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Chapter 5

Refining Your Project

In the last chapter we discussed strategies for choosing an organization with which to work and acquiring a general sense of the project you'll pursue with that agency. In this chapter we'll give you some suggestions for clarifying the details of your collaboration with that agency, including selecting the kinds of documents you'll produce and creating a plan for accomplishing your work in a time frame that's suitable to you, your instructor, and your agency representatives. We will introduce you to an important document genre in technical and professional communication—the **proposal**—and give you suggestions for using this writing assignment to help you carefully plan the work you'll do throughout the course term or unit.

Assessing Strengths and Comparing Schedules

Whether you're working in a collaborative group or on your own, the first step to refining your semester project is assessing your strengths and skills. In Chapter Six we recommend a group-management strategy that involves regular board meetings, or somewhat formal group discussions during which one group member takes notes and records your shared decisions for future reference. Depending on your instructor's approach, these notes may fit into a **field journal,** a document genre we'll discuss in the next chapter. The group members' responses to the strengths survey below would be a good topic for your first board meeting. Identifying your individual and collective strengths will not only aid you in getting to know each other, but will also help you to begin thinking about how your collaboration process might work, what kinds of projects you can take on together, and even how you might distribute tasks and leadership responsibilities. All of this is useful invention for the **management section** of the proposal you will write.

Begin this assessment by making a list of the abilities and skills that you know you could bring to the project. What skills and areas of expertise did you emphasize in the résumé you sent to the organization? What writing, writing-related, technical, and transferable skills have you developed in coursework, an internship,

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1. Researching, including web, library, and/or field research
2. Planning and organizing a document
3. Drafting under pressure
4. Revising
5. Editing
6. Designing tables and figures
7. Experience with community or campus service work
8. Experience writing relevant genres
9. Designing print and/or web documents, experience with design software
10. Leading a group
11. Coordinating group activities
12. Accepting direction from others
13. Following group plans for meeting times and deadlines
14. Offering constructive criticism
15. Accepting constructive criticism
16. Managing conflict
17. Listening
18. Previous coursework related to the subject
19. Specialized knowledge or training related to the subject
20. Work experience with this organization
21. Access to necessary resources like computer equipment
22. Giving oral presentations.

Now, to assess your group's combined strengths, compare your scores with those of your teammates, possibly placing names of group members next to their highest-scoring areas. Be honest about your own strengths and weaknesses, but also be sure to indicate areas in which you'd like to develop your skills. For example, if you usually hate giving oral presentations in front of groups but want to improve this skill, let the group know so that you can plan for such an opportunity. We'll discuss managing individual responsibilities more in the next chapter. For now your goal is simply to get a sense of what kinds of projects you will and won't be prepared to handle.

After you've considered your combined skills, discuss your schedules in more detail. We understand that one of your greatest concerns about participating in a service-learning project is finding time to meet and work outside of class. In Chapter Six, we'll discuss ways to complete a range of tasks given your varied schedules. At this point you might construct a table showing each group member's committed and open time slots during the week. This can help you determine where your board meetings, agency time, and other group activities outside of class might fit. One or two time slots during the week might be sufficient. Also list any group members' upcoming trips or other expected absences to plan for alternate group times.

Identifying Possible Projects

Once you have a rough sense of what you can do and when you'll likely be able to do it, it's time to start thinking about the specifics of your project. As you move in this direction, consider (or reconsider) what you know about the organization's texts and their needs. You may want to review your agency profile. Consider what your agency contact person has told you in response to your letter and/or initial visit. Does this person already have a specific project in mind for you to pursue? Did she or he give you a list of possible projects that would be useful to the organization? Are the organization's expectations written in stone, or is there flexibility regarding the kinds of projects you might produce?

Next, consult your research about the organization's existing documents. What can you determine about the organization's document needs and expectations from reviewing these materials? Have you identified any texts, such as a website, that need major revision and updating? If your organization has requested that you produce texts for a specific project such as an upcoming fundraiser, what can you learn from the texts used in similar previous efforts? Doing this research will enable you to go into the next meeting with a more informed and persuasive ethos.

Don't let your invention about possible texts stop here, though. Your contact person may not recall all of the documents involved in a service or campaign, or you might identify a new writing need yourself. In the next section we provide an overview of the range of document types to consider.

Considering Various Genres

The genres we describe below are certainly not the only ones you might produce, but they constitute a fair representation of the types of projects our students have done. We provide more detailed descriptions of some of the major genres in Chapter Seven and other chapters. Later in this chapter, for example, we'll explain more about the rhetorical situation, parts, and conventions of proposals. Chapter Eight covers progress reports, and Chapter Nine discusses evaluation reports and other more formal reports. Because the genres vary in length and complexity, not all would make adequate projects by themselves, and some might require considerable assistance from agency personnel. Most of our students' projects have involved one complex text along with one or two shorter supplementary ones. If you're working as a one-person team, one text of medium length and complexity might be enough. Keep in mind, though, that the number of words included in a text does not directly correlate to its complexity; sometimes it's more difficult to present an important idea in a shorter document, and some types of document have more complex design elements than others. We've

OTHER VOICES 5.A Arthur Padilla

Arthur Padilla is executive director of the Sexual Minority Youth Assistance League in Washington, D.C.

Agency Mission Statement: As a youth service agency serving the metropolitan area of Washington, D.C., including Maryland and Northern Virginia, our mission is to support and enhance the self-esteem of sexual minority youth—any youth (13–21) who is lesbian, gay, bisexual, transgender (lgbt), or who may be questioning their sexuality—and to increase public awareness and understanding of their issues.

The Sexual Minority Youth Assistance League (SMYAL) staff and volunteers find ourselves writing on a daily basis. Much of the writing we do deals with financial concerns. Most frequently we must produce program reports and their accompanying descriptive narratives. These narratives are crucial to contract monitoring and ongoing communication with long-term funders. This writing also plays a crucial role in maintaining a historical record of SMYAL's program successes and failures.

Everyone on staff is also expected to write a brief piece for the agency newsletter each month. The newsletter is another important element in the communication with funders. However, in these texts we must also address the interests of our clients. This dual audience challenges the staff to be more creative and much less technical in their writing.

The most challenging of all the writing, however, tends to be the information needed for brochures, fact sheets, and other educational/information materials that are needed for large scale, general community education. The process is usually a focused effort to take a large amount of theoretical and research based writing, distill it into laymen's terms, then present it in a format that is both compelling and informative. It would seem that this is the most used and distributed information from any nonprofit group, yet it appears to be the least addressed issue for staff training. This type of information is necessary for small print media and social marketing campaigns, brochures and information sheets, website information, and for fundraising.

Student writers involved in service-learning activities with our agency could help with a range of writing tasks. They could work with staff members to design brochures or fliers for upcoming events and programs. They could be responsible for designing and editing one edition of our newsletter. Working closely with agency personnel, they could draft narrative descriptions of program developments and/or update information on our website. Any of these activities would benefit our agency and would give students an opportunity to learn a lot about how nonprofits work, what youths are concerned about, and how important effective technical and professional writing is.

divided the documents below into four categories according to their primary purposes, although some have multiple, overlapping purposes.

Group One: Promotional Materials

- **Press releases** are short text blurbs designed for release to newspapers, radio and television stations, and other media. They most often describe major news or upcoming events. For example, a group of University of Arizona students wrote press releases to advise the community of a new mayor's initiative to recruit mentors for local youth. Though these documents had to be quite short to ensure that they would be published or broadcast, they also had to be carefully crafted. The students had to find ways to quickly capture the interest of their target audiences and to give them the information they needed to consider participating in the program. Other students have written press releases about major fundraising events and about changes in organization leadership. (A few of our students have also written longer newspaper stories about upcoming agency events.) Press releases are also often written to offer an organization's position on a recent legal action or controversial event, but you should probably leave this kind of release to your organization's legal staff.

- **Billboards, posters,** and **flyers** often entail even fewer words than press releases. When Bill Wood was charged with helping his local Big Brothers/Big Sisters chapter to recruit male college students to serve as mentors for boys, he knew that one of the best times to reach this audience was while they are driving. He therefore developed a slogan and design that would capture the attention of drivers in the campus area. Although it didn't involve much writing, it did take a lot of research, planning, and creativity. These types of texts can be good supplements to a larger text in a project.
- **Fundraising letters** or **packets** are often vital to a small organization's fundraising plan. You may decide to write letters to request donations of money, goods, or services. When two University of Central Florida students worked with a local tutoring program for at-risk children, they drafted a series of letters requesting that community members provide funds to sponsor individual children, that local businesses provide materials for arts and crafts projects, and that an area entertainment attraction supply complimentary tickets for the children to take a field trip.

Group Two: Informational Materials

- **Brochures** are another good option for service-learning projects. These promotional and informational documents are critical to the success of many programs and can often be based on existing materials. Some organizations develop small **booklets** instead of brochures. Students can offer fresh and creative perspectives about designing such texts. You may remember our previous discussion of the Penn State students who worked with their campus health center to create brochures about sexually transmitted diseases. They took the medical information provided by their contacts at the center and translated it into student-appropriate language. They laid out the brochures so they would be appealing to students and the information would be easy to access.
- Many organizations seek help in creating or updating and revising **websites** about their work in general or to promote particular programs or products. One group of University of Florida students employed their professional writing and design skills to design a site for the English department's writing

internship program. Their work enabled interested students to obtain detailed information about opportunities for advancing their training.

