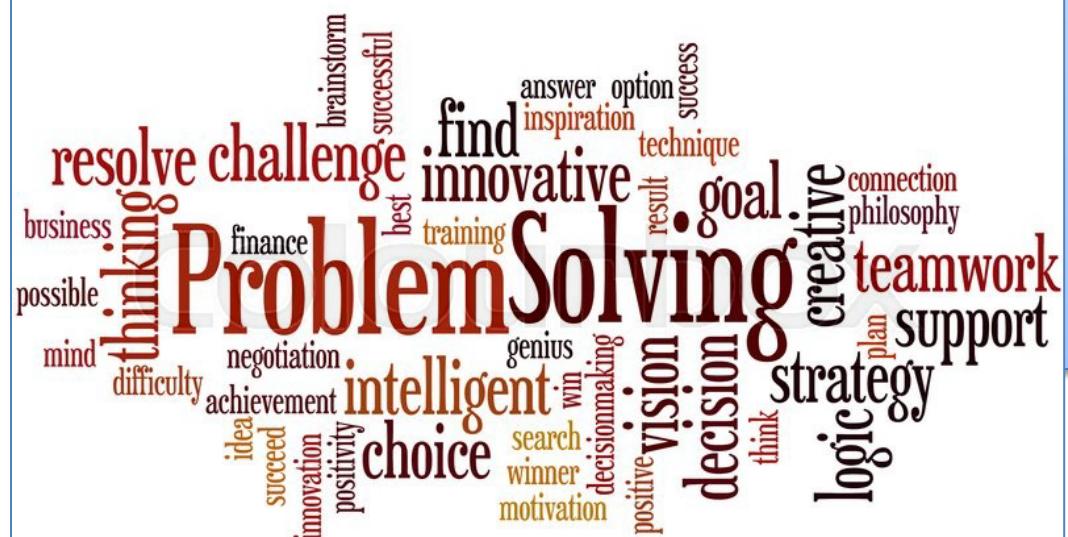


University of Victoria

Humanities



<https://blog.stickytickets.com.au/are-you-writing-winning-event-proposals/>





The New York Times

The photos in this presentation, taken by **Charles Ebbets** in the early 1930's for *The New York Herald Tribune*, depict daily scenes of workers who constructed New York's skyscrapers between 1920-1935

The photos form part of a collection of 11 million historical photographs and include some of the best-known historical images of the United States

Currently, the collection belongs to Corbis Images, owned by Bill Gates



PAUSE, LEARN, REFLECT



Starting as early as 1901, many of the workers responsible for building New York's towering skyscrapers came from First Nations communities, mostly Mohawks from the Six Nations of the Iroquois – a largely forgotten historical detail, as historian Daniella Burton points out.

For instance, according to Burton's blog, three of the men pictured in this well-known photograph are of Mohawk descent. More recently, of the 500 workers involved in constructing the Twin Towers in 1968, 200 were Mohawk.

Read Burton's [blog here](#) to learn more about the decades-long tradition of employing Mohawk construction gangs in the building of New York's incredible skyline – up to and including the new Freedom Tower, since renamed the One World Trade Center (b. 2006-14).





The next slide shows workers today cleaning the windows of New York's skyscrapers, with full safety harnesses in place – the result of someone (or a team) writing a proposal!

**Once you Learn to
Write Proposals – you
Can Change the
World!**



Take Steps to Review, Learn, Record, Recall

As you go through these slides, take notes: be prepared to complete a

“Report Back” Reflection Activity in the Discussion Forum

You’ll be asked to explain 3 important details about proposals that you learnt from going through these slides and share these with your classmates



Image Source: <https://taylorinstitute.ucalgary.ca/>

Learning Outcomes

The first step to producing a winning proposal is to learn what proposals do and how to organize one. After going through these slides, you should be able to

1. Define what's meant by an **RFP**
2. Explain the **main goal, function, or outcome** of a proposal: what it's meant to achieve or **deliver**
3. Describe **who** requests (and reads) proposals and to what end or **purpose**
4. Recognize that proposals function as **legally-binding** documents

Module 4 will get you familiar with the **different sections of a formal proposal**, so you can set one up to meet genre expectations for a proposal

Apply these basic **genre conventions** or **templates** to help you lay out a winning proposal!

We are a Proposal-Making Species!

