

# Proposal Writing 如何撰寫計劃書

Eric Lin

# Proposal      Yes or No ! ?

1. You have to write proposal for every project ?



# Q 1



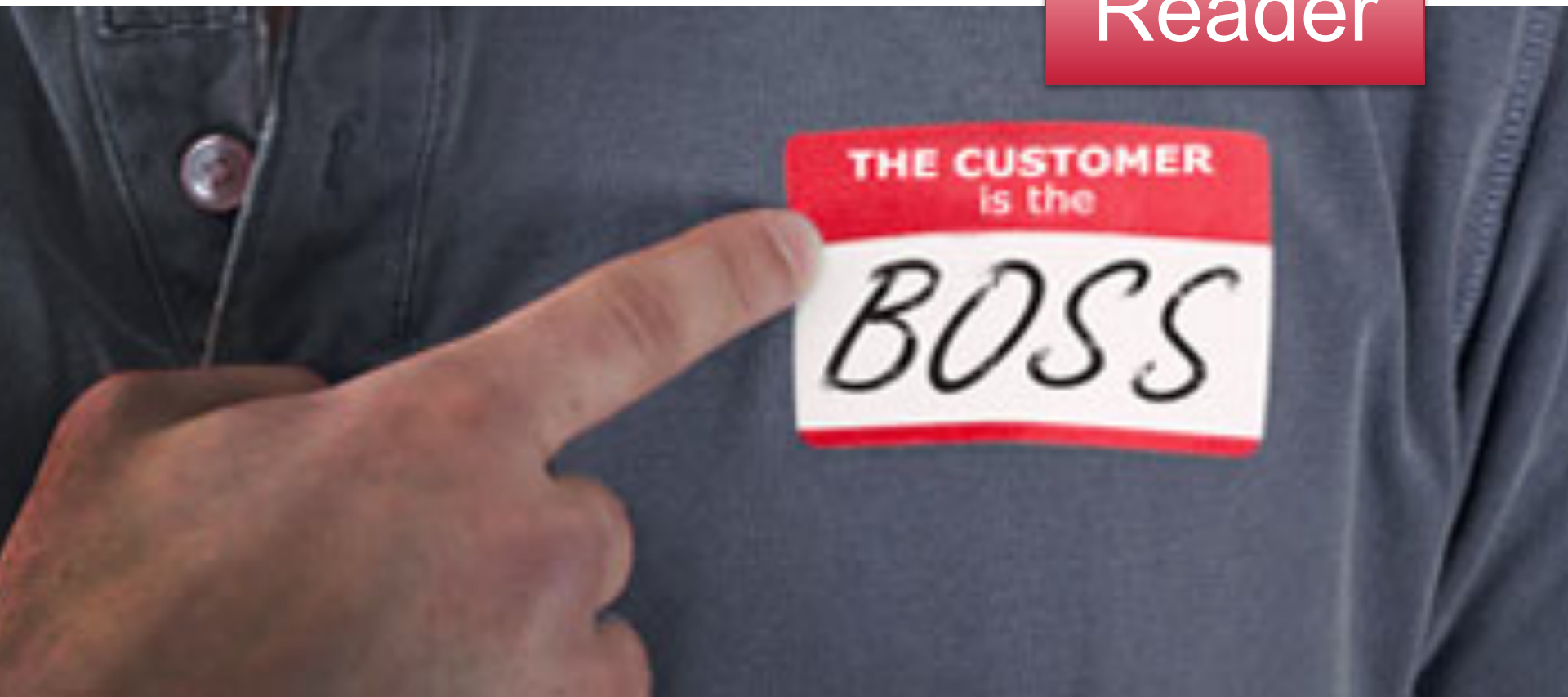
- **Yes most of the time.** Unless it's some very small scale, recurring, straight forward project ?
- Ensure **“consistent”** message and understanding internally and externally esp. 2<sup>nd</sup>/3<sup>rd</sup> layer communication for decision making.
- Enable **“knowledge transfer”** to the JC member in the future.
- **Most important:** Facilitate **“decision making”** of different parties.