- **Fact sheets** are generally one-page documents that provide lists of facts or pieces of information. You may have seen them in your doctor's office or in your university advising center. Like billboards, they're designed to attract a reader's attention. Fact sheets are typically used to alert readers about a change in policy, an urgent situation, or other information that could be important in their lives. A group of technical writing students at Penn State designed a set of fact sheets for Centre County Youth Services to teach parents about the warning signs of drug use.
- **Newsletters** can make excellent projects for several reasons: They involve both writing and design, they usually have clearly defined audiences, and their parts are usually easy to split up among group members. In our experience, most organizations are eager to find help with these projects. Newsletters may include feature stories, staff columns, announcements, calendars, and advertisements. One group of students actually launched a newsletter for the membership of their campus Asian-American Student Association. They researched the membership's interests and concerns. Two of the students continued to produce the newsletter long after the semester ended.

Group Three: Technical Documents

- Many agencies need help in creating **instructions, procedures,** or **manuals** for tasks performed by office personnel or volunteers. Some also need instructions written for clients or to accompany products they produce. Instructional documents usually include many illustrations, such as action-view drawings or photographs. A University of Florida student in Advanced Professional Writing created a list of instructions for entering new prescriptions into the database at the pharmacy where she worked. This document helped decrease mistakes by pharmacy techs and waiting time for customers. Her instructions, which were adopted by her company's pharmacies district wide, provided a meaningful community and business service.
- **Online documentation** and **tutorials** are usually web or CD-rom texts that help clients use a new product or system. Documentation is usually used as a reference resource; tutorials guide a user through a process step by step. Often written as hypertext, these documents contain even more complex design elements than print instructions. Authors need both experience with the subject of the instructions and technical ability in web production. A group of advanced technical writing students from Penn State worked with the campus computing center to create online documentation for a new web-based course discussion program called CourseTalk. Some students wrote documentation for the instructors, and others wrote it for the students. In both cases they field tested the documentation with potential users.
- Most campus and nonprofit organizations must on occasion submit **proposals** for funding, other needed resources, or even permission to pursue a project.

Because of their complexity and the detail they require, we don't suggest proposal projects for beginning students. Advanced business or technical writing students, though, like the ones who wrote the sample proposal you'll see later in this chapter, sometimes choose to write such documents. In this case the students wrote two short unsolicited proposals requesting funds for a no-kill animal shelter in Orlando. Proposal writing may be a more viable option if you are working with an organization that already has targeted a funding agency and has written an initial draft of its proposal.

Group Four: Business and Managerial Documents

- **Form letters** are staple documents in almost every organization. You may be asked to help your agency create or revise letters for such purposes as thanking contributors and advising job applicants of their status. A University of Arizona student connected with the American Cancer Society office in his hometown, and he had an opportunity to review and revise several of the agency's letters. His work freed up staff members to concentrate on the business of working with clients and providing services.
- When organizations are in the process of reviewing and reassessing their services or products, they often use **questionnaires, surveys,** or similar tools to gather information from their clientele. One of this book's authors, Melody, worked with a medical anthropologist to write an assessment report on the Tuscon AIDS Project's safer-sex education programs. When they finished the report, she and her coauthors agreed that they needed to create a questionnaire to gather more information about the program's target audience. Because this audience ranged in age from 16 to 23, Melody believed that her technical writing students that semester might have better language and content instincts than did she and her agency coworkers. After some research on safer sex and on designing questionnaires, the students rewrote the questionnaire to make it more audience-centered and precise.
- Every organization—nonprofit, business, or campus group—must regularly produce **reports.** This broad category of managerial and technical documents includes annual reports, financial reports, research reports, sales reports, feasibility reports, and many more. Your contact person may ask you to draft or revise this kind of document. This typically involves research and analysis as well as writing, so it requires a lot of support from your contact person. You may even choose to take on a project of your own as did one Penn State University student. She wanted to investigate the reasons for low student participation in the campus Catholic Student Association. After interviewing students and staff members and circulating a survey, she produced a recommendation report that the organization used to renew their recruitment efforts.
- **Program assessments** are critical to groups who receive funding or authority from outside their immediate control, and this includes just about every group. A highly specialized type of report, program assessments are often full of grids and graphs that represent the measurable results of agency efforts.

They often contain lists of objectives, descriptions of activities, and summaries of effects. A University of Central Florida student created such a document for a local outreach program for teens at risk, helping her agency secure ongoing state funding for the program.

Discussing Projects with the Contact Person: A Second Visit and Trip Report

A crucial component of planning a successful project is deliberating about possible texts with each other, your instructor, and your contact person. We strongly suggest that your group make a **site visit** at this point so that all of you can meet your contact person and the other agency staff, become more familiar with the agency, and negotiate the details of a project. This negotiation will involve balancing the organization's needs with your group's interests and strengths and with your instructor's requirements for the assignment.

Rather than just showing up, make a special appointment for the meeting, and tell the contact person what you want to accomplish. You might even specify the kinds of projects your group is thinking about ahead of time. Clarify, too, that you are interested in learning more about the agency and its specific writing needs. Allow enough time for the entire group to tour or observe the organization and meet members of the staff.

Also before the meeting, choose one or more group members to take detailed notes to be used for a field journal entry or a trip report (see our discussion of this genre in Chapter Four). As the sample trip report in Appendix A illustrates, this second trip report can help give your instructor a clearer picture of the projects you're negotiating (in case he or she needs to intervene) and can help you document important information about the agency and the project that can be incorporated into your proposal. Finally, you should prepare by generating a list of questions you need answered about the agency's services, texts, and resources.

Conducting the Meeting

Make sure you arrive at the meeting on time. We suggest you walk or ride to the organization together. After introducing the group members and reemphasizing your interest in the agency and its work, give the contact person a chance to ask clarification questions about the parameters of the project and what her or his specific role will be. Make sure you have consensus answers to these questions. You might even bring a handout that provides both your contact information and a list of the project's requirements (including dates). Let them know you'll be writing a proposal and a progress report for them and the instructor.

Next, ask your questions about the agency and its texts. If the contact person suggests possible projects, ask to see examples of similar documents (e.g., the texts from last year's fundraising campaign). Here are some factors about which you should probably inquire:

OTHER VOICES 5.B Nathan Trenteseaux

Nathan Trenteseaux is communications director for the United Way of Alachua County, Florida.

Soon after a group of University of Florida students selected United Way as their sponsor for a community writing project, I asked them to meet with me so we could discuss possible writing tasks. I explained to them that one of our most important ongoing projects is recording success stories of local individuals who have benefited from services provided by a United Way agency.

Each year, I ask the United Way agencies to send me names of clients who have been positively affected by the agencies' work. This year, I received 6–8 names. It was then my mission to have the students contact the people, interview them, and write the success stories.

Unfortunately, it is not always easy to track down people and get them to tell us their stories. Sometimes we have problems contacting the person, and sometimes they want to keep their experiences confidential. In many cases I have to play "phone tag" with the contacts before finding a convenient time to do the interview.

I assigned the students two stories each. I first sat down with them and gave them an overview of the success stories and the agencies involved. Then I gave the students copies of last year's campaign brochure so they would have an idea of how we write the stories and how they appear in the brochure. I also worked with the students on what types of questions to ask during the interview.

I explained to the students that we like to keep the stories fairly short and full of good quotations. The stories begin with background on how the individual or family came into contact with the agency and then go into the things the agency did for them and how this affected their lives.

I must say that everything went well. Once they had examples of stories and were able to contact the people, they had no problem writing the stories. I was always available to answer the students' questions and to offer suggestions for revisions. We met on a weekly basis to give updates, answer questions, and go over drafts.

I was extremely pleased with each student's effort and quality of work, and I'm glad that they learned something about United Way agencies and their positive effect on people in our community. With the success stories, others will learn about these effects as well.

Sitting down with the students and offering them encouragement and guidelines on how to interview and write the stories was key to their success. I also tried to keep a business casual atmosphere during meetings. I wanted them to feel at ease and free to talk to me in a conversational manner about the project or other concerns. Coming into a professional setting can be intimidating at first.

I look forward to the opportunity to work with the students again in the future.

- sample projects and texts, including identification of the most needed or pressing
- resources needed and available for producing texts
- people involved in producing texts
- organization's expectations for quality of content and appearance of texts
- organization's time frame.

As you receive answers to these questions, you'll want to assess how well the projects fit your interests. Don't be afraid to reinforce your group's suggested project at this point. The negotiation will likely involve some compromise on your and the agency's parts.

After you work out the most promising project and gather as many needed resources as possible, you'll want to discuss logistical details such as how often and when your group will visit the agency, the best way to communicate with the contact person (e.g., email or phone), and a tentative schedule for accruing feedback from the contact person.

In most cases the organization will have more than enough possible projects from which to choose. Occasionally, though, despite students' efforts to select a viable organization, the organization's personnel won't know or be able to effectively articulate what they want. Maybe they haven't worked with student writers before. Maybe they work on a limited number of projects that the staff can currently handle. If you find yourself in this situation, you can take more initiative in suggesting a project, being careful not to overstep or overcommit. This will probably require some extra research and an extended dialogue with organizational personnel and your instructor. It may also mean that you'll receive less directive feedback from your contact person over the course of the project. If the organization seems unable to come up with specific project ideas because it is disorganized, however, consider switching to another organization that responded favorably to a group member's letter of inquiry. Ask for your instructor's guidance at this point. A group of Blake's students decided to work with a student environmental organization on campus, even though they didn't know much about the organization. Their excitement about the organization's stated mission caused them to overlook the fact that the organization itself was in disarray and only sporadically active. The group was concerned but decided to propose a project with the organization anyway. They later regretted it. As group member Ari Luxenberg explained at the end of the project, "They [the organization] had no clear goals or organizational infrastructure and were incapable of making decisions or giving our group any guidance as far as the project was concerned." As this group experience warns, you probably shouldn't base your decision to work with an organization solely on shared interests.