Making proposals is intrinsic to **human nature**

Whether in the workplace or at home, we make all sorts of proposals every day in an attempt to achieve our goal of making things better—for ourselves, our friends, and our community!

Hence when **writing a workplace proposal**, you are simply tapping into a **natural human activity** . . .

The basic goal of . . . **WHICH IS?**

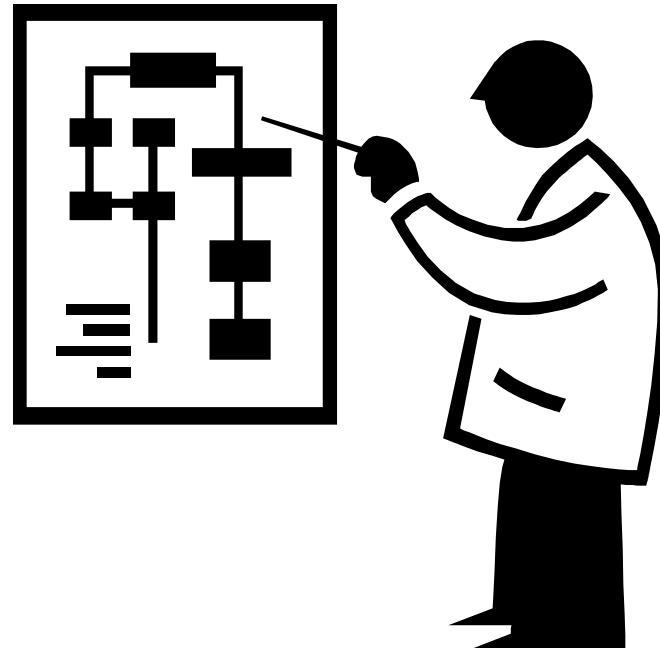
Basic Goal → To Make Things Better – to Improve!

**To suggest changes that will
pave the way to better things . . .**



Follow Procedures to Generate a Winning Proposal

You can take steps to make sure your proposals are the winning kind of proposals . . .



**Follow procedures!
Strive to meet genre
expectations as closely as
possible**

FIRST STEP: Understand what a Proposal Is and Does

A proposal is a document which presents a **Plan of Action** in response to an **RFP**

It requests permission to **implement an idea** or a **service**, or a **design** intended to improve or remediate an **unsatisfactory situation**

A proposal offers to undertake a project—to **carry out a change**—designed to result in definite and worthwhile **improvements** to a currently troubling, problematical, unsatisfactory situation

RFP = Request for Proposals



RFP's are Common in the Technical Workplace

Companies and organizations have **money to spend** on consultation, research, and problem-solving

They put out calls (RFP's) to experts to help them solve their problems

In response, experts submit proposals: a request for that money (**funding**) to undertake a particular project



By Submitting a Proposal . . .

. . . You recognize **something's wrong:**
things aren't as good as they could be!

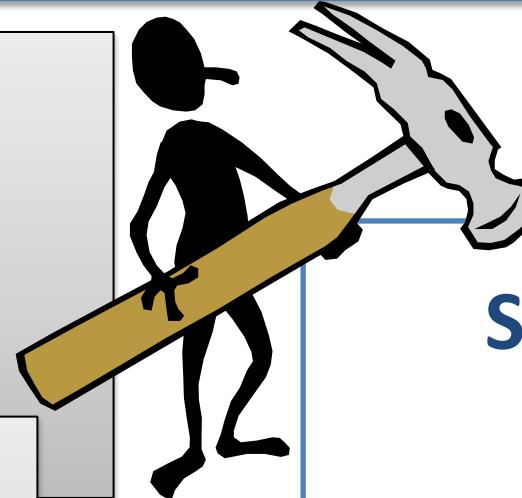
There's a **problem**



... You Undertake to Solve a Problem!

Proposals are, first and foremost, **Problem-Solving** documents

They respond to a **gap** that exists between
What is and
What SHOULD be ...

