

## Helpful Hints for Crafting Your Proposal

We have compiled helpful reminders, hints and items to consider when preparing your proposal. These considerations and suggestions are drawn from CASE materials and other sources. They are intended as starting points and all of them will not apply to every proposal situation. For additional support, please contact the Office of Development Communications and Stewardship.

### **Know Your Audience**

A proposal should never be a surprise to the recipient. It should be delivered after getting to know as much as possible about the prospective donor and their areas of connection and affinity. Before you craft a proposal, you should be asking yourself a lot of questions. For example, what does the donor value and what spurs their excitement? Be sure your research demonstrates that you know and care about their history, priorities and interests, and how those align with NC State's goals and needs. Try, as well, to steer clear of any known trouble points and topics or potential landmines.

Proposals should be as focused and specific as possible – not offering a full buffet but a single course or two. Knowing the donor's giving history and capacity is critical to pitching your ask at the appropriate level. It may be appropriate to provide a very limited number of option levels, but be sure they are real options and not created simply for the proposal, with your true desired option sandwiched in between them. You don't want to come away vastly underfunded or overfunded for an option you didn't necessarily want to pursue.

A proposal (or any donor communication) should be as highly tailored as possible. Consider whether a case statement, slip sheet or other material is more appropriate at this stage of your conversation, or if you are truly to the point of offering a specific proposal.

### **Remember: It's Not Just about Us, It's about that Donor**

Speaking of conversation, the proposal is a little more about the donor or prospect and less about us. It can be tempting to fill a proposal with statistics and statements about all of the ways which NC State is great. Some of that material (along with, certainly, the ways NC State is unique) is entirely appropriate. But don't forget to empower the donor to become the hero that they want to be.

Help them see themselves in NC State's story. How can they have an impact? Give them a problem to solve, an opportunity to seize or value to add. Be clear about how this proposal might meet their own goals to make a difference, advance a field of inquiry, honor their own life experience or create a legacy. Know, recognize and connect with their motivations, the broader context of their giving and their level of comfort with their philanthropy being public. (Is there a naming opportunity involved?) Give them a real WHY for supporting the university.

Furthermore, why *here* and why *now*? Describe why NC State is the best place to make this investment, but don't oversell without evidence. Be cautious about any superlatives or absolute adverbs such as *best*, *most*, *always* and *never*.

For most donors, philanthropy is both science and art. A mix of factual or statistical data and more personal or emotional appeals is appropriate. Knowing your donor should give you an indication if tilting much more heavily in one direction is clearly preferable, and an indication of appropriate length and formality.

### **Parts of Your Proposal**

One size doesn't fit all. Proposals will vary, but consider a structure similar to that below, adjusting to fit the particular circumstance. (A proposal to a single donor may tend to be shorter, for example, while one to a foundation, board or corporate team is likely to be longer and more complex.)

The Campaign Toolkit includes a Proposal Sample Template and a document with sample Campaign proposal language. (Although every proposal is different, weaving in language highlighting the Campaign and its priorities, and about NC State, with information related to your more specific area of need, can be effective.)

- **Cover letter or email.** Do not treat this as a complete afterthought, as it's the first thing the prospect will read. It doesn't need to be long, but spend a little time making it clear, and be sure to recognize and appreciate past support or interaction as well as their time and consideration.
- **Title page or section.** Includes the word *proposal*, the donor's name and the date. The Campaign logo should be here or elsewhere on the document.
- **Introduction.** It may be appropriate to include 1-2 paragraphs about the university as a whole and how your college/unit and/or proposal fits in, at the beginning or conclusion.
- **Executive summary,** 1 paragraph. A brief, sharp and to-the-point description of the opportunity/need to hook attention. This short statement summarizes the area or project under discussion, its importance and the support needed to make something happen or advance (problem, solution and opportunity for the donor to make an investment). The rest of the proposal will provide greater detail.
- **Overview/the goal,** 2-6 paragraphs. The meat of the message (including any critical context or background) about the specific college, program, etc., that you are asking the donor to support. What are the goals and objectives, and what makes your topic important? Share a few recent accomplishments and/or ways this area has helped create economical, societal and intellectual prosperity. Detail how you are supporting students, faculty or outreach. As appropriate, share your vision, aspirations, external or independent endorsement and rankings. Consider what has already been invested, in terms of finances, human resources, equipment, infrastructure, marketing, partnerships or in-kind gifts that might be useful to mention. What is about NC State's leadership, track record, expertise, capacity, existing partnerships and programs, etc., that ensures it can be even more successful in this realm?
- **The need or opportunity,** 1-4 paragraphs. Explain what more can be done to meet objectives or to address challenges, with the prospect's support. Provide examples of unmet need. Why is this opportunity important for NC State and for our wider world? Describe what's necessary to make things happen – for example, more staff resources, more up-to-

date facilities or more financial support for students. Who are the beneficiaries and stakeholders? What are the main issues or key activities? Is this a new program or an expansion? What might happen if funds aren't received or this need isn't addressed?

