

How to Do an Effective Proposal Report

1. Why Do a Proposal Report?

There are many reasons for every citizen group to produce a report that sets out their proposals in detail. **First**, the decision-making processes of both governments and corporations are usually based upon detailed research, policy and program reports, so if you produce a report you fit into the processes you are trying to effect. If you only produce a brief pamphlet, or poster, or Action Alert, you are almost guaranteed to have very little influence over government or corporate decision-making processes.

Second, producing a detailed proposal report will help you figure out what you actually want, and by researching the problem you are addressing you will likely discover facts and figures you didn't know, and possible solutions you may not have thought of that may work better than the solutions you were thinking of proposing.

Third, producing a detailed proposal report makes it clear to governments and corporations exactly what changes you want to laws, regulations, policies, programs, or their other activities. If you do not set out clearly what you want in detail, governments and corporations won't know what you want and it will be impossible for them to give it to you.

Fourth, producing a detailed proposal report makes it clear to the media, and the public, what changes you want, allowing them to decide whether they support what you want. If you are not clear, you allow the media and the public to criticize you for things you may not even be asking for or advocating.

Fifth, producing a detailed proposal report takes away the opportunity for those who oppose you to criticize you for being vague, indecisive and unprofessional. If your proposal report is credible, it will help you force your opponents to respond to your proposals.

Sixth, producing a detailed proposal report gives you an opportunity to receive media coverage of your campaign.

However, all of these positive reasons for producing a detailed proposal report can turn negative if your proposal report is not credible. Generally, effective proposals for change must detail where we are, where we should be, how we get from here to there, and all the costs and benefits of getting from here to there. Set out below are more key guidelines to producing a credible, effective proposal report.

2. Key Steps to an Effective, Credible Proposal Report

(a) Prove There is a Serious Problem

There are thousands of citizen groups in Canada, each tackling different problems and each trying to get governments, corporations, other powerful institutions and/or individuals to change something. Governments, corporations, other institutions and individuals are swamped by these

calls for changes, and many of them react based on how serious they believe each problem is. If your proposal report does not prove that the problem you want addressed is serious, it is unlikely that your problem will be addressed.

It is not enough just to say "X problem is very serious and governments / corporations / Canadians must do something." You have to prove it. A good technique to use is to imagine that you are presenting your case in court before a jury of experts. Have you included in your proposal report enough clear evidence of the problem to convince this jury that there actually is a problem, a serious problem?

Remember, we're talking about a jury of experts. They are not going to be convinced by a survey of the members of your citizen group, all of whom believe that there is a serious problem. They are also not going to be convinced by just any survey, poll, or other study you mention in your proposal report, because not every survey, poll or study is done properly, or is broad enough to actually prove the existence of a problem.

Try to anticipate what your opponents will say about your evidence of the problem. There may be a study with conclusions that support your belief that there is a serious problem, but you know that the study was not done as well as it could have been. If you use the study in your proposal report to support your call for changes, you may actually damage your chances of winning those changes because your opponents will be able to attack your credibility, and the credibility of your proposal report.

When the problem you are addressing is in the areas of economics, culture, political reform, societal values or social welfare, remember that in these areas it is very difficult to prove anything for sure. Not that it is easy to prove anything for sure in the areas of biology, medicine, or other sciences, but there are more widely accepted methods for proving things in these areas.

If you find yourself in a battle over the whether there is a problem, a good thing to do is to call for a study of the problem, a study that uses the best methods for determining whether there is actually a problem. In the short-term this may seem like a step away from getting the problem addressed, but if the study proves that there is a serious problem, then it will help you actually win the changes you want.

Another key technique is to start with basic principles of Canadian society and then measure the current situation against those principles. For example, principles of democratic government include transparency and accountability so if a government is secretive or a public official unaccountable, there is a problem because democratic governance principles are being violated. Principles of the marketplace are that consumers have a right to be fully informed about all the effects of the products and services they buy, so if information is missing there is a problem because this principle is being violated.

(b) Prove Your Proposed Solutions are the Best in the World

Even if you prove beyond a shadow of a doubt that there is a serious problem, you also have

to prove that your proposed solutions are the best way to solve the problem.

Again, imagine that you are presenting your case in court before a jury of experts. Have you included in your proposal report enough clear evidence of the problem to convince this jury that there actually is a problem, a serious problem?

A good way to convince decision-makers that your solution is the best in the world is to research what other countries (or states or provinces or cities in other countries) have done to solve the same problem to find out how well their solutions have worked. However, if the solution you propose is being used in a country with a poor international reputation, or with a society completely different from Canada, saying that Canada should do what that country does will usually not convince Canadian decision-makers. Usually, proven solutions used in the U.S., European countries, Scandinavian countries, and Australia or New Zealand are the best examples to use when trying to convince Canadian decision-makers to act on your solution. Using an example of an proven solution from a country that Canadians would regard as being not as developed as Canada can also be effective as it can embarrass Canadian decision-makers because Canada is "behind" that country in addressing the problem.