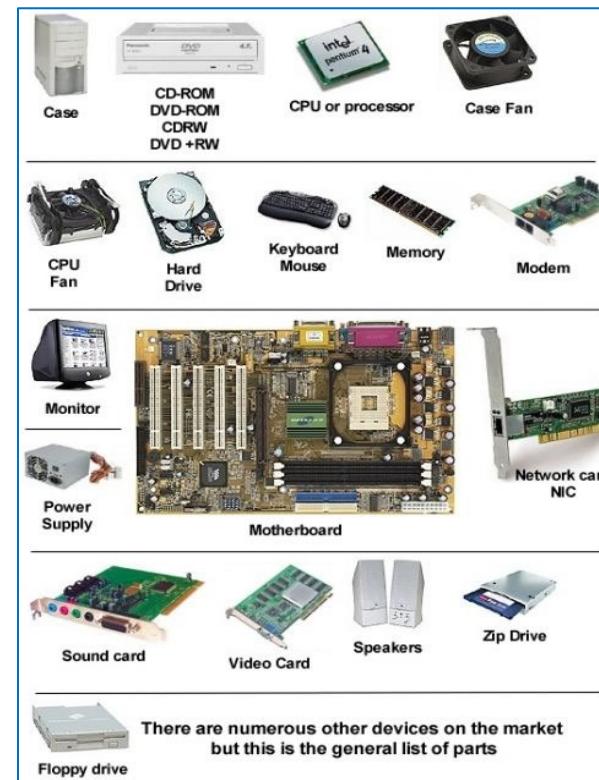
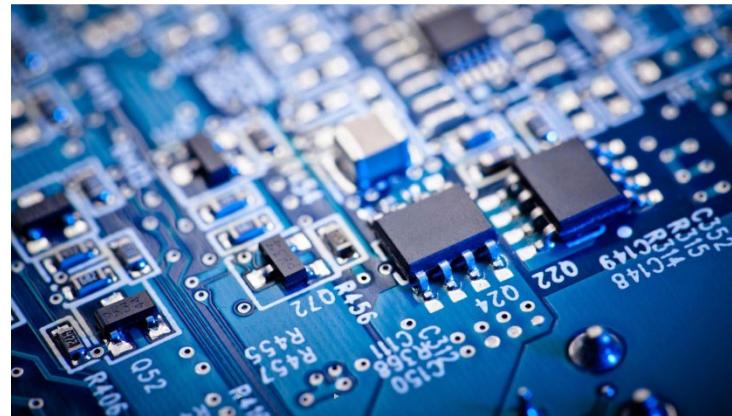


Something needs **fixing!**

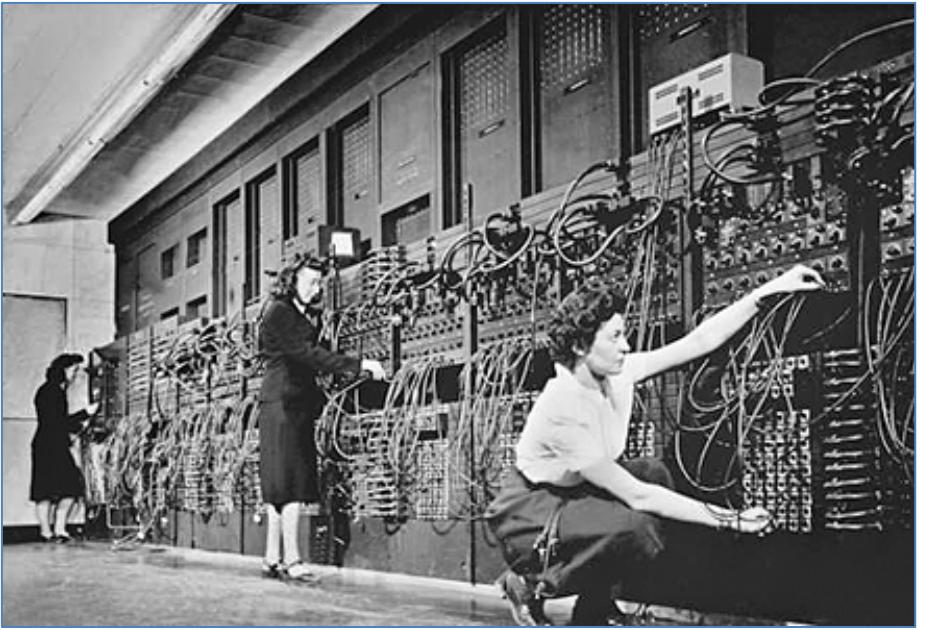
A proposal aims to remedy an **unsatisfactory situation**

New and improved!

