

Writing a good quality proposal

1. Introduction

If you want to write a good quality proposal you have to carefully consider two things: make sure that you know what should be in the proposal and pay due attention to how you present these contents.

You need to have a good understanding of what is exactly expected, not only in terms of the subject matter of the project or assignment, but also in terms of any formal requirements the donor may have regarding the submission of proposals. However, only giving the right contents and following all formal instructions is not enough. The way in which you present your proposal will also influence your chances of winning a contract.

2. Know what is expected

The first step to take before you actually sit down and start writing the proposal, is to read carefully the Terms of Reference and/or other documents provided by the donor or contracting authority. Make sure they are complete and that you understand them properly. If not, ask for clarifications.

The documents provided usually contain three types of information:

1. Information regarding the project, usually given in the Terms of Reference. They describe the service to be rendered and usually contain information about:
 - the background of the project;
 - objectives to be achieved;
 - activities to be undertaken;
 - method or approach to be used;
 - required expertise;
 - logistics and timing;
 - monitoring and reporting requirements.

2. Formal requirements for the submission of a proposal. like:
 - the language in which the proposal has to be written;
 - the currency in which the financial offer has to be expressed;
 - a format for the budget;
 - a format for CVs;
 - whether a variant solution is allowed (an alternative to the solution as described in the Terms of Reference);
 - whether, and in what proportion, sub-contracting is permitted;

- the maximum budget available for the contract;
 - submission date and address for submission;
 - contact details for requests for clarification.
3. Information regarding rules and regulations to be followed in case the proposal is approved and a contract is signed, for example
- a copy of the contract is included in the documents;
 - reference is made to the law under which the contract has to be carried out;
 - general and specific conditions for contract execution are included or referred to.

It can also be that you yourself take the initiative to submit a proposal to a donor. In such a case it will be advisable to make inquiries beforehand about what type of projects this donor funds and under which conditions.

In writing your proposal you have to abide by all the requirements the donor makes. It is really a waste of time, money and energy if a proposal is rejected because it is incomplete. If your proposal does not follow all the formal requirements, there is a great chance that the donor will not even start looking at your proposal's technical contents.

In the annexes you will find a number of checklists that can be useful as reminders in the preparation of your proposals.

In your proposal, refer clearly and regularly to the information you received from the donor. Make clear that you have understood and give your understanding of the needs.

Search for the balance between being comprehensive, critical and creative, but in doing so always follow the documents you received.

3. Consider the reader(s) of the proposal

Once you have made sure that you understand what is expected, both regarding the project at hand and the formal requirements, the next step is to consider the person(s) that is (are) going to read and evaluate your proposal. For smaller assignments it may be just one person, or an evaluation committee the members of which all have a similar, less specialised, background. For bigger projects there usually is an evaluation committee. For complex projects you may assume that at least one of them will be a (technical) expert in the field concerned.

The members of an evaluation committee are not necessarily highly specialised persons. For example, a representative of a line ministry may be well aware of the general principles of the topic concerned, but know less about the technical details. Often you find a mixture of generalists, technical specialists and maybe even financial specialists in the committee. Each of them looks in more detail at specific parts of the proposal: compliance with rules and regulations, the technical offer and the financial offer.

You have to try and keep your readers in mind all the time while writing and to convince them that you are the right organisation or consultant to execute the contract. In other words, your readers will for a large part determine how you are going to present the contents of the proposal.

4. Presentation of contents

In the presentation of the contents of your proposal attention should be paid to the readability, appropriateness and appearance of the text you write. These three aspects of the writing process are explained below.

4.1 Readability

In short, readability refers to the style of writing. Readable proposals have a clear, easy to understand set-up, meeting the expectations of the reader.

Try to have an idea of the level of explaining detail that is required. You should not be too specialised in approach nor underestimate the readers' knowledge and experience. In the extreme, both can come across to the reader as very annoying.

For the same reason, do not use jargon of which you can know that the reader will not understand it. Better still, use the terminology as you find it in the Terms of Reference or other documents provided.

Concerning the style of writing readability means writing in clear language. Try and keep it:

- *short*: in words, sentences and paragraphs
- *simple*: straightforward and to the point
- *strong*: concrete, avoid too many passive sentences

Especially large proposals are often written in teams, either in-company or in a consortium, with each team member writing different sections.

Make sure you discuss beforehand with all team members which points should be dealt with in which section.

Appoint one person for the final editing to see to it that:

- the same terminology is used throughout the proposal,
- the same style of writing is used throughout the proposal,
- all the donor's requirements are covered,

This way, you can make sure that the proposal becomes a complete and comprehensive document.

4.2 Appropriateness

Of course, the proposal you write has as its first objective to convince the donor or contracting authority that you are the best organisation or person to do the job. So most probably, the text will be full of assertions, claims and promises. However make sure that they are appropriate.

Do not make your offer too obvious an attempt to sell your product. Make sure that you can live up to the expectations you raise. Do not be pretentious and most of all, do not resort to misrepresentations. In the end, if you cannot perform once awarded the contract it can, first, cost you a lot of money, and secondly, you may lose your credibility with the donor concerned, spoiling your chances for the future.

