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### The Facts

- How you write your proposal depends on your audience. Academic proposals are very different from public library proposals.
- Money rules. You can't change the economic reality. There is a fixed amount of money available. You have to live in the real world. You are arguing for a piece of the pie.
- Deadlines and formats are omnipotent. You can't change the date of board meetings or budget deadlines. Finish early and give yourself time for review and reflection.
- Don't take yourself out of the game. One wrong fact or error can eliminate your proposal. Check your numbers, check them again then have someone else do the math.

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### The Facts

- Have your facts straight- Research and numbers win many arguments. You're librarians! Do what you do best!
- If room or time allows, be prepared with examples of thought leaders or best practices in your industry that support your position or request.
- Proofread five times- You, a colleague, a friend, a family member, a supervisor. In a competitive environment, one typo can take your proposal out of consideration.
- Test drive your proposal with someone who has a similar position as your primary audience.

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### The Facts

- Understand the reality of the situation. If you don't have the full picture- budget, political, economic, etc., then get it. Ask questions. Get help from:
  - Colleagues
  - Former board members or decision makers
  - Get publically available budgets
- Don't surprise the boss. If you are making a case to a board or higher level supervisor, your boss can make the difference. Share your proposal, ask for advice and refinement. They know things you don't about the budget or the organization.
- Bullet proof the details- is it legal? Does it violate existing organizational or system rules? Understand the human resource, legal, purchasing, etc., implications.

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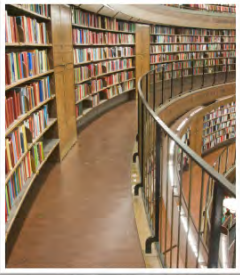
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### Specific tools for different types of decision makers



- Your written proposal must cover all the bases. You may not get a chance to explain or present. It must stand alone.
- Different Audiences:
  - Individual- Your Boss
  - The Board
  - A Committee

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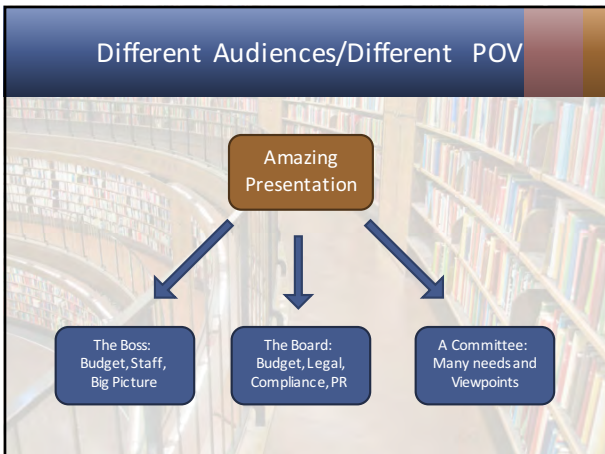
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**Individual/The Boss**

- 1 How will it make their life easier?
- 2 How will it benefit the dept. or division?
- 3 How will it address a specific concern?
- 4 How will it help other employees?
- 5 How will it help the customer?

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**Individual/The Boss**

- 6 How will it impact the budget?
- 7 Will it save money or be more efficient?
- 8 If it expands the budget, explain the benefit.
- 9 Address the negatives or opposition.
- 10 How will it help the customer?

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**The Board**

- 1 How will it benefit the Organization?
- 2 Will it address a specific concern they have?
- 3 If it expands the budget, explain the benefit.
- 4 Address the negatives or opposition.
- 5 How will it help the customer?

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**The Board**

- 6 Will it improve the Organization's image?
- 7 Are there hidden costs? (legal, HR, etc.)
- 8 Does it create efficiencies?
- 9 Who else is doing this?
- 10 Are there other successful examples?

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**A Committee**

- 1 How will it benefit the Organization?
- 2 How will it address their specific concerns?
- 3 How will it impact the committee members?
- 4 Does someone win or lose?
- 5 Is there something for everyone?

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**A Committee**

- 6 How will it impact the budget?
- 7 Will it save money or be more efficient?
- 8 If it expands the budget, explain the benefit.
- 9 Address the negatives or opposition.
- 10 How will it help the customer?

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### Presentation Basics



- Take extra copies. Assume everyone lost theirs.
- Know who is in the room.
- Dress in your most comfortable power clothes. Not casual but don't let clothes be a distraction.
- If possible, visit the location or venue of the proposal. Don't be surprised that you are presenting in front of the room!
- Practice your presentation
- Role play in advance. Ask someone who has no stake play the part of the board or committee and ask questions.

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### Presentation Basics

**If you are presenting a PowerPoint or or projecting overhead, Don't let technology defeat you!**



- Charge your laptop and take your power cord.
- Take a thumb drive with the presentation in case there is a problem with your computer.
- Test the projector and computer ahead of time if possible.
- Turn off your email.

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### Presentation Basics

**If you are presenting a PowerPoint or or projecting overhead, Don't let technology defeat you!**



- Update your computer the night before so you don't get update notices in the middle of the presentation.
- Close every program on your computer before you leave for the presentation.
- Turn you phone all the way off or leave it in your desk or the car.
- Be prepared to present from printed copies. Don't get upset or complain about the technology.

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### Presentation Basics

**You're passionate and excited about your proposal, but:**



- Don't get defensive if the committee or board asks lots of questions. That's their job.
- Be prepared for questions and assume there will be many.
- Make the ask! Be very clear what you want and ask for it in the summary.

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### Written Presentations



- Don't go overboard with binders or fancy designs or graphics. It should look nice but professional.
- Don't use small fonts and margins to fit more info into the number of pages allotted. Remember the golden rule- "The one with the gold makes the rules." If they say two pages, double spaced with one inch margins they mean it.
- Don't write above or below your audience. If you are an academic and your audience is not, remember that.
- Design the car, don't invent the wheel! Assume facts in evidence!

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### Written Presentations



- Make your point in an executive summary then back it up with facts.
- Don't teach unless the concept is groundbreaking and revolutionary.
- Present facts graphically if possible, Use appendices when necessary.
- Don't write "War and Peace." People have to read your proposal to act on it.
- Think ahead. Show the future financial impact of your proposal over time.
- Make the ask! Be very clear what you want and ask for it in the summary.

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Summary

- Understand the weaknesses of your proposal
- Be prepared to compromise, know where there is room for negotiation. Be prepared with "must have" and "deal breaker" points in your proposal.
- Know the answers to these questions:
  - Can it wait a year?
  - What are the risks of doing it or not doing it?
  - Would you give up something else to get your proposal approved?
- Put yourself in charge- would you approve your proposal even if you had to cut something else?

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Questions?

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