The Design Solution may Be a Product

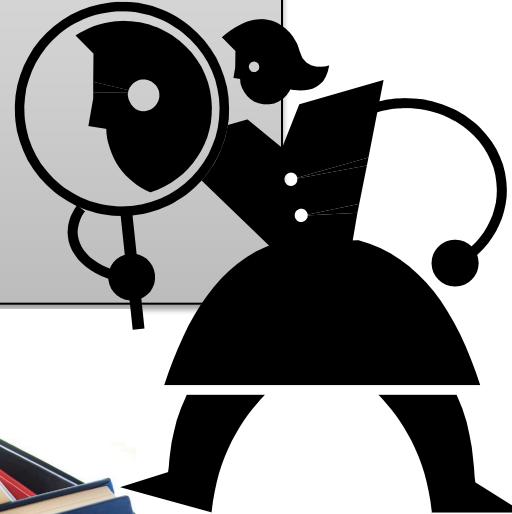


... Or it may be a Service

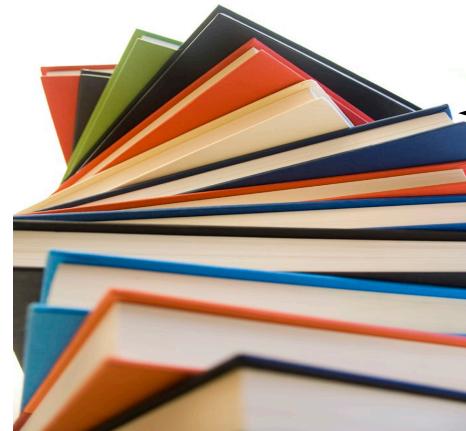


Maintenance or Technical Support; Consulting Services

- Advice
- Investigation
- Research
- Repair
- Troubleshooting



research noun
careful study or investigation of facts or information
research (say ri-sər'ch) verb
researching, researched, researching, researcher



All Problems are Opportunities for Improvement!

Every **problem** is an
opportunity to make things
better!

A proposal presents clients and other stakeholders with a way to **solve a currently troubling** or **unsatisfactory** situation



AND requests funding to do so . . .

Who Reads Proposals and Why?

Proposals are submitted to, read by, and acted on by
DECISION-MAKERS . . .

Not necessarily technical experts, but those who have
authority to spend money – people who
allocate budgets and decide what to spend it
on, either as individuals or as organizations:

- **governments**
- **companies**
- **committees**
- **municipalities**
- **city councilors**
- **corporations**
- **bosses**
- **executives**, etc.



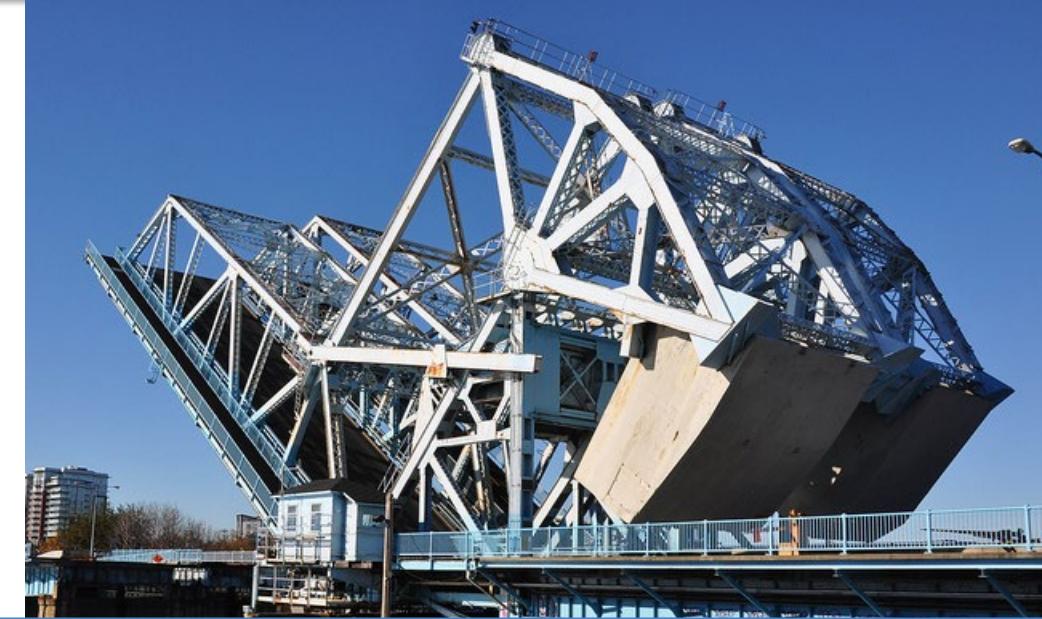
Decision-Makers Need Help—they Rely on Expert Advice