Evaluating Your Project Idea

Once you've had a group site meeting and negotiated a project, run your idea through the following checklist to ensure that it meets everyone's requirements and expectations. This group exercise may seem redundant, but it can help you avoid much frustration during the next few weeks or months.

- *Is your planned project writing oriented?* Sometimes when students get excited about working with an organization, they lose sight of the goal of improving their writing. Similarly, agencies may be so excited to find that students are willing to work with them that they will request other kinds of help. One group of students offered to produce documents for a Tucson wildlife protection agency, but they were asked to do much more, including taking care of animals and maintaining facilities. Their contact person didn't have a clear sense of the purpose of the project, so they had to reinforce the assignment requirements. You may volunteer to do additional service for the agency on your own; just be sure to focus on a writing project for your course.

- *Does the project involve enough work to keep your entire group busy for the allotted time?* Sometimes agency personnel who dislike writing or have not actually written documents like those they're asking you to produce overestimate the complexity and difficulty of writing tasks. Avoid the last-minute scramble for more writing assignments that one group of students faced when they discovered that their local Easter Seals office only needed five very similar versions of one donation request letter.
- *Can you realistically complete the project in the allotted time?* While it's critical to be able to stay busy and produce a significant writing project at the end of the term or unit, it's also important to be sure that you can bring all of the pieces together by the deadline. A University of Central Florida student agreed to produce promotional materials for an Orlando charter school but was dismayed when she realized that the school needed far more assistance than she could offer in one semester. Her early efforts were so scattered that she had a hard time creating a larger coherent project to submit for her final course portfolio.
- *Do you have the skills, training, and abilities needed to complete the project?* If you completed the previous assessment exercises, then you've already given this question some thought. Be sure not to commit yourself to using software or equipment that you haven't already mastered or don't have time to learn. Select a project that matches your strengths, as did the University of Arizona environmental engineering students who applied their skills from a recent engineering course to a water resources project.
- *Are the documents you plan to produce needed?* Sometimes an organization contact person is so eager for assistance with writing projects that she or he will suggest project ideas before thinking through them thoroughly. In your visit you might ask the contact person who will read the documents, how the documents will be distributed, and what readers will do with the information presented in them. One student discovered quite late in the semester that the veteran's services agency with which he was working did not have a clear plan for using the proposal he was writing for them. He had to improvise a new plan at the last minute to make his project work.
- *Do you and the agency have the necessary resources to use, produce, and distribute your texts?* Again, sometimes a contact person's eagerness to obtain assistance or to help you with your class project may cause her or him to suggest projects that have not been carefully planned. Some may not understand everything that is involved with producing or using a particular text. People who don't know much about the web may not understand that they must have space for posting their sites as well as staff resources for maintaining them. Some may not have the funds available for creating desired documents. They may not know how expensive colorful brochures can be or recognize

that advertising on one billboard can cost several thousand dollars per month. This information came as a surprise to Bill Wood's contact person at the Big Brothers/Big Sisters office. To see his efforts pay off, Bill did some extra work soliciting donations and discounts for ad space.

- *Do you understand exactly what your contact person is expecting?* Making contact with a local organization through service-learning can be a mutually beneficial process, but it can also go from pleasant to frustrating if communication becomes shaky. You'll want as clear an idea as possible of what the agency representative is expecting. You may want to ask the representative to show you a sample of a document of the same basic quality and approach they're expecting to ensure that you're on the same page. You'll want to address such concerns as the length of the document, the expected level of technical information, and the expected final appearance. Get these matters straightened out up front to avoid the frustration faced by a group of Penn State students who wrote proposals for a local AIDS service organization. Toward the end of their project they were surprised to learn that their contact person had expected them to do extensive health care research on their subjects and to cite this in their proposals. Needless to say, they spent a few long nights at the library.
- *Does your contact person have the authority to assign you this task?* It's important to become as familiar as you can with the social context of your work. To avoid stepping on someone's toes, find out about the organization's chain of command. One group of students got into a complicated situation in the process of revising brochures for several programs at a local children's charity. Though their contact person (the director of the agency) authorized them to overhaul the documents, she failed to let the individual program directors know about this decision. When the students contacted these directors with their suggestions for substantial changes in the promotional materials, the directors were offended and frustrated. The students had to garner the goodwill of these collaborators before their writing and design suggestions were accepted.
- *Do you have the authority and access to information to complete all pieces of the project?* Keep in mind that many nonprofit agencies providing services to clients deal with sensitive and confidential issues. You may not have the legal or ethical right to access certain types of information that seem relevant to your work. If you face such a situation, ask your instructor and contact person about ways to compensate. One group of University of Arizona students working with a program for Latina at-risk teens ran into this problem when they were told to review client case files to get ideas for promotional materials. Ultimately, the problem was settled when the contact person agreed to summarize the information in the files, omitting such personal details as names and addresses.
- *Does the contact person understand precisely what is and is not your responsibility?* This question may seem redundant, but it is very important. Be sure that your contact person understands how much of the research you'll do and how much of the legwork for production and maintenance you'll provide. A group

of University of Central Florida engineering students who worked with a state wildlife and game agency found themselves in a tough spot when their contact person expected them to complete data collection and come up with a plan for distributing leaflets to fishing enthusiasts at state lakes. Be sure to make your abilities, commitments, and limitations clear to your contact person.

Many of the examples above may sound like service-learning horror stories. Don't get the impression from reading them that all projects are doomed to failure. That's certainly not the case. Despite all of the glitches the abovementioned students faced, they found ways to work out their difficulties and make impressive contributions to their agencies and communities. Often our students' best learning came out of such experiences, and we'll discuss how you can turn messy situations into interesting opportunities for improving your writing and management skills when we introduce the progress report assignment in Chapter Eight. You can avoid some frustration and save time, however, if you address problems with your contact person and instructor early or, if need be, negotiate another project. As we've noted before, a truly successful service-learning project must provide benefit to everyone involved. We've discussed many ways for making sure this happens—choosing your agency carefully so that it matches your interests and values, refining your project to take advantage of your skills. As you work on the project, be on the lookout for possibilities for turning this work into additional opportunities. One University of Arizona student was awarded a prestigious internship at his university's public radio affiliate partly as a result of his service-learning work there.

Moving Toward a Project Plan

Once everyone involved is satisfied with your project idea (which can involve several related texts), you can begin to develop a plan for tackling it, starting with dates and other logistical concerns. We recommend scheduling an initial group planning meeting in which you visually map out your project on a large calendar. You might draw one on an electronic whiteboard, a poster board, or a large piece of butcher paper. If you use paper, ask one member to convert the plan into electronic form to share with the entire group. Fill in the calendar with the following items:

- *Assignment due dates from your course syllabus.* Include the dates for the proposal, progress report, workshops, the evaluation report, project presentation, and any reflection assignments.
- *Important agency dates.* Using a different color, mark all meeting and workshop times with agency personnel, the agency due date, and the agency production date.
- *Group and individual scheduling.* Using yet another color, add information about weekly and other group meetings. When and where will the group meet? How many of these meetings will be at the agency? Your instructor may have a few days on the syllabus dedicated to group work. Mark also any

dates when members plan to be out of town, studying for major tests in other classes, or working extra hours at their jobs.

- *Fill in the steps of the process.* Keep in mind that you'll have to build in time for every phase of the document writing process. Whether you're doing a semester-long project or just one unit in the course, you'll need to plan carefully as you will likely have other class responsibilities and because due dates will not always match up with your process. Possible project phases include the following.
  1. writing the proposal
  2. doing necessary research
  3. planning the documents
  4. drafting the documents
  5. exchanging and commenting on the documents
  6. reflecting on the project
  7. planning your revisions
  8. revising the documents
  9. editing the documents
  10. putting the parts of the documents together
  11. transmitting the documents.
- *Using Chapter Six as a resource, plan your approaches to collaboration.* When and how might you split up tasks, work together, or hand off tasks from one person to the next? How do you plan to exchange and comment on documents?
- *Cover all the bases.* Email your plan to your teacher; then revise it in light of her or his suggestions. Double check your agency's deadlines and your teacher's expectations in terms of number of required pages, range of documents, and so on.

You can use much of this invention in drafting the management section of your proposal, the genre we discuss next.

Proposal—Rhetorical Situation

Now that you've met with your organization's contact person and tentatively worked out a project plan, it's time to formalize your plans in a proposal. A proposal is a request for an opportunity to pursue a project and is a critical component of many tasks in the workplace. This is a genre of writing that most professionals produce on a regular basis. One of your audiences for the service-learning project proposal will be your contact person and others at the organization involved with your project. You can think of this document as a contract between your group and your agency contact person(s). For these readers the proposal will confirm your assignment, clarify their roles, and outline important dates. Although this audience will likely keep your proposal on file, initially they may only skim the document.

The proposal is also a contract with the second audience, your instructor, who may not yet know the details of the work you have agreed to do. In addition to evaluating the quality of the writing in your proposal, your instructor will likely study the document closely to ensure that your proposed project meets the requirements of the assignment (e.g., scope, deadlines) and has been carefully thought through. If your proposal isn't detailed enough, especially about the implementation of the project, your instructor will likely have you revise it before you proceed. Thus, your proposal also has a persuasive purpose for this audience.