# Proposal      Yes or No ! ?

2.      You need 1 proposal for each project ?



Reader



## Q 2



- We're selling a program for social benefit.
- Need **more than 1 Version** for different target audience
- Your **Boss include**:
  - Internal: Board, OC Team, Foundation
  - External: Sponsor, Guest, Supporting Organization.
- Boss leverage proposal for decision making

# Proposal    Yes or No ! ?

3.    Proposal more detail, the better ?



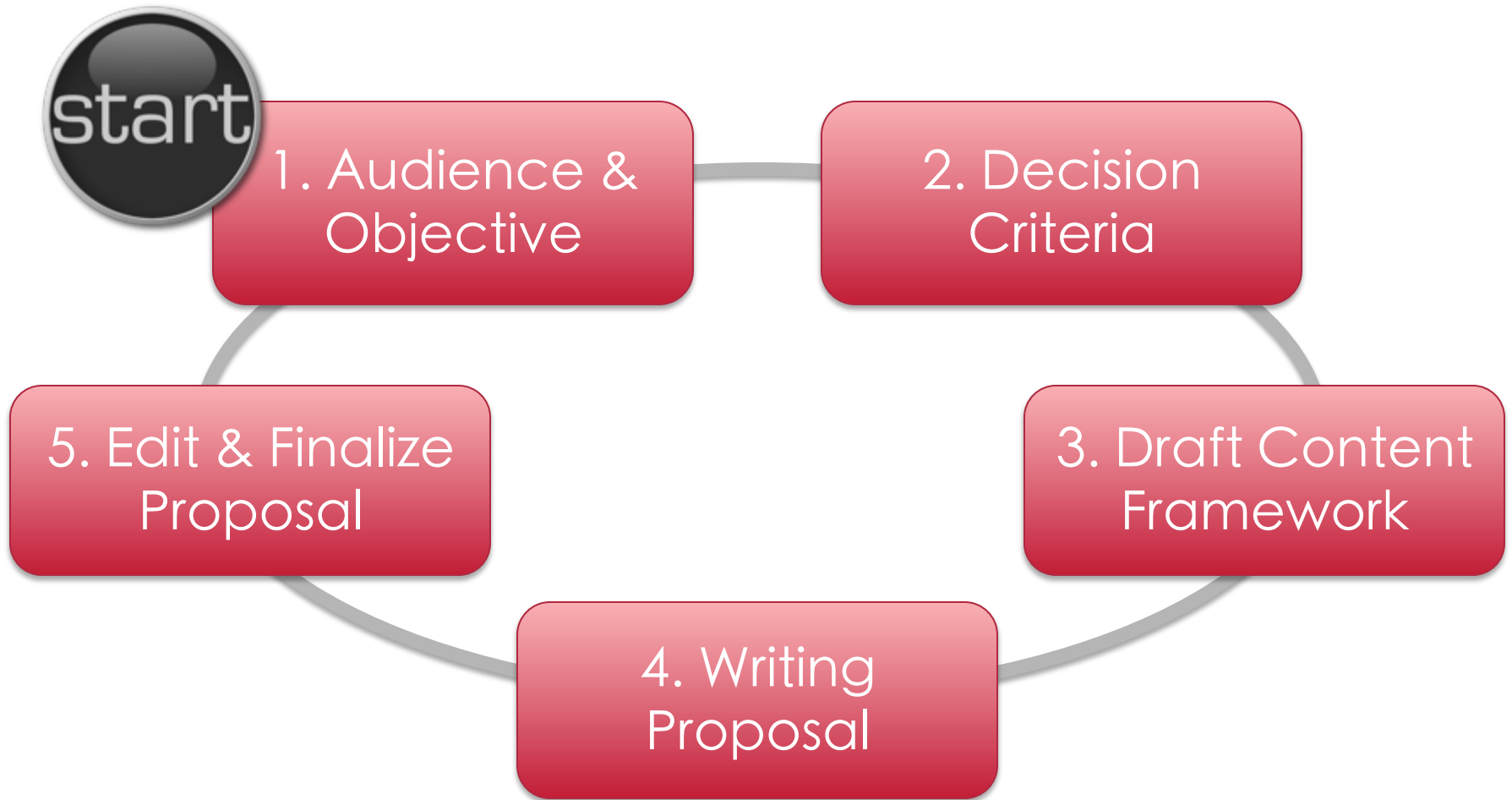
## Q 3



- Proposal key is to include
  - “精簡” (Concise – brief & easy to understand)、
  - “洽當” (Appropriate – right content & sequence)、
  - ”具說服力” (Convincing - impactful) info for decision making.
- Present the key information rather than let audience to guess



# Winning Proposal Flow



[illegible]

聯合主辦：

JCI 獅子山青年協會  
(國際青年服務委員會)

東華三院  
Tung Wah Group of Hospitals

全力策劃：

www.gigv.org

義不容「遲」2011

傑出義職人士選舉

義職●由我做起

開幕禮暨分享會

2011年4月17日  
 銅鑼灣皇室堡地下大堂

提名期

2011年4月17日 至 2011年6月4日

（義）國大使區曉雲小姐

（義）國大使區曉雲小姐

（義）國大使 SHANITY

（義）國大使區曉雲小姐

贊助機構：

新西蘭旅遊發展局  
newzealand tourism

香港青年聯合會  
Young TSP Institute

傳媒贊助：

香港電台  
radiohk

支持機構：

香港青年聯合會  
Young TSP Institute

媒體夥伴：

新華社  
newspaper

場地贊助：

香港電台  
radiohk

# Potential Reader of your Proposal ...

## (A) Internal:

- Board of Directors
- OC Team

## External:

- (B) Sponsor
- (C) Supporting / Co-Host Organization
- (D) Guest / Ambassador



# Discussion

1. What's my decision the "Proposal" try to influence ?
2. What's my decision making criteria?



**(A) JCI Internal**



**(D) Guest**



**(B) Sponsor**



**(C) Supporting  
Organization**

# Audience, Objective & Decision Criteria

Audience	Objective	Decision Criteria