For example, the City of Victoria needed **expert advice** to help determine how best to proceed with the aging Johnson St. Bridge:

- **OPTION 1: Repair Bridge**
- **OPTION 2: Replace Bridge**

Victoria City Council had to make a decision, but lacked technical know-how to determine best steps

An **RFP** was issued, calling for engineering consultants to conduct a **structural assessment** of the bridge and report back to Council with advice on how to proceed: either repair or replace



Consulting structural engineers responded to the RFP with a **proposal** offering to **investigate** the condition of the bridge and, based on their findings, determine the **feasibility** of either option, with a **recommendation report** as the final deliverable

Proposals Provide Clients (Decision-Makers) with Solutions

In response to the **RFP**, engineering consultants presented Victoria City Council with a formal **Proposal**: in this case, a **Plan of Action** for investigating the structural integrity of the bridge

Once City Council accepted the proposal, engineers undertook to do what they'd laid out to do in the proposal: they investigated the condition of the bridge, then submitted a **recommendation report**, advising Council how best to proceed: repair or replace

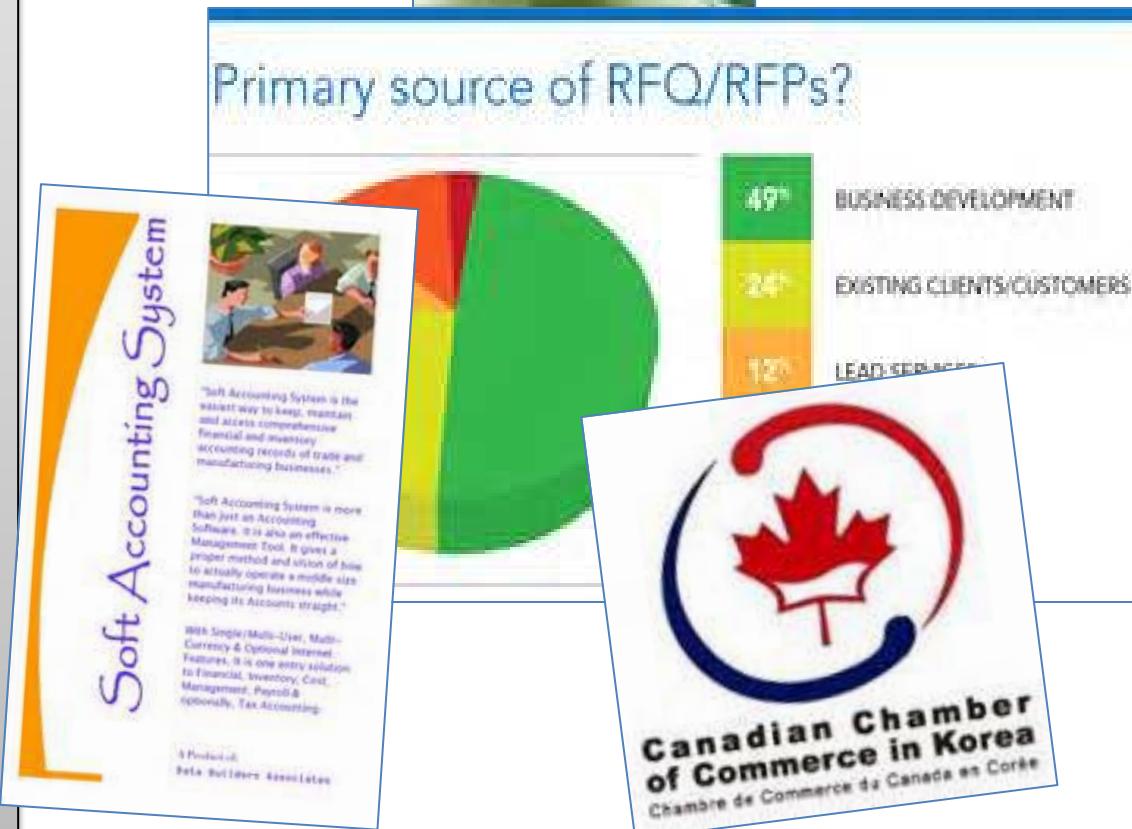
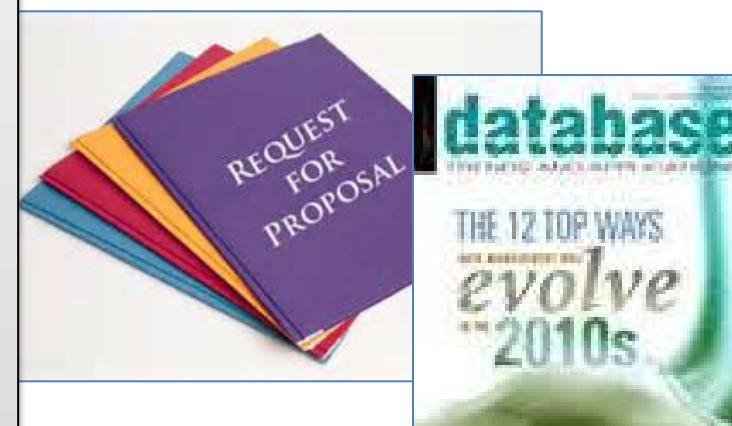
Armed with expert technical information from structural engineering consultants, Victoria City Council could now make an **informed decision** as to how to move forward