Like most proposals, yours will not only further specify and seek approval for the project, but also, once approved, serve as a reference document for you and your supervisors. For you, the proposal will function as a blueprint. The better the blueprint, the smoother the process and the better the product. Therefore, it is in your best interest to be as thorough and as detail oriented as possible. As a contract, the proposal will be a reference point against which your progress report and final product will be measured. For example, your progress report may refer directly to the timeline in your proposal.

Proposal Types

The proposal is one of the most diverse genres of technical and professional writing. Proposals can be long or short, formal or informal, external or internal, solicited or unsolicited, promising research or delivering goods and services. You might think of proposals as documents that offer to solve a problem. The complexity of the problem and the solution usually determines the complexity of the proposal. Relatively simple, easily implemented solutions may only require memos, letters, or emails; more extensive solutions may require longer, formal proposals.

As part of analyzing a proposal's rhetorical situation, it might be helpful to place it along a continuum from formally solicited to unsolicited. On one end we have proposals that are formally solicited by requests for proposals (RFPs). If a company, a government agency, or other organization needs a problem addressed, a product produced, or a service performed, it might issue an RFP to solicit solutions. Some RFPs set out very specific guidelines for the solution and the components of the actual proposal. On the other end of the continuum we have proposals that are not invited or solicited and, in some cases, address problems their audiences aren't even fully aware of. For example, an employee may discover a more efficient way to file student data and propose the new system to a supervisor who is content with the current system. As Markel points out, most formal proposals are written to audiences who at least have agreed informally to accept them (though not necessarily to approve them) because they require so much time and effort to compose (485). Many proposals fall somewhere between the two ends of the continuum. For example, some proposals are informally invited, and others are solicited through general requests or are written in response to general guidelines. Some proposals are written to audiences who recognize a problem but haven't yet sought solutions for it.

The degree to which a proposal responds to an audience's solicitation will certainly affect its shape. A proposal responding to a detailed RFP must adhere meticulously to the RFP's requirements and reflect its concerns. A proposal written to an audience who has identified a problem only generally or hasn't identified one at all will need to do more convincing in the problem section before providing the details of the solution. An internal proposal invited by your employer may not require as much detail about your capabilities and experience as one written in response to a publicly issued RFP.

The proposal for this assignment might be considered both solicited and unsolicited. Although you are being assigned to write the proposal, the specific community and writing problems it addresses have not yet been defined. Thus, you will need to convince your instructor that you are addressing an important, urgent set of problems before you convince her or him that your specific solution is desirable and feasible.

Proposals can also be categorized according to what Markel calls their deliverables, or "what the supplier will deliver at the end of the project" (486). Deliverables can be research or goods and services. Research proposals, common in the sciences, propose to study a problem and produce some type of research report of the study. Goods and services proposals promise to deliver some kind of product, service, or combination of the two. For example, an engineering firm might write a proposal to design and build a bridge, or a professional communication consultant might propose to conduct a set of workshops for improving communication within a company.

Your service-learning proposal and project may lead to both types of deliverables. You will discuss your service-learning "research" for the agency in a progress report and a final report for your instructor. More importantly, your project will produce a usable professional document or set of documents for your sponsoring organization.

Proposal Parts

Formal proposals (and, to some extent, short, informal proposals) are conventionally arranged around some version of the following set of sections.

1. introductory summary or overview
2. problem section, sometimes combined with the introductory summary
3. solution section, including a discussion of objectives that is sometimes a separate, preceding section
4. management section, including a discussion of the proposers' capabilities that is sometimes a separate section
5. cost or budget section
6. optional concluding section.

Because you likely will not be requesting funds for your project, your project proposal may not need a cost or budget section. If, however, you are working on a project that will require the purchase of supplies, you should include this in a brief budget section. You may indicate whether you expect to pay for these items yourselves or you expect the organization to supply them. Also, some nonprofit agencies can obtain tax credit and increased community funding when volunteers contribute a certain number of hours to their efforts, so it's good to estimate an approximate number of hours you expect to work on the project. Noting this in the proposal will help you to remember to keep track of your hours and to turn in a record of them at the end of the project. This will further benefit your organization.

In what follows we further describe the sections of a proposal in the context of your assignment, referring to the sample student proposal in Figure 5.1. Figure 5.1 is based on a proposal written by advanced professional writing students at the University of Central Florida. In this sample, three students propose to write two funding proposals and a shorter, related newsletter article for A Dog's Best Friend (ADBF) no-kill animal shelter in Orlando. Although we recommend that beginning technical and professional writing students not choose grant proposals as their major writing assignments due to the context-specific complexity of the genre, the student writers in this example had been exposed to technical writing and proposals from previous coursework and jobs. Although the proposals we include here and in the appendixes are for group projects, we realize that you might be proposing an individual one. This might simplify some parts of your proposal, such as the management section, but it might make other parts, such as the solution section, more challenging. You'll likely have to work harder to convince your instructor that you have the skills and initiative to carry out the solution by yourself. Your project will still be somewhat collaborative, of course, as agency contact people and your instructor will be involved.

Title Sheet

Even before the introductory summary, formal proposals begin with a title sheet that contains an informative title, the authors' names, the date, and the primary readers' names. The title in Figure 5.1 both indicates the general solution and tells readers the genre of the text.

Introductory Summary

Although you may think of this section as just an introduction, it has several crucial functions. In some rhetorical situations, the introductory summary will be the most-read section of the proposal. Busy managers and other readers may rely on this section to get a handle on what's being proposed and to decide where to turn next. The introductory summary sets the context for the rest of the proposal, telling readers the purpose of the text, previewing the problem and solution, and laying out the text's arrangement of subsequent sections. Managerial introductions, detailed introductions meant to give managers and other decision makers a full overview of the text, also preview the overall costs.

Remember that a purpose statement tells readers the rhetorical purpose of the text. The writers of the ADBF proposal in Figure 5.1 don't include such a statement, as the primary audience, the instructor, already knows the text's purpose. In other cases, however, the audience needs the immediate orientation provided by a purpose statement, either because they don't know the text's purpose(s) or they need to

Procuring Animal Care Funding for
A Dog's Best Friend Animal Shelter:
Project Proposal

By Team Buddy:
Maggie Boreman
Mark Dunn
Lori Phillips

Submitted to:
Professor Melody A. Bowdon, UCF
Director Charlotte Klokis, ADBF

February 10, 1998

Introductory Summary

A Dog's Best Friend (ADBF), the only truly no-kill animal shelter in Orlando, desperately needs more funding for animal care operations and shelter improvements. This nonprofit organization is supported wholly by donations and is run completely by volunteers.

The organization must supplement the individual donations its raises through its newsletter and web site with grants from foundations and other funding sources. Although the shelter's volunteers are aware of its needs, they do not have the time or expertise to research and write grant proposals.

Therefore, Team Buddy[1] proposes to produce two short grant proposals for ADBF, one for operational supplies and one for capital improvements. The project will involve meeting with the volunteers to prioritize and cost needs, identifying and researching promising funding sources, and writing and revising the proposals.

The remainder of this proposal will elaborate on the problems the project addresses, delineate the elements and steps of the project, and explain how we will carry out the project successfully.

Problem: Raising Funds for Operational and Capital Needs

ADBF is no-kill animal shelter (i.e., shelter that does not practice animal euthanasia) in Orlando with the following mission: to provide housing, food, and veterinary care to

(continued)

Figure 5.1 Team Buddy's project proposal discarded dogs and cats until they can be adopted by new, responsible pet owners who will spay or neuter them.

The growing number of stray or abandoned animals in the Orlando area has caused area shelters to become overcrowded, even as more and more animals are being euthanized by county animal control facilities. Thus, ADBF is operating beyond its capacity of 100 animals, which only compounds its funding crisis.

Funding and Writing Problem

ADBF is a nonprofit organization that operates solely through adoption fees and private donations by individuals (raised mostly through special events, letters, and the organization's newsletter and website). These funding sources are not meeting the shelter's operational and capital needs, outlined in the following lists:

Operational Needs

- dog and cat food
- cleaning supplies (e.g., litter, racks, pails)
- medical and veterinary expenses
- office supplies (e.g., file cabinets, copier)
- other supplies (e.g., cages, collars)

Capital Needs

- whole-house fan
- tile for floor
- new drainage system
- more kennels and runs
- van for transporting

Because some of the above expenses (especially capital ones) will be somewhat costly, ADBF needs a way to raise larger chunks of money. Such funding could be raised through grant proposals, but none of the current volunteers are able to write them. ADBF has no paid staff members; instead, the organization is directed and run by a handful of volunteers, four of whom run the physical shelter.

Although they are acutely aware of the shelter's needs and might also know of a couple potential funding sources, these volunteers have little to no experience researching and writing grant proposals. They are animal caretakers, not technical writers. The current volunteers wouldn't have time to write the proposals anyway, as they are already working overtime just to keep the shelter running.

Solution: Writing Two Grant Proposals to Animal Welfare Foundations

To solve the funding and writing problems, Team Buddy will write two grant proposals to national foundations specializing in animal welfare. The first proposal will request funding for operational expenses (including a copier), and the second will request funding for capital improvements and a van to transport animals. In addition, we will write an article for ADBF's email newsletter explaining the tasks involved in writing a grant proposal and asking for more volunteers to aid in this effort. Thus, our main objectives for this project are the following:

(continued)

Figure 5.1 *(continued)*

- To identify about 10 or so potential foundations or other similar funding sources and to further research the two or three most promising ones.
- To produce two detailed and professional grant proposals out of our collaboration with ADBF volunteers.
- To secure at least one grant from this effort.
- To identify several existing or new volunteers who have some technical writing background and who could assist the core volunteers in writing future grant proposals.

