

Guide – How to Write a Proposal

What is a Proposal?

First, let's define what an organizational proposal is. Within Center of The Golden One we currently define a proposal as a written plan or recommendation put forward by an individual, department, or group of people for consideration or discussion by the CEO and the Executive Team. If there is a need for input from Spiritual Leadership, the Executive Team will seek this out as part of its review process. Spiritual Leadership may ask for required additional information.

Why Write a Proposal?

The purpose of writing a proposal is to give decision makers a comprehensive overview of your recommendation. Most recommendations require an integrated approach and may impact/affect many areas of the Mission. For the implementation of a recommendation to be successful it needs thorough consideration. We need to consider sourcing, human resources, organizational priorities, budgets, timing, and alignment with the organization's spiritual focus.

A thorough proposal accomplishes some important outcomes:

- Provides you with a structured way of thinking through what is needed to accomplish your proposal.
- Causes you to reach out to the organization to gather input from others about the impact your proposal may have on them and what they may need to put in place to be successful in supporting the proposal.
- Provides a comprehensive overview to anyone who reads it about what is really required to implement this within the organization and the expected outcomes.
- Expedites the review process.
- Sets the foundation for a successful implementation.

When to Write a Proposal:

A proposal is needed in a variety of different situations. Some examples may be:

- A new Event
- A new Program
- A Department Project
- An Organizational Development/Change
- A College Course
- A Special Project
- A Task Force for a particular purpose/focus
- Changes to existing practices (new insurance carrier, new vendor, etc.)
- Changes to existing approved department policies (e.g., Chicken Soup or Death Announcements).

Some of the main indicators a proposal is needed are:

- It is proposing something that falls outside of the clearly defined existing responsibilities, approved goals, and/or projects of a department.
- Its implementation requires additional funds, volunteer time, Center resources.
- It is significantly changing how we do our day-to-day business.
- It is a stand-alone project or a new initiative for the organization.
- It affects a budget.

Pre-Proposal

In some circumstances it may not be clear whether it is even worthwhile to spend the time and energy to write a full proposal. For that instance, we have a process called a “Pre-Proposal”.

The purpose of a Pre-Proposal is to gain input and/or approval to move an idea or project forward before time and resources are committed.

A Pre-Proposal allows decision makers an opportunity to give initial input and direction. For example:

- Yes, take the next steps to create a proposal.
- No, for a specific reason.
- Maybe, but not now, raise again in the future.
- Reconsider from a different perspective.

There is a separate Pre-Proposal Form to complete and submit to your Executive Supervisor. Please follow the instructions at the top of the form.

Short Communication Form Instructions:

If your request or recommendation is relatively simple and straightforward, you may fill out the Short Form Proposal. This form is much shorter and will take less time to complete, while still providing the needed information to assess whether or not the organization should move forward with your request. Instances when this approach may work include recommendations for something previously accomplished within the organization or internal departmental changes.

Although it may be easier to take this approach, it is important to really consider whether it is appropriate and if you will be including all the relevant information needed to make a decision. If you have any doubt, use the Long Form Proposal template.

Long Form Proposal Instructions:

The Proposal Form is structured in a way to guide your **thinking** for a more complex request that may impact many parts of the organization and requires extensive resources to accomplish. A comprehensive and detailed proposal will expedite the review process and set the foundation for a successful implementation.

You will need to work closely with your Executive Supervisor to finalize your proposal for review. Once your proposal has been submitted, you may be asked to provide additional information or to make a presentation to the Executive Team and/or Spiritual Leadership.

Below are details on how to think through and complete each section of the Proposal Form.

Section 1: Basic Information

The basic information section provides an overview of who is submitting the proposal and the responsible parties for implementing it, if the proposal is approved.

Many proposals might be written by two department supervisors. Please include that information in this section.

Core Team is defined as the team “driving” this request/project forward – they want it to happen and will have at least some responsibility in implementing the proposal. Bottom line, they own this proposal and its success.

Section 2: Purpose and Desired Outcomes

This section helps the reviewing parties understand the big picture --the purpose and the ideal outcome that this request/project will produce.

This is not the place to go into every detail of your recommendation, but rather to give a succinct explanation of what you are suggesting.

It is also important to include any type of background information that is necessary or helpful for the reviewer to have a better understanding of the context from which this proposal is being written. Sometimes a proposal is written in response to spiritual direction or sourcing, a specific need, problem, or opportunity. If such a circumstance exists, please describe it briefly in this section.

Section 3: Sourcing or Direction from the Founders

Please include any sourcing or direction from Gourasana, Kalindi or The Lady that is informing your proposal. This may be in the form of sourcing documents or direction from The Lady via recording, letter, and/or notes that you have written up and sent in.