In much the same way, you'll respond to the **RFP** issued by your course client, producing a **proposal** that offers to investigate the **feasibility** of the proposed **design solution** you're offering your client

Where are RFP's Issued?

Companies, governments, and organizations send out **public announcements** requesting proposals (bids) to carry out specific projects that need doing

These public announcements — called a **request for proposals (RFP)**—are issued through the internet, newspapers, trade journals, Chamber of Commerce channels, individual letters, etc.



RFP's Set out Explicit Rules and Procedures

RFP's often establish **strict protocols** in terms of what is to be submitted

3.3. No Faxed Or Electronic Proposals

Proposals received by fax or email will not be considered.

2. PROPOSAL CONTENT

Proposals (one original and two copies) must be submitted in printed form. The following should be included in a proposal, in the following order.

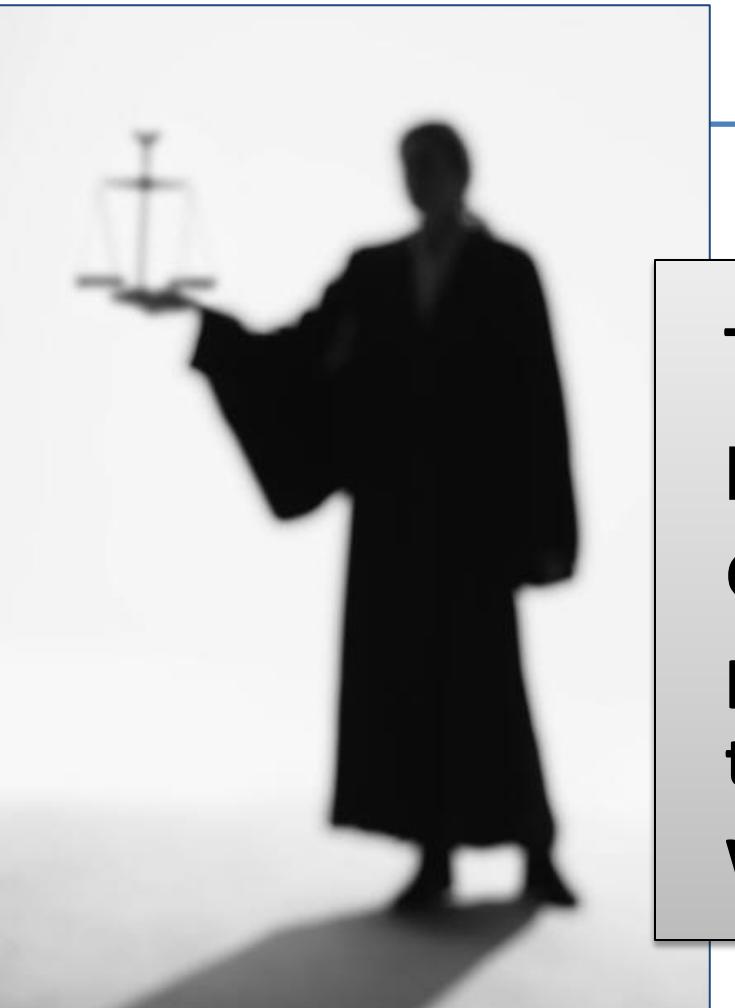
2.1. Covering Letter

A covering letter signed by an authorized representative of the proponent, outlining the proposal and stating that the information contained in the proposal accurately describes the services to be provided.