Keep the evaluation criteria in mind and do not overstate.

6.4 Appearance

The proposal you write is not only a commercial document in which you state your capabilities, it is also a frontpiece for your firm that will be interpreted to reflect the character of the writer and the firm he or she represents.

Therefore, take much care of correct grammar and spelling and a proper layout. Avoid a careless and sloppy appearance of the documents you write. Use formats correctly where-ever required.

Pay special attention to your financial offer. Check it over and over again. Budgets are often drawn up in phases and arithmetical errors are easily made.

Points of attention in writing a good quality proposal

- Identify the (type of) readers of the proposal
- Use the donor's terminology (as in the information received)
- Write clearly, keep it:
 - *short* in words, sentences and paragraphs
 - *simple*: straightforward and to the point
 - *strong*: concrete, avoid too many passive sentences
- Keep the evaluation criteria in mind
- Be sure that you can live up to the expectations you raise
- Check your proposal on grammatical and spelling mistakes
- Check your financial offer on arithmetical mistakes
- Follow the format strictly
- Avoid a careless appearance of documents

Checklist to be used on receipt of the donor's dossier

| Receipt of the dossier from the donor | remarks |
|--|---------|
| Is the dossier complete? (Usually a table of contents is provided) | |
| What is the deadline to send in requests for clarification? | |
| What is the address to send requests for clarification to? | |
| Will a meeting be organised to give clarifications? If yes, when and where? | |
| What is the deadline for submission of the proposal? | |
| What is the address for submission? | |
| If you are writing with a team: are the tasks clearly divided (do the team members know for which part of the proposal they are responsible)? | |
| If you are writing with a team: has it been discussed with all team members what points are to be dealt with in which section? | |
| If you are writing with a team: have you appointed a final editor? | |
| ANY OTHER CHECKS YOU NEED TO MAKE? | |

***Please note that this checklist serves as a reminder only.
Read the dossier carefully to see if any other checks are appropriate!***

Checklist to check formal requirements

| Formal requirements | remarks |
|--|---------|
| What is the language to be used? | |
| In what currency has the financial offer to be expressed? | |
| To what extent is sub-contracting allowed? | |
| Are variant solutions allowed? | |
| What is the maximum amount available for the contract? | |
| Which of the following documents are required? Is there a prescribed format to be used? | |
| <ul style="list-style-type: none"> • tender guarantee | |
| <ul style="list-style-type: none"> • tender form or prescribed content for the cover letter | |
| <ul style="list-style-type: none"> • (copies of) original documents defining the constitution and/or legal status, and establishing the place of registration and/or statutory seat. • <i>in case of consortia: one for each consortium member</i> | |
| <ul style="list-style-type: none"> • statement that the firm is not in any of the following situations: bankruptcy, suspension of payment, legal proceedings involving an order to suspension of payment, convicted of crime or offence in professional conduct, guilty of misrepresentation in an invitation to tender, in breach of contract with the contracting authority on another contract. <i>in case of consortia: one for each consortium member</i> | |
| <ul style="list-style-type: none"> • reports on your accounting and financial standing as required <i>in case of consortia: one for each consortium member</i> | |
| <ul style="list-style-type: none"> • company profile justifying your technical qualification to supply the services required <i>in case of consortia: one for each consortium member</i> | |

| | |
|---|--|
| <ul style="list-style-type: none"> in case of consortia: description of areas of complementarity between the partners and a specification of the inputs to the project for each of the responsibilities for provision of personnel and back-up support | |
| <ul style="list-style-type: none"> experience record <p><i>in case of consortia: one for each consortium member</i></p> | |
| <ul style="list-style-type: none"> curricula vitae | |
| <ul style="list-style-type: none"> for consortia, the confirmation of association and designation of a lead partner, signed by all consortium members | |
| <ul style="list-style-type: none"> for sub-contracting, a statement regarding the context and extent of sub-contracting foreseen and the identity of the sub-contractor. | |
| <ul style="list-style-type: none"> statements on the availability of experts, signed by each expert concerned | |
| <ul style="list-style-type: none"> statements on the language skills of experts, signed by each expert concerned | |
| <ul style="list-style-type: none"> fixed format for price breakdown | |
| <p>ANY OTHER CHECKS YOU NEED TO MAKE?</p> | |

***Please note that this checklist serves as a reminder only.
Read the dossier carefully to see if any other checks are appropriate!***

Checklist to be used before submission of the proposal

| Submission of the proposal | remarks |
|--|---------|
| Has the proposal been checked on spelling mistakes? | |
| Has the financial offer been checked on arithmetical mistakes? | |
| Does the lay-out of the proposal look neat and tidy? | |
| How many originals are required? | |
| How many copies are required? | |
| Is the tender reference number and title clearly stated on the envelopes? | |
| Is it clearly stated on the envelope that it is 'not to be opened before tender opening session'? | |
| Has the financial offer to be submitted in a separate envelope? If so, have the instructions on how to do this been followed? | |
| Will there be a public session in which the envelopes are opened? If so, when and where? | |
| ANY OTHER CHECKS YOU NEED TO MAKE? | |

***Please note that this checklist serves as a reminder only.
Read the dossier carefully to see if any other checks are appropriate!***