- **The ask**, 1-2 paragraphs. Throughout the proposal, you will talk about the need for support, but don't forget to make a direct ask or invitation for a financial contribution of X that will achieve Y. Don't bury the lead!
- **The impact/expected results**, 2-4 paragraphs about how this specific gift will impact students, faculty, the college, the program, NC State, the public, etc. How does it help meet strategic goals? How could it impact a time line or ensure stability or sustainability? How does it change lives? How would it generate excitement, add to momentum or inspire others? What would the donor truly help NC State achieve with their gift? Can you cite the experience of a beneficiary of a similar gift in some way within your proposal? If appropriate (especially in longer proposals), break out specific line items for an overall budget, expected milestones or measures of success. You will not need details to answer all of these questions in the proposal but likely should be prepared for followup questions.
- **Closing**, a few sentences. Bring everything back to the donor, the Campaign and NC State, along with your gratitude for the prospect's consideration.
- **Include contact information** for key staff such as the dean, department chair and/or program director, as well as the development officer.
- For longer proposals, use **appendices** for more expansive information on personnel, budgets, time lines, risk management, evaluation, etc. Cross reference these in the proposal text to make it more likely that someone will read them.
- Don't forget the **back cover** or inside cover page, if appropriate. Remember that a printed piece doesn't always end up on a desk facing upward. If your material seems to fit on an odd number of pages, don't neglect the chance to feature something like a striking photo or a message from the dean on the back.

### Reflect the Brand

Most proposals are being shared with very busy people who might need a little enticement to read them. Don't underestimate the value of a professional presentation in grabbing their attention. A proposal should be immediately identifiable as coming from NC State and reflective of the university brand in personality (courageous, innovative, intellectual and purposeful), editorial style and look.

Realize that prospects are likely receiving other university materials and communications, and your proposal should be harmonious with them while reflecting your area's personality as well.

- Always include a Think and Do the Extraordinary Campaign lockup. The Campaign website URL is also great to include, along with any websites related to the proposal's topic, in the proposal or in the cover email or letter.
- Use Univers and Glypha fonts (used in the Toolkit's editable PDF proposal template), or Arial if those are unavailable. (This document's style, using Arial font, 1.15 line spacing and no paragraph indentation) is another baseline for NC State documents done in MS Word or Google Docs.)
- Consider your paper and printing quality, or your digital presentation. Will the proposal go inside a case statement, a different kind of folder, stand alone, etc.? Make sure you leave time to get printing and production correct.

- Consider whether an appropriate photo, graphic, simple chart, statistic, university icon or pull quote or two might make the proposal more eye-catching, add to the overall narrative and atmosphere, illustrate or reiterate a complex or important point, or stave off visual boredom with a quick stopping point.

Visit <https://brand.ncsu.edu/>  
<https://brand.ncsu.edu/campaign-toolkit/>

### **Check Your Work**

Set aside your draft for a brief period of time. Then come back to it and read through with fresh eyes, considering:

- Is there anything missing or anything that feels unnecessary? What information does the donor really need? Have you overwhelmed them or left out key context by assuming what they know?
- Does anything seem confusing? Have you avoided overly long sentences and paragraphs, jargon and excessive use of acronyms (especially ones you don't explain)?
- Have you scanned for the use of vague words including *it*, *that* and *is*, and strengthened them where possible?
- Is the presentation attractive and easy to read and understand?
- Have you used a few nontextual elements appropriately?
- Does the proposal look like it came from NC State?
- Is there a powerful core mission, engaging vision and/or inspirational feeling? Have you given the recipient a confident reason WHY they absolutely should support the university? Have you answered key questions listed earlier in this document?
- Do you feel the balance between data and stories is correct? Have you included impact and people, and remembered that proposal is about the donor and not just NC State?
- Have at least one other person review your draft proposal briefly in an objective way, for clarity, context, excessive jargon or confusing acronyms, assumptions about pre-existing technical knowledge, unsubstantiated claims and obvious or major unanswered questions. When writing, you may not see the forest for the trees.
- Don't rely solely on your computer to check spelling and grammar. Carefully proof a printed version of your draft – mistakes can be easier to overlook on a screen.
- Are there other materials that you should include along with the proposal? (College or university case for support, endowment slipsheet, program brochure, etc.?)