The rest of this section will give a rationale for our solution and detail the four major tasks that it entails: 1) prioritizing needs and determining their costs; 2) identifying and researching promising funding sources; 3) writing and revising the two proposals; 4) writing supplementary materials, including materials to accompany the proposals and a newsletter article recruiting more volunteer proposal writers.

Rationale

We could have chosen to assist the shelter with several other communication projects, such as working on the design and content of its website and print newsletter or producing a set of informational and promotional texts for pet adoption days. According to the director of ADBF, however, grant proposals and other fundraising texts are needed more. Although we are not experienced technical writers, and proposals are complex texts, we will learn about proposals in class and will supplement this information with other reading. Further, we are getting proposal writing experience with this very assignment.

Most grant proposals go unfounded, and those that are successful usually only get one-time funding. Yet we will only be able to write two proposals, and many of the shelter's expenses are ongoing. To compensate for this, we will also try to recruit a group of volunteers to serve on a proposal writing committee. This group would compile a database of funding organizations and would write two or three proposals per year. We will write an article in the shelter's email and print newsletters proposing the committee and explaining what would be involved.

Prioritizing Needs and Determining Costs

The first task of our solution, and one that we have already begun (see list on p. 1), is to collaborate with those who run the shelter to specify further their operational and capital needs, prioritize those needs, and estimate the costs of those needs.

To arrive at some of the estimates, we may need to consult professionals as well, such as an auto dealership for pricing new and used vans or a contractor for pricing a new floor drainage system. We will clearly need to rely on the shelter's director and workers to prioritize their needs and decide which we should specify in our two proposals. Even

(continued)

Figure 5.1 *(continued)*

those we do not pursue can be pursued in future grant writing efforts. We will then try to target sources that will likely fund the most urgent needs.

Identifying and Researching Promising Funding Sources

The second major task, which we have also already begun and which will overlap some with the first one, is to identify and research animal welfare foundations and other promising funding sources. This will not only help us determine who our audiences will be for the two proposals, but will help us form a larger database of funding information for future proposal writers to use.

Using the Foundation Directory, we have already identified three potential grantees:

1) The Summerlee Foundation, which makes grants to alleviate fear, pain, and suffering of animals and to promote animal protection and the prevention of cruelty to animals.
2) The Company of Animals Fund, which funds spaying/neutering, adoptions, cruelty investigations, and rescue. The money must be used for emergency or ongoing care of companion animals.
3) The Edith Goode Foundation, which funds efforts to prevent cruelty to animals and to promote animal welfare.

Using foundation directories, we will find out more about each funding source, including its mission and values, the types of projects it funds and doesn't fund, short descriptions of recently funded projects, and requirements for proposals and funded projects. We may need to adjust the prioritized list slightly based on the requirements of the funding sources we target. For example, most foundations have a limit on the amount and only fund certain types of items or projects.

Writing and Revising the Proposals

After we get a better grip on our audiences and their requirements, we will be in a better position to begin drafting the actual proposals, which will likely include roughly the same parts as this proposal along with a cost section. Some foundations ask for shorter proposals, however. Before drafting we will make a comprehensive list of specific questions to which our audiences will likely expect answers. Also before drafting we will make an outline of the proposals' major sections and what they will cover; this will ensure conformity to requirements as well as coherence.

In drafting we will make sure that we answer the audiences' questions in as much detail as necessary. We will try not to include extraneous information. Drafting the cost sections of the proposals will require us to work with the shelter's accountant. For the management and cost sections, we will first draft any illustrations and then the accompanying text.

Once we have a complete, carefully written draft, we will workshop each proposal twice, once with our classmates and once with our contact person at ADBF. The former

(continued)

workshop will focus on the proposal's persuasiveness to its audience and its concision, coherence, and cohesion. The latter workshop will focus in part on how accurately it represents the needs of the agency. We will also give our instructor drafts for comment.

After extensive revising of our drafts based on the comments from the workshops and our instructor, we will closely edit the proposal, fine-tuning its style and physical presentation. This part of the process will ensure that the proposal is as error free and polished as possible.

Writing Supplementary Materials

Finally, after we have completed the proposal writing and editing process, we will need to write cover letters to transmit our proposals to the two funding sources. These should be fairly easy to write but must explain what the proposals address and must highlight their most important points. For this part of the project, we will consult a proposal-writing textbook about conventions of transmittal letters. We will also closely consult with ADBF's director in writing and revising the letters, as they will also bear her signature.

The second supplementary text we will write is a newsletter article recruiting volunteers for a proposal writing committee. In this letter we will explain the proposal writing process, overview the resources volunteers would have to work with (including a proposal writing textbook, sample proposals, and a database of needs and foundations), and explain how the committee would work. The article will be written as a short and informal "How to Volunteer" piece.

Management: Collaborating and Completing Tasks

Now that we have explained what the parts of our project will involve, we will explain how we will successfully enact them. This section will first explain who will work on the project and what their roles will be, how we will collaborate with each other and ADBF volunteers, and what resources we will draw upon. The second part will present our timeline for completing the project and its parts.

Team Roles and Collaboration

The three members of Team Buddy are Maggie Boreman, Mark Dunn, and Lori Phillips. Maggie adopted a puppy from ADBF and is already fairly familiar with how the shelter operates. Additionally, as a technical writing major she has written proposals for several course projects, one of which was business plan. Journalism major Mark Dunn has substantial writing and design experience, including working as an editor for the campus newspaper. He has also served as a volunteer in two local community service organizations. Lori Phillips, a mechanical engineering major, is part of a team who wrote a successful proposal for designing a solar car. She designed all of the figures and tables for this proposal.

Team Buddy's contact person at ADBF is Charlotte Klokis, its director. She has agreed to meet with us regularly as well as give us extensive feedback about our work. We will also be consulting Rachel Walker, the shelter's accountant, about the cost sections of the two

(continued)

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(continued)

proposals. Our professor, Professor Melody Bowdon, will supervise our work through the project as well. Here is the contact information for all involved in the project:

Table 1: Contact Information for Project Participants

Name	Phone #	Email
Maggie Boreman	407-677-8554	mbb2@pegasus.ucf.edu
Mark Dunn	407-677-2187	newsman1@hotmail.con
Lori Phillips	407-607-3338	lphillips@pegasus.ucf.ec
Charlotte Klokis	407-605-9595	klokis@hotmail.com
Rachel Walker	407-605-9595	rachelwalk@aol.com
Melody Bowdon	407-607-6500 ext.230	mab@pegasus.ucf.edu

As Figure 1 shows below, Maggie will be the team's organizational leader and main liaison to Ms. Klokis, whom she already knows. Maggie will call and remind the othe members of group meetings, ensure that meetings are productive, and relay questions messages from the group to Ms. Klokis and vice versa. Although all three group members will contribute to the research, writing, design, and revising of the proposals Mark will supervise the writing process, meaning he will make sure members get thei parts written and create a system for revising and proofreading each part. Mark will a be the group's main liaison to Professor Bowdon. Because of her research and design background, Lori will oversee the group's research of funding sources and design of a figures and tables to be included in the proposals. This latter task will also require Lc be the one who meets with Ms. Walker, the accountant.

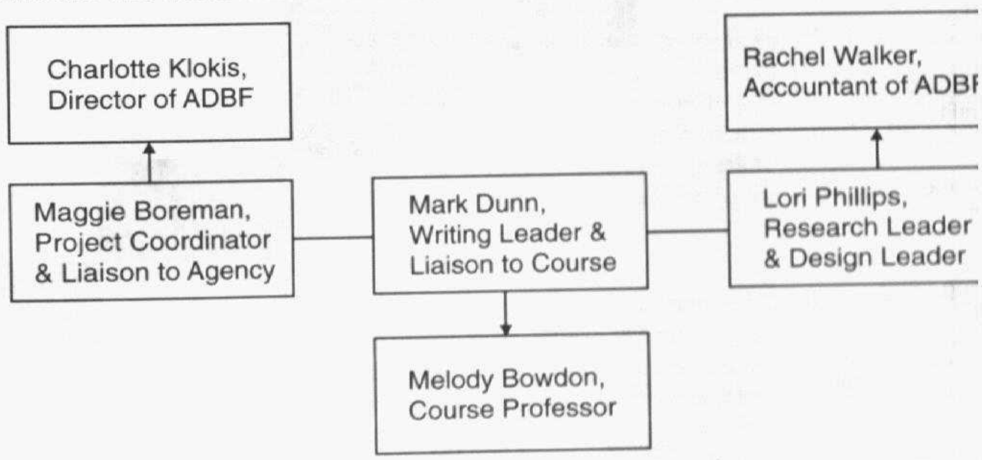

Figure 1: Organizational Chart of Project Participants

Meetings and Timeline

In addition to class time designated for working on our projects, our class time will h two standing meetings per week at the following days/times/locations: 1) Mondays,

(conti

Figure 5.1 *(continued)*

10:30 A.M.–12 P.M. in our classroom computer lab after class; 2) Thursdays, 4–6 P.M. in the Library West computer lab. Meeting in computer labs will enable us to design, draft, and revise online, thereby saving time and effort. When we have less to work on, we may decide to conduct meetings in our course's synchronous chat room on the web. We also understand that we will need to hold additional meetings at certain points in the project.