**Successful
proposals
work hard to
closely
follow
instructions!**

Bear in Mind a Proposal is Also a Legal Contract

Once a proposal is written and submitted, it becomes legally binding



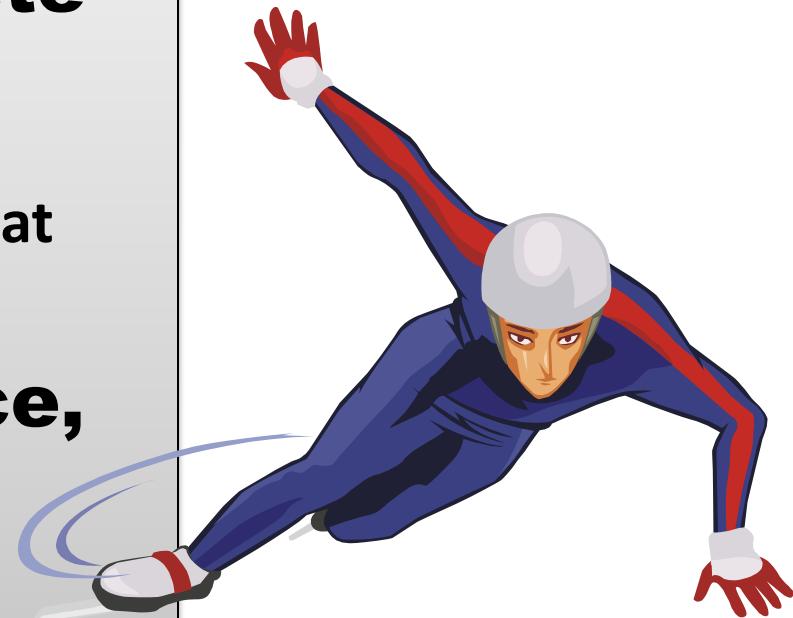
The proposing individuals—or **proponents**—are **legally committed** to do what the proposal says it will do, in the amount of time stated, at the given cost (usually within 25% of estimated budget)

Proposals are Persuasive AND also Competitive!

As a successful proposal writer, you'll have to **outcompete** all other submitted proposals – there may be many dozens!!

When writing, your job is to **convince** the client that your proposal is not only good, it's the best!

It offers **the best design, method, advice, or product** for remedying the situation



The Village intends to select the proposal that it considers most favourable to the Village's interests. In this regard, the Village considers that "Best Value" is the essential part of engaging a service provider and therefore the Village may prefer a proposal with a higher cost, if the Village considers that it offers greater value and better serves the Village's interests.

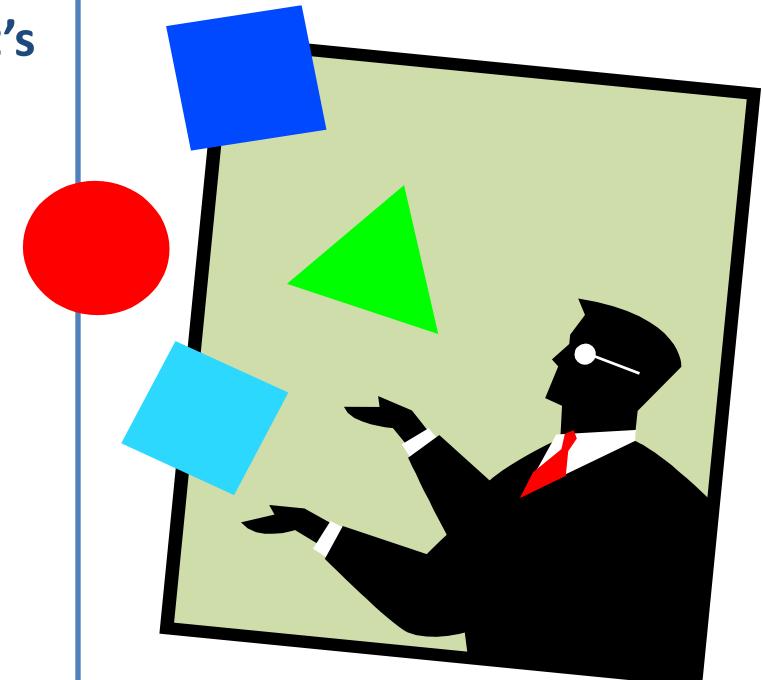
How do you Create a Competitive (Winning) Proposal?