Again, remember that studies about the effectiveness of solutions can, if not done properly, actually have a negative impact on decision-makers because they are not credible.

And again, measure all possible solutions, and your proposed solutions, against basic principles. Which solutions are consistent with the principles of transparency, accountability, right to know, progressive approach, freedom to choose, public interest protection, public participation in decision-making?

Finally, ask yourself the following questions about your proposed solutions:

- is it a solution that the government/corporation or other institution can actually act on? (for example, municipal, provincial and federal governments all have different powers, and can't act on some problems because of limits on their powers);
- does the solution solve the cause of the problem, or is it a "band-aid" solution that covers up, but does not solve the problem?
- what are all the costs of the solution, and all of the benefits?
- what are possible unintended, indirect costs of the solution, and unintended, indirect benefits?
- who will pay the costs of the solution, and who and what will benefit from the solution?
- how long will it take to implement the solution, and is the problem so serious that a quicker solution is needed?
- how can the success or failure of the solution be measured, who is going to do the measuring, and how much will it cost?

(c) Prove that Your Solutions Have Public Support

Generally, politicians are concerned about public support because they want to be elected again in the next election, and corporations are concerned about public support because they want people to buy their products and services. Unfortunately, both politicians and corporations

constantly try, and have been somewhat successful, to change the political and economic system of Canada so that they stay in power, and people buy their products and services, even if people don't actually support them.

However, many politicians still need public support to be re-elected, and many corporations still need public support to make a profit. As a result, if you can show that the public will not support a politician, government or corporation unless they solve the problem you want solved, it can often be an effective way to push them to solve the problem.

Conducting a survey and including the results in your proposal report is one of the most often used methods for showing that the public believes there is a serious problem, and believes that your solution is the best way to solve the problem. Again however, the survey must be done properly or it will be ignored because it is not credible.

(d) Use an Effective Report Format

Your citizen group can do the best research proving that there is a problem, that your proposed solutions are the best in the world, and that your solutions have public support, but if you put all this information in a huge, hard-to-read, poorly written proposal report it will usually have little effect on governments, corporations, the media and the public

Public officials in governments, and corporate executives, are generally busy people and they often won't take extra time trying to figure out what your report says, what changes you want, nor what your evidence is that proves that what you want is the best thing to do.

People in the media are also very busy, and they almost definitely won't take time trying to figure out your report as they usually have to write or broadcast a story about the report by the end of the day.

So if you want your proposal report to be effective, you have to put it in a format that is easy to read. The following sections, in the following order, should be in every proposal report you produce:

- **Table of Contents** - the table of contents gives section and sub-section titles and page numbers so that people reading the report can find what they want quickly and easily;
- **Summary** - the summary contains the key points from every section of the report, without all the details;
- **Summary of Recommendations** - while the summary contains the key points about the problem and support for your proposed solutions, the summary of recommendations sets out your recommendations in one, easy to read list;
- **Detailed Description of the Problems** - this section sets out the problem in detail, with a separate sub-section for each part of the problem;
- **Detailed Description of Proposed Solutions** - this section sets out your proposed solutions in detail, with a separate sub-section for each solution;
- **Appendices** - if the report refers to a survey, another report, or some

other detailed document, don't include the document in the middle of the report because it will make the report more difficult to read -- instead, summarize the document in the report and then include the full document (or the key parts of it) at the end of your report as an appendix.

In addition, effective reports have clear section and sub-section titles that summarize the content of each section. Clear section and sub-section titles make it easy for people reading the report to find sections they want to read, and also mean that even if they just read the Table of Contents they will understand the main points of the report.

For example, if your report was about the problem of banks poor treatment of people with low incomes, you would have section and sub-section titles (after the summary sections) like the following:

- I. How Several Barriers Limit Access to Basic Banking Services
 - (a) Banking is an Essential Service
 - (b) Financial Institutions' Past Failure to Provide Essential Banking Services to All Canadians
 - (c) The Federal Government's Response: Inadequate to Solve the Problem
- II. How to Ensure a Right to Access to Basic Banking Services: Follow the Lead of Other Jurisdictions
 - (a) How Access to Essential Banking Services is Ensured in the U.S.
 - (b) How Access to Essential Banking Services is Ensured in Europe

Finally, give your proposal report a catchy title, but remember to have a clear title as well so that people will know from the title what the report is about. A good technique is to have a short catchy title, and then a longer sub-title that explains what the report is about. For example, a good title and sub-title for the banking services report outlined above would be *Access Denied: How To Ensure Access to Basic Banking Services for All Canadians*.