(A) Internal	<ul style="list-style-type: none"><li>• Approve project &amp; resources</li></ul>	<ul style="list-style-type: none"><li>• Project align with year goal ?</li><li>• Project feasible ? Resources &amp; Implementation.</li></ul>
(B) Sponsor	<ul style="list-style-type: none"><li>• Agree the sponsorship</li></ul>	<ul style="list-style-type: none"><li>• Project meaningful? Positive for organization image?</li><li>• Sponsorship investment vs benefit?</li></ul>
(C) Supporting Organization	<ul style="list-style-type: none"><li>• Agree to participate or support</li></ul>	<ul style="list-style-type: none"><li>• Project objective consistent with organization's mission ? Has synergy ?</li><li>• Degree of support manageable?</li></ul>
(D) Guest / Ambassador	<ul style="list-style-type: none"><li>• Agree to take role &amp; attend events</li></ul>	<ul style="list-style-type: none"><li>• Project objective consistent with role of government officer(s) ?</li><li>• Project build Ambassador's image?</li><li>• Degree of exposure?</li></ul>

# Discussion

1. What's the item to include in your proposal ?
2. What's the sequence of these items?



**(A) JCI Internal**



**(D) Guest /  
Ambassador**



**(B) Sponsor**



**(C) Supporting  
Organization**





## 3. Content Framework

Items that normally exist in any version of the proposal

English	中文
Project Name	項目名稱
Project Executive Summary	項目總覽
Introduction of Hosting Organization	主辦(或合辦)機構介紹
Project Program Details	活動內容介紹 (節目簡介、日期、時間、地點、形式)
Project Objectives	活動目的 (對本會、對社會、對合作團體、對贊助商)
Project Participants / Beneficiaries	活動對象
Project History / Past Year Activities	往年活動回顧 (15)