Most of our contact with our contact person at ADBF, Director Charlotte Klokis, will be through email, all of which Maggie will send. Ms. Klokis has also agreed to meet with our group to review our work once at a week, on Mondays at 1:30 P.M. at the agency. Some of these meetings will require the entire group to attend, and some will only require Maggie, the agency liaison, to attend. On weeks that Ms. Klokis cannot meet, we will send her updated materials as email attachments. We will need to visit the shelter a little more toward the beginning of the project when we further determine the agency's needs and toward the end when we ask for feedback from our contact person, the accountant, and possibly others.

Figure 2 below is a milestone chart showing the project's major tasks, their timeframes, and the group members supervising them. You will also notice important due dates, some for course requirements, some for agency requirements, and some for both.

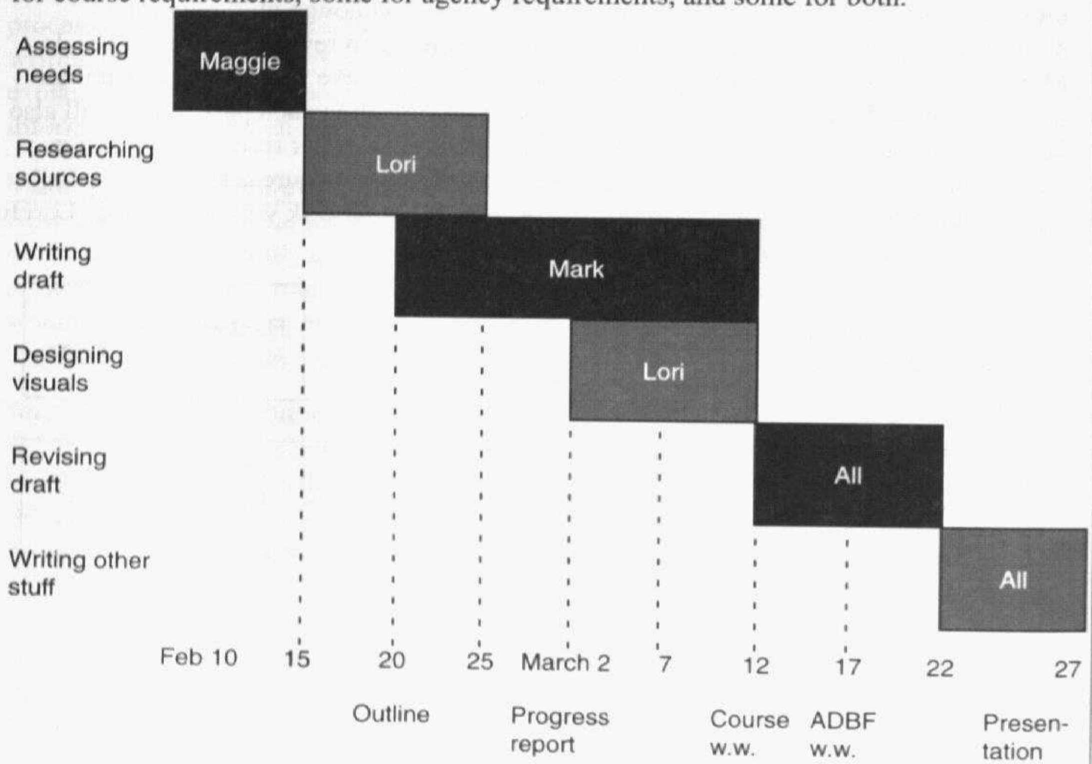

Figure 2: Gantt Chart Showing Major Tasks and Deadlines

(continued)

Figure 5.1 *(continued)*

As you can see, we have arranged our work to coordinate with course dates for the progress report, writing workshop, and presentation. This schedule will also enable us to complete the proposal before the agency's due date of April 1.

We call your attention to two other elements of our management plan shown by the Gantt chart above. First, part of our collaboration will be divide-and-conquer and part will be simultaneous. Although we will split up leadership responsibilities and the parts of the proposal to write, we will also meet together to revise each part. We will use our standing and class meetings to go over previously assigned work and to set new objectives and individual tasks. Second, we allotted a full ten days to revising the proposal based on the feedback from the two writing workshops. This should be ample time to solve any problems that might arise in preparing the proposal for delivery.

We allotted less time for writing the newsletter article because it is a shorter, simpler assignment and because we will draw on materials already gathered in our invention for the proposal.

Conclusion

In conclusion, we are confident that our shared commitment to helping stray pets, the eager cooperation of our agency, our writing experience and resources, and our project management skills will enable us to produce a successful grant proposal that will address an urgent community need. At the very least we will leave ADBF with a professional proposal template and an initial campaign to recruit future proposal writers.

[1]Consisting of three Professional Communication students at the University of Central Florida, Team Buddy gets its name from Buddy, an Akita/Scottish Deerhound puppy adopted by one of us from ADBF.

be reminded of it (them). Also, the proposal's purpose is signified, to some extent, by the title and forecasting statement. The sample proposal instead begins by previewing the two problems—the underlying community problem and the organization's writing problem—as well as the solution and its major parts. By presenting these parts, the writers give the audience a more complete picture of the solution and, at the same time, preview the major subheadings in the solution section.

Problem Section

In this section you will address two related problems: (1) the larger community problem(s) that the organization is trying to address in their writing efforts; (2) the organization's writing problem and its more direct exigence. Although the first of these is important, partly because it helps generate the second, the writing problem should be the main focus of your proposal. In other words, your proposal should primarily address how you will help the organization meet its writing/designing/editing needs. Remember that your solution will focus on writing and how it will help the agency. In addition to being generated by a larger community problem and the organization's efforts to address it, the writing problem might be caused by conditions at the organization such as lack of staff, resources, or expertise to produce the needed texts. Let's look at the example in Figure 5.1 to clarify the difference between the two types of problems.

The section first explains the underlying community problem that has generated the organization's needs: The area's growing number of stray animals has pushed ADBF beyond its capacity and ability to fulfill its mission. Then the writers move to a more detailed description of the organization's funding problem, the more specific problem that their proposed writing will help solve. They end by describing the conditions at the organization (e.g., the already strained staff and its lack of writing resources and experience) that contribute to the problem and constrain the possible solutions for it.

As we have already explained, the length of your problem description (and especially its explanation of the significance) depends on how much your audience recognizes and understands the problem—the less the audience is aware, the more explaining and convincing you will need to do. Whether the proposal is unsolicited or solicited, however, its problem section needs to be specific, audience centered, and pointing clearly toward a solution.

We've found that many students have difficulties describing a problem or a set of problems specifically or locally enough. Problems are more specific than topics or even issues. In the context of a problem description, a problem might be defined as a clearly discernable and at least partially solvable set of circumstances producing negative effects. In the case of the ADBF proposal, these circumstances involved the agency's needs for funding and writing, the first of which the writers list in detail.

The purpose of such specificity is to demonstrate to the audience that you thoroughly understand the nuances of the problem from their perspective, with their concerns in mind. This is one of the proposal's persuasive purposes. A superficially defined problem will lead to a superficially defined solution. When drafting your service-learning proposal, you may want to run your problem description by your contact person at the agency to make sure you understand the problem, its causes, and its effects the same way she or he does.

One reason the problem description is so important is that it sets up the objectives and solution. As we discuss below, the coherence among these sections is crucial to the proposal's success. If the problem is the circumstances that produce negative effects, then the objectives can be thought of as more beneficial effects and the solution as the circumstances that can produce them. In describing the agency's funding needs and writing problem, the writers of the ADBF proposal create the rhetorical space for their specific objectives and solution. Their description of the writing problem even refers to the solution of writing grants, however generally.

Some proposals end the problem section with a list of objectives, and others place the objectives in a separate section between the problem and the solution sections. Most, including our example of the ADBF proposal, include the objectives in the solution section, however, as a way to announce what the solution will accomplish.

Solution Section

The solution section is the heart of the proposal; it describes in detail the scope, the parts, and the desirability of your proposed project. Its parts should include an overview, a list of objectives, a discussion of alternate solutions, and a detailed description of the solution's major parts or tasks. Although this section is primarily informative, it also has persuasive purposes—you must persuade your audience that you have thought out your solution carefully and that it is more desirable than alternatives.

As a longer section with multiple parts, this section might begin with an overview of the solution's scope and deliverables, as this section of the ADBF proposal does. Given its primary audience of the instructor, your proposal's solution overview should probably address, at least implicitly, how your solution fits within the parameters of the course assignment. Sometimes the explanation of the scope explains what the project does not entail as well as what it does. Remember that the proposal is also a contract between you and the agency. Here you make explicit just what the agency can and cannot expect from you.

A list of the solution's objectives—or specific, measurable outcomes—is also sometimes included toward the beginning of the solution section. Whereas goals can be general, objectives must be specific and concrete. The bulleted objectives in the sample proposal, for example, specify the number of foundations the writers will research and the number of proposals they will write and submit. As we have already suggested, the objectives should flow directly out of the problems.

Just as the problem section should focus on the agency's writing problem rather than the larger community problem it addresses, so should the solution focus on your writing tasks rather than the work your deliverables will help the agency accomplish. The parts of the solution in Figure 5.1 clearly reflect the tasks of the group's writing project. The writers begin to establish a credible ethos through the detail of their solution subsections, taking the reader through every anticipated step of their writing process from researching the subject matter and audiences to workshopping and revising the documents. The writers also explain how and why they will perform each task, anticipating any questions their audiences (especially their instructor) might have.

Another way you can strengthen your ethos and instill confidence in your readers is by demonstrating that you have done your homework related to the solution. In describing the texts you will produce, you should draw on the information you have gathered in your preliminary research. Under the subheading "Identifying and Researching Promising Funding Sources," for example, the writers describe this task as a continuation of the research on foundations that they have already completed.