Your document should state how it is in alignment with the sourcing, or whether the proposal is deviating from sourcing. You can summarize your explanation in your own words in this section; however, please **list the documents you are referring to** as reference. You can always contact Trinity at trinity@miracle.org to ask for sourcing related to a specific area. Should your proposal be based on direction from The Lady, include when and how you received this direction. Have the documents ready for reference upon request.

Section 4: Spiritual Leadership

In this section, describe the help or involvement you may need from spiritual leadership. For example, do you need meditations led, support from Freedom Walk leadership through their monthly Freedom Walk Path calls, etc.

Section 5: The Details

This section will help you write out the details of your proposal.

Type of Proposal:

Determine the type of proposal you are writing and select it from the list. If you are unsure which type to select use “Other” to describe it in your own words.

Details of Your Proposal:

This section is where you can provide the essential information of your proposal to help the reviewer make any needed decisions. You do not need to provide the finer details that are required in implementation but do specify the **key points** and **needs**. Perhaps writing it in an outline form will help. Make sure you practice A to Z Communication, including all information that will be relevant to consider the proposal.

One question to answer is whether there are, or if you have considered, alternative ways to accomplish your desired outcome. For example, would we do the project ourselves or be able to hire a 3rd party to implement it? Or perhaps there are two very different ways to go about solving a problem, but you are proposing one way over the other. In those instances, it's good for the reviewer to know what options you have considered.

Audience:

It is important to identify the “audience” for your proposal. Who will benefit from the results of this proposal? This section might not always be clearly defined, and it's okay to select multiple audiences. For the reviewer it is helpful to see whether a proposal is geared toward internal operations; for example, a specific department, or one/both of our two Paths, or other participants, or the public.

Key Departments:

Identify the departments that need to be included in the planning and ultimately execution of the proposal. This is different than the Core Team who is driving this proposal.

The important question here is – whose participation do you need to implement this proposal successfully? This might be only a handful of people from your department or may include people from other departments and teams. Use the extensive list on the Proposal Form to evaluate this section thoroughly.

Thinking through this section will also help you identify whether you are missing anyone on your Core Team and/or reveal who else you need to get information from before submitting your proposal.

Timeline:

Things to consider in creating a timeline include desired start date, anticipated end date, and whether there are any important milestones along the way. A **milestone** is a significant target date to complete an action or portion of the proposal.

It is important to mention if there are any time constraints to be aware of; for example, a roof shouldn't be replaced in the winter, or your proposal is time sensitive for an upcoming event. Include in this section any information you think is helpful for the reviewer to understand.

Budget:

It is necessary to create a budget before submitting your proposal. Be sure to include information like:

- The expected cost of the project.
- Is the cost included in an annual budget?
- Is it a new expense?
- Is there a discount if paid in full upfront?
- Can we set up a payment plan?
- Are there ongoing subscription or annual maintenance costs? *If you are not clear about ongoing costs, but you think there will be some, please state that.*

In some cases, there might be different cost options; for example, going with one vendor over another. If so, please explain your how you came to your decision and your conclusion/recommendation.

Goals:

Briefly describe how this proposal relates to our Center's Mission Statement or our Founder's sourcing, direction, or teachings. For example, Kalindi gave very specific sourcing about the area of Emergency Preparedness.

Other things to consider might include how your proposal relates to the Center's overarching goals or department specific goals.

Please note: It's okay if a proposal does not necessarily relate to currently established goals. However, when it does, it's good to explain that relationship. And when the proposal doesn't relate to current goals, it's good to acknowledge that as well. This can be written in a few simple sentences.

Related Documents:

Are there any related documents that will accompany this Proposal Form? This might include outlines, timelines, past programs, teachings, recordings. These documents will help the reviewer have more detailed background or explanation for consideration. These should be listed and available on request.

Submitting Your Proposal:

Once you have completed the Proposal Form, **submit your proposal to your Executive Supervisor** who will bring it to the Executive Team for consideration.

Please know that it may take a few weeks to receive an answer to your proposal. Together with your Executive Supervisor you may determine it is best to request time to verbally present your proposal in addition to submitting it in written form.

Section 6: Proposal Review

After reviewing your proposal, the Executive Team might want to meet with you to ask further questions or discuss certain aspects of your proposal in more detail.

Once the Executive Team has made their decision, your Executive Supervisor will return your Proposal Form with written input from the Executive Team and may give you next steps to help you move towards implementation. This may include submitting a more detailed outline of your implementation plan.

If the Executive Team decides your proposal is not approved, or it is not the right time, your Executive Supervisor will return your Proposal Form with written input and suggestions from the Executive Team.

Remember, it is important to work closely with your Executive Supervisor all along the way so they can help guide and direct you, not only with submitting your proposal, but also to support you in its implementation and/or next steps.

Thank you.