English	中文
Promotion Plan	宣傳計劃
Media Plan	媒體報導計劃
Sponsorship Plan	贊助計劃
Sponsorship Package	贊助種類及介紹
Supporting Organization (Confirmed & Invited)	已或擬邀請合作機構 (合作形式)
Officiating Guest (Confirmed & Invited)	已或擬邀請嘉賓 (嘉賓具體工作)
Inquiry & Contact	查詢及聯絡
Financial Budget	財政預算
Organization Team Structure	籌委會成員架構
Action Plan	活動籌備規劃

# Content Framework – Key Content

Audience	Key Content	重要內容
(A) Internal	<ul style="list-style-type: none"><li>• Project Objectives &amp; Program Details</li><li>• Organization Structure</li><li>• Financial Budgets</li><li>• Action Plan</li></ul>	<ul style="list-style-type: none"><li>• 活動目的及內容</li><li>• 籌委會組成</li><li>• 財政預算</li><li>• 活動籌備規劃</li></ul>
(B) Sponsor	<ul style="list-style-type: none"><li>• Project Objectives &amp; Program Details</li><li>• Organization Introduction</li><li>• Project History / Past Sponsors</li><li>• Sponsorship Package</li><li>• Promotion &amp; Media Plan</li></ul>	<ul style="list-style-type: none"><li>• 活動目的的及內容</li><li>• 機構介紹</li><li>• 往年活動回顧及贊助關係</li><li>• 贊助種類及介紹</li><li>• 活動媒體及宣傳計劃</li></ul>
(C) Supporting Organization	<ul style="list-style-type: none"><li>• Project Objectives &amp; Program Details</li><li>• Organization Introduction</li><li>• Project History / Past Co-opt</li><li>• Sponsorship Package</li><li>• Promotion &amp; Media Plan</li></ul>	<ul style="list-style-type: none"><li>• 活動目的及內容</li><li>• 機構介紹</li><li>• 往年活動回顧及合作關係</li><li>• 活動合作形式</li><li>• 活動媒體及宣傳計劃</li></ul>



# Content Framework – Key Content

Audience	Key Content	重要內容
(D) Guest – Officiating Guest	<ul style="list-style-type: none"><li>• Project Objectives &amp; Program (cum detail program time)</li><li>• Organization Introduction</li><li>• Guest Role &amp; Work</li><li>• Project History</li></ul>	<ul style="list-style-type: none"><li>• 活動目的及內容 (詳細活動時間及簡單流程)</li><li>• 機構介紹</li><li>• 嘉賓詳細工作</li><li>• 往年活動回顧</li></ul>
(D) Guest - Ambassador	<ul style="list-style-type: none"><li>• Project Objectives &amp; Program (cum detail program time)</li><li>• Organization Introduction</li><li>• Ambassador Role &amp; Work</li><li>• Project History</li></ul>	<ul style="list-style-type: none"><li>• 活動目的及內容 (詳細活動時間及簡單流程)</li><li>• 機構介紹</li><li>• 大使詳細工作</li><li>• 媒體及宣傳計劃</li></ul>

# 4-5. Drafting & Editing Tips

## 1. Customized Project Objectives

- To Officiating Guest – echo back government official / Committee's key promoting policy or value
- To supporting organization – echo back co-opt organization's mission.
- To sponsors – e.g. add objective like help corporate to build CSR.
- Amend wording & sequence

## 2. Leverage Past History to enhance credibility

- Past co-opt, sponsorship, media exposure and guest attendance.
- LOM's other big project
- JCIHK activities

# 4-5. Drafting & Editing Tips

## 4. Add target Audience logo / name proposal

- Show respect

## 5. Enhance Project profile by

- Update when key guest, supporting organization confirmed.
- Add inviting guest name but clear state it's (擬邀請)

## 6. Simplify, Clear & Prove Read

- Use simple English or wording, try to shorten your sentence if can deliver same idea.
- Try to use point form
- Avoid use JCI acronym e.g. IA, CD which is hard to understand by outsider
- Prove read to avoid typo

# 4-5. Drafting & Editing Tips

## 7. Sending

- Together with covering letter
- Prefer sending PDF version
- Follow up with phone call to ensure proposal receipt by targeted parties