Management Section

This section, perhaps more than any other, is where the proposers inspire (or fail to inspire) their audience's confidence in their ability to make their solution a reality. Proposal writers can show that they understand the audience's problem and propose a desirable, well-thought-out solution, but if they cannot convince their readers that they are capable of implementing the solution, their proposal will not succeed.

The management plan typically includes a description of the project personnel and their roles as well as an outline of the project's schedule. Basically, then, this section answers the readers' questions about who and how. Like the cost section, the management section typically contains several illustrations that help the audience visualize the plan and make its details more accessible.

The *who* subsection of the management plan explains exactly who will carry out the proposal, what their specific roles will be, and what their major qualifications are. Some proposals elaborate on the proposers' capabilities in a separate section toward the end of the document; longer, formal proposals might even include minirésumés of the main personnel involved. In our sample proposal, the writers lead with short descriptions of their qualifications and resources. The writers also explain who will be working with them from the agency. Because its audience will likely use it as a reference document, this proposal includes a list of contact information—a helpful, reader-centered addition.

The writers include an organizational chart (drawn in Word) to supplement their verbal description of the group members' roles, particularly leadership roles. This part of the management plan should explain who will do what, who will be in charge of what, and how each team member will participate in the actual writing and revising of the proposed documents. The group members' leadership roles should correspond with their individual strengths. For instance, if someone has more experience and expertise in design, she or he might be in charge of those elements. If you don't have teammates, then the organizational chart could focus on you, your instructor, your contact people, and perhaps their supervisor(s).

The *how* subsection is even more important, as it lays out the solution's major deadlines and will likely be referred to in subsequent progress reports. Because your proposal involves complex collaboration, you will need to describe your plan for this collaboration, perhaps referring to the concepts discussed earlier in this chapter or in Chapter Six. The ADBF proposal writers explain in detail when and where they plan to meet with one another and with their contact person on a weekly basis—information their instructor will definitely want. Once again, if you're not working as part of a team, you only need to describe your strategies for collaborating with your instructor and agency personnel, although you should still mention obtaining feedback from in-class workshops.

The heart of the management plan is the project timeline or Gantt chart. A Gantt chart is basically a timeline in the form of a bar chart with the bars running horizontally. This type of chart can show the duration of each project phase as well as when phases overlap. Like the example in Figure 5.1 (created using the table function in Word), the major tasks on the vertical axis of the chart should correspond with the major tasks described in the solution section. The horizontal axis shows the dates on which each part of the project is expected to begin and end. The ADBF Gantt chart also includes two additional features: the deadlines for the major texts involved in the assignment and the name of the group member in charge of each major task. This is an exemplary chart not only for its detail, but also for its clarity. Although it conveys a great deal of information, the chart is easy to read and includes only necessary verbal and visual elements; it is uncluttered. The dotted lines connecting the segments to the dates and the alternating shading of the segments make horizontal and vertical grid lines unnecessary. Also eliminated were the names of the months before each date.

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Beyond providing their audience with a detailed timeline and description, writers of the sample proposal explain why this timeline is feasible and why t allotted the time they did to certain parts of the project, especially to the revi: process. In our experience, student groups rarely give themselves enough tim revise and edit; this is time-consuming, meticulous work that usually require multaneous collaboration. Be sure to build it into your plan.

Cost or Budget Section

Although it is not always relevant to a project proposal for a course, most] posals include a cost or budget section that presents in table form the propc costs of the project or the funds for which the writers are asking. Some propo break down the costs according to the project's tasks and according to the per: nel involved. If you include a cost or budget section in this or another propc rather than letting the tables speak for themselves you should also include a bal explanation of the costs and why they are reasonable or necessary.

Accessibility

Although most proposals include context-setting statements, headings, and l these accessibility strategies are even more important in longer, complex dc ments. As you will recall from Chapter Three, setting the context for a docum involves letting the reader know what it will contain and sometimes preview its major parts. The introductory summary of the ADBF proposal ends wi straightforward forecasting sentence that does just this. Because of their ler and detail, the solution and the management sections contain more specific f casting elements of their own. The solution section presents a numbered list forecasts the subsequent subheadings.

Although a list of subsections is probably the most common forecasting vice, it is not the only one. In "Techniques for Developing Forecasting St ments," Markel discusses other forecasting elements based on the journal prompts of *what, where,* and *why.* The first of these types focuses on the scope overall content of the document; the second points readers more specificall the most important parts of the remaining text; the third attempts to strengt the audience's motivation by explaining the rationale behind the text. Eacl these types, then, forecasts a different aspect of the text that follows it.

The headings in the ADBF proposal do more than indicate conventional] posal sections such as "solution" and "management"; they also tell the audi what, specifically, each section is about. The solution heading, for instance, re "Solution: Writing Two Grant Proposals to Animal Welfare Foundations." subheadings in the major sections are also informative and well crafted, indi ing specific tasks in parallel grammatical structure (e.g., *prioritizing, identify writing,* etc.). Notice, too, how the heading levels are easily discernable, how e level is consistently rendered, and how each heading or subheading is part of same visual block as its following text.

Functional Redundancy

Keith Grant-Davie, in "The Strategic Use of Redundancy in Document Design," explains how structural and informational repetition can serve important reader-based functions in a technical document such as a formal report or proposal. Redundancy can accommodate different workplace readers who may focus on different parts of a technical document, read it out of sequence, or enter it at various access points. "[I]n order to be robust enough to survive the rough conditions of workplace reading," Grant-Davie explains, "reports also need the kind of structural redundancy that engineers deliberately build into vulnerable systems" (7).

Repeating key information in different parts of a report or proposal can serve several functions, including providing multiple access points to the same information, emphasizing key points, setting the context, and creating coherence among different sections (12–13). Repeating information in the cover letter, executive summary, and introduction of a report, for example, can accommodate different readers who will focus on different sections; managerial readers may focus only on the executive summary (a summary that should be complete enough to stand alone), while technical readers may be more interested in the more detailed main report and its introduction. The same principle can apply to the introductory summary and subsequent sections of a proposal.

The introductory summary of Figure 5.1 gives readers an overview of the sections to follow, even providing the tasks around which the solution section will be organized. These same tasks will also be repeated in the solution section's own forecasting, the solution section's subheadings, and the management section's Gantt chart. Although it may seem unnecessary, this repetition will help readers remember the solution's main parts and connect the parts of the proposal. In reading the proposal the first time or referring to it later, the instructor or another reader may skip the introductory summary or another part of the report; forecasting the solution's main parts in both the introductory summary and the solution section will ensure that the reader understands the solution's structure.

Verbal–Visual Integration

As we mentioned in Chapter Three, illustrations can serve a range of purposes relative to the verbal text: They can repeat it, complement it, supplement it, summarize it, illustrate it, and so on. This relationship, along with the illustration's importance to the text's audience and argument, might shape the extent to which an illustration is integrated into the text. If a table or figure is only supplementary and not crucial to the text's main argument, it might be placed at the end without much comment. A more important visual, such as a Gantt chart in a proposal or a drawing showing a step in instructions, should be integrated more thoroughly and placed as close to its verbal explanation as possible.

As a rule, tables and figures, however important, should rarely be left to simply speak for themselves. The following three-step technique is one way to integrate them.

1. Introduce them.
2. Point out their key features.
3. Help readers draw conclusions from them.

Introducing an illustration, which usually involves referring to its specific title, enables the writer to connect it to the preceding discussion, thereby maintaining cohesion. Because visuals contain information of differing degrees of importance, it is sometimes helpful to explain to readers how to approach the illustration and what to notice about it. Finally, this surrounding explanation might suggest what the reader should take away from the visual.

Figure 5.1 effectively demonstrates this technique with the Gantt chart. The paragraph preceding the figure introduces it and its main components. Then, after the chart, the writers spend three paragraphs pointing out its most important features and emphasizing its overall message—that the project's implementation has been planned out carefully to meet the course and agency deadlines. The second paragraph after the Gantt chart also elaborates on how and why the group scheduled the project the way they did. This method of verbal–visual integration also provides functional redundancy by offering readers some choices for retrieving information.

Style Focus: Coherence

Coherence—the flow and logical connection among parts of a text—may be more important to proposals than any other technical genre. Proposals are conventionally straightforward, top-down documents. Proposal readers do not expect any surprises but expect their questions to be answered as soon as they arise, and they expect the main points and structure to be previewed up front.

In addition, proposals typically make a **problem-solution argument** that necessarily builds on itself as it goes along. The underlying causes lead to the problem, which prompts the objectives, which generate the solution, as shown below.

causes ⟶ problem ⟶ objectives ⟶ solution

Each part of this argument should lead logically and smoothly to the next. Indeed, may project proposals are rejected by evaluators because the proposed solution and procedures are not well suited to the objectives or because of some other coherence glitch. You may recall from Chapter Three that this is rhetorician Kenneth Burke's notion of form—the creation and fulfillment of desire in the audience. In *Rhetorical Grammar*, Martha Kolln also discusses coherence in terms of reader expectation. "Active readers . . . ," explains Kolln, "fit the ideas of the current sentence into what they already know: knowledge garnered both from previous sentences and from their own experience. At the same time they are developing further expectations" (42).

We recommend that you make a detailed outline of your proposal before you begin to draft. This outline should include all headings and subheadings as well as transitions connecting the sections. Including transitional elements in an outline is a good way to ensure that your divisions are arranged in the most reader-friendly order; it can also make your own writing process easier.