To **convince** a **client** and other **stakeholders** that the design, product, or service you're offering is not only a good one, **but the best one for the job . . .**

. . . You need to **PLAN** and **WRITE** from the audience (**CLIENT's**) perspective

Audience analysis allows you to meet a client's

- Needs**
- Goals**
- Preferences**
- Values**
- Priorities**
- Concerns**
- Budget**



Govt. of Canada Issues Audience Analysis Guidelines!

PLAN – STEP 3 - Preparing for the Client Meeting

Needs Analysis Process

A conversation with a client has several phases.

- **Exploration:** An exploration of all of the relevant background issues; needs that must be met, efforts to resolve, people and technology involved, demands, constraints, etc.
 - **Facts:** What happened/ is happening – what, where, when, who, how?
 - **Concerns:** What is the client concerned about? What does the client need?
 - **Motivation:** How motivated is the client to start doing something? To get their needs met?
 - **Commitment:** What is the client committed to doing? What is the client lacking the commitment to do?
- **Action:** What action is the client willing to take to move forward?
 - What specific steps are necessary?
 - By when?
 - Who else will be involved?
 - What are the barriers?
 - How will you overcome those barriers?
- **Results:** Based on the plan for action what results does the client envision achieving?

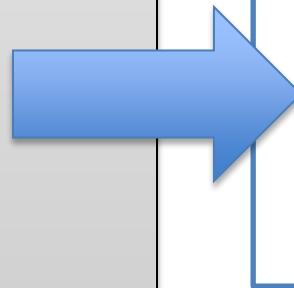
If you want to write successful proposals (and win exciting contracts for yourself and your company!) you'll need get into the habit of always considering your **audience**, i.e. your **client**

Ask questions and identify their specific **needs**

Go Through Audience Analysis: It's all about the Client!

Find out what you can about your
client's background:
workplace goals, values,
culture, and mission

- Previous projects
- Personnel
- Current financial status
- Problems, worries, or concerns
- Willingness to embrace innovation, spend money, cut corners, etc.



RESEARCH

Learn about your client:
what they want, what they
need, what they value—so
your proposal
can address these directly

TAKE STEPS TO LEARN

Meet with the client, talk with
the client, ask the client
questions, take notes, explore
their website, read relevant
documentation

Word of Warning . . .

CAUTION: When dealing with municipal and other government-issued RFP's, **you are not allowed to directly contact the party placing the RFP!**



Solicitation of Council Members

Proponents and their agents will not contact any member of the District Council or District staff with respect to this RFP at any time prior to the award of a contract or the termination of this RFP, and the District may reject the Proposal of any Proponent that makes any such contact.

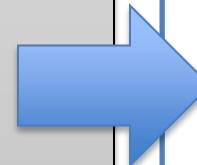
Discover Avenues for Learning about the Client

What avenues could you pursue to find out about a client you are not allowed to contact directly?

- Ask people who know about them
- Go to their website; check mission statements, personnel or directory pages, previous projects, About Us pages, and so forth
- Check professional networking sites
- Other ideas?

Ask Questions to Lead to a Winning Proposal

- How can I show my client I understand the problem?
- How can I show that I can deliver what they need?
- How can I make my plan of action—my proposed design solution—appealing?
- How can I show I understand my client's needs and concerns?
- How can I best present my capability to undertake this project?
- How can I convince them to give me the money to go ahead?



Look through the sample Audience Analysis worksheet under Module 2 on Brightspace!

Take Steps to Make your Proposal a Winning One!



A key way to answer all the questions on the preceding slide is to go through the **steps** and **procedures** for **writing** a formal proposal

These **steps** are part of the **“procedural knowledge”** you learn by completing this course!

Follow the given **Writing Prompts under Module 4** to guide you in composing each the section of a formal proposal

Thanks for Going through these Slides!

Bring any questions you might have to class

At the same time, be prepared to complete a “Report Back” Reflection Activity in the Discussion Forum, where you’ll be asked to explain 3 important details about proposals that you learnt from going through these slides



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