We now turn to a fuller lesson in creating sentence-level coherence in a proposal. Not only should each section of the proposal be tightly connected to the preceding and subsequent ones, but each sentence should also move the reader in a smooth and logical progression. To illustrate the following three strategies, we will refer to the first page of the ADBF proposal, reproduced in a slightly modified form as Figure 5.2.

Maintain a Focus and Create a Logical Progression of Ideas among a Group of Sentences

Although we do not believe that every paragraph should have only one topic indicated by an opening topic sentence (such a rigid approach doesn't account for the contingencies of the rhetorical situation), we do recommend limiting the topics you present in a paragraph to keep from overwhelming or confusing readers. This is especially important in technical and professional communication, given the hectic environments and quick-reading strategies of many users.

One technique for identifying places where you might begin a new paragraph or rearrange ideas requires that you determine the rhetorical purpose of each sentence in a passage, asking, "What is this sentence doing for readers, and how is it contributing to the passage? (You can also do this on a larger scale with paragraphs.) Then write its purpose beside it in the margins. Not only can this help you identify sentences that could be deleted or combined with others, but it can also help you identify topic shifts and the rhetorical relationships among sentences. The sentences in a paragraph should topically "hang together"; their relationships should be clear and they should move in a logical, easily recognizable progression.

For an example, let's look at the first three paragraphs of the "Problem" section in Figure 5.2. The writers originally wrote these as one paragraph. The three paragraphs move from a description of the larger community problem addressed by the agency to an explanation of how this problem has created an overcrowding and funding crisis for the shelter to a discussion of the agency's writing problem, on which the rest of the section elaborates. The writers decided to dedicate a separate paragraph to each of these rhetorical moves, calling particular attention to the focus on the writing problem with a subheading.

Create Given–New Information Chains

Creating a given–new information chain involves connecting a sentence or a paragraph to a previous one by beginning with a familiar idea. This can help give readers a framework within which to place new information and show them the logical relationship between two pieces of information. As we mentioned in the style section of Chapter Three, Kolln uses the term *known–new contract* to signify the writer's obligation to connect each sentence to what has gone before and fulfill the reader's expectations (43–44).

Figure 5.2, a modified version of the first two sections of Figure 5.1, provides some examples of this technique. In the first sentence of the second paragraph, we can see that the first part of this sentence (including the main subject and verb)

Introductory Summary

A Dog's Best Friend (ADBF), the only truly no-kill animal shelter in Orlando, desperately needs more funding for animal care operations and shelter improvements. This nonprofit organization is supported wholly by donations and is run completely by volunteers.

The organization must supplement the individual donations its raises through its newsletter and web site with grants from foundations and other funding sources. Although the shelter's volunteers are aware of its needs, they do not have the time or expertise to research and write grant proposals.

Therefore, Team Buddy proposes to produce two short grant proposals for ADBF, one for operational supplies and one for capital improvements. The project will involve meeting with the volunteers to prioritize and cost needs, identifying and researching promising funding sources, and writing and revising the proposals.

The remainder of this proposal will elaborate on the problems the project addresses, delineate the elements and steps of the project and will explain how we will carry out the project successfully.

Problem: Raising Funds for Operational and Capital Needs

ADBF is no-kill animal shelter (i.e., shelter that does not practice animal euthanasia) in Orlando with the following mission: to provide housing, food, and veterinary care to discarded dogs and cats until they can be adopted by new, responsible pet owners who will spay or neuter them.

The growing number of stray or abandoned animals in the Orlando area has caused area shelters to become overcrowded, even as more and more animals are being euthanized by county animal control facilities. Thus, ADBF is operating beyond its capacity of 100 animals, which only compounds its funding crisis.

Funding Needs and Writing Problem

ADBF is a nonprofit organization that operates solely through adoption fees and private donations by individuals (raised mostly through special events, letters, and the organization's newsletter and web site). These funding sources are not meeting the shelter's operational and capital needs, outlined in the following lists:

Operational Needs

- dog and cat food
- cleaning supplies (e.g., litter, racks, pails)
- medical and veterinary expenses
- office supplies (e.g., file cabinets, copier)
- other supplies (e.g., cages, collars)

Capital Needs

- whole-house fan
- tile for floor
- new drainage system
- more kennels and runs
- van for transporting

Figure 5.2. Sample from revised proposal

mentions the donations the organization must supplement. This ties the sentence to the previous one, which ends, in part, on the topic of donations. You can also create this type of direct chain by repeating key terms or by using pronouns with clear antecedents (i.e., nouns they refer to) in the previous sentence. Given–new information chains do not always involve the repetition or echoing of key words, though. We can find another example in the first paragraph under the "Funding Needs" subhead. Here the second sentence begins by referring to the funding sources listed at the end of the first one.

Joseph Williams suggests checking the need for more given–new chains by first underlining the first few words of each sentence in a passage and then going back and determining if the ideas expressed in these beginnings are new to readers. If they are new, they might need to be better connected to previously discussed ideas (107–108). We are not suggesting that every sentence in a passage should follow the given–new structure. This structure is less important when new ideas seem to hang together as part of a familiar topic to readers. When you are presenting complex technical information or trying to represent a causal relationship or a process that isn't obvious, however, this approach is important.

Add Transitional Words or Phrases to Reinforce Organic Cohesion

Transitional elements can clarify connections among sentences or larger elements for readers, making it easier for them to discern topics and to follow a progression of ideas. Of course, different transitional words signify different types of relationships, such as similarity, contrast, addition, clarification, illustration, summary, spatial order, and cause–effect.

Because you are probably quite familiar with transitional words, we won't list them here. What is important to remember is that they should be used not to create surface coherence on their own, but to reinforce already existing logical coherence. Williams calls the logical connection among and flow of ideas "organic cohesion" (115). In other words, just tacking a transitional word between two disconnected sentences or ideas does not create coherence. It can even increase reader confusion.

To illustrate the supplementary function of transitional words, let's look at the third paragraph in Figure 5.2. The transitional word *therefore* cues the reader to a cause–effect relationship between the two sentences. The connection between the two sentences is already apparent through their meaning, however; the first sentence describes the agency's inability to write needed grant proposals, and the second one overviews the writers' plan to do just that.

Writing Workshop Guide for Proposal

For this writing workshop, try to think like your instructor. First make a list of the questions she or he will want answered; then evaluate the proposal from a skeptical stance. Which questions does the proposal leave unanswered? Which questions could it answer more convincingly? After this initial reaction, consider the following steps.

1. Begin with the introductory summary. How thoroughly does this section overview the agency and proposal for a managerial reader? Which parts should be more or less specific? How could the forecasting be more helpful?
2. How well does the problem section focus on the organization's *writing* problem? Draw wavy lines under places that seem to depart too much from this focus. How could the writers better emphasize the problem's significance (from the readers' perspectives), more specifically explain its causes and effects, and more strategically point toward the writers' objectives and solution?
3. Now turn to the objectives in the solution section. Are they listed in parallel fashion as specific, measurable outcomes? How could they address more closely the problem and its effects?
4. How could the solution's opening better explain its scope and forecast its main parts? To what extent do these parts revolve around a writing project and its process? Where might the writers discuss how the solution is preferable to alternative solutions?
5. As you read through the solution section, write question marks beside places where you have questions about the solution's parts, rationale, or implementation (i.e., questions about what, why, and how). Draw wavy lines under sections that get away from writing and related activities.
6. Read through the solution section again, this time deleting unnecessary words, restructuring sentences with expletives, and combining sentences where appropriate.
7. How could the writers tighten the connections among the problem, the objectives, and the solution? Where could they make these relationships more explicit?
8. Which parts of the proposal could be more accessible? Where could the writers use lists or break up paragraphs? Which headings and subheadings could be more helpful and parallel? How could the headings and subheadings better correspond to forecasting elements?
9. Turning to the management section, write question marks beside places that could answer the instructors' questions more specifically. How could the writers more persuasively present their qualifications and resources? What else should the writers include about their collaboration? Where could they strengthen reader confidence by explaining the rationale and advantages of their schedule?
10. Take a closer look at the organizational chart, timeline or Gantt chart, and any other visuals in this section. How could the writers make them more informative and professional? How could the writers better integrate them into the text by placing, introducing, and explaining them? Make at least two suggestions for improving the design (including clarity) of the Gantt chart, in particular.
11. Write a *t* by places in the text that need transitional elements to connect them to previous or subsequent information. Identify the type of relationship each transition should indicate.
12. Write a *g* beside new information that could be more smoothly introduced through given–new information chains.

Activities

1. Reflect on your initial impressions of the power dynamics among the members of your group, your instructor, and the person/people with whom you will work at the agency. Write a journal entry in which you explore how these dynamics might affect your decisions as well of those of the group.
2. Consider ways in which the proposal assignment and the larger project position you in multiple, perhaps conflicting roles. Create a visual representation of these roles, presenting complexities and overlaps. List possible strategies for negotiating these roles.
3. The relationship among a problem, an objective, and a solution of a proposal can be encapsulated in this scheme: You will address problem X by achieving objective Y through implementing solution Z. Try condensing your problem, your objective, and your solution into a few words, and then fill in the preceding scheme. Write a memo to your group members suggesting ways to clarify these relationships.
4. Here's an exercise to help ensure the coherence of your proposal. Cut your initial draft into pieces, paragraph by paragraph, but only cut straight lines. Then mix the pieces up and give them to a classmate to see how accurately and easily she or he can put the text back together. This process will likely highlight parts that need rearranging or transitions.
5. Create a teamwork calendar for each member of your group, using an online scheduling tool or a calendar function in a word-processing document. Agree to share responsibility for updating the calendar, and commit to discussing changes in it at the beginning of each joint work session.

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