Designing Proposals

Overview

This chapter discusses how to develop a persuasive visual design for a proposal. The chapter will meet the following objectives:

1. Discuss the importance of design in a proposal.
2. Discuss the application of gestalt theory to design.
3. Define four principles of design for crafting effective page layouts.
4. Describe the use of a five-step "design process" for inventing, revising, and editing pages.

"How You Say Something . . ."

The old saying, "How you say something is what you say," is truer now than ever in proposal writing. Not long ago, document design was considered a luxury in proposals, not a necessity. More recently, though, the availability of desktop publishing software has heightened the importance of design in all documents. Readers *expect* proposals to be visually interesting and engaging. They expect proposals to make a positive first impression. And, they expect the design of a proposal to help them read the document more efficiently by highlighting important ideas. These days, people cringe when a proposal with little or no design crosses their desk, because they quickly realize that their needs as readers were not anticipated by the writers.

Design is more than simply making a proposal look nice. An effective design increases the readability of the text by highlighting important information and allowing the readers to process the text in a variety of different ways. Moreover, the design of a proposal establishes a particular tone for the document—an image. Much as clothing and body language establishes an image for a public speaker, a proposal's design signals the attitude, competence, and quality of the bidders to the clients. Of course, the content is still the most important feature of a proposal. Even the best design will never hide a weak understanding of the situation or a flawed plan. However, design can make a positive impression on the readers while emphasizing your ideas. It can incline the readers favorably toward your document before they even read a word.

In the field of rhetoric, a branch called "Visual Rhetoric" studies the persuasive effects of design on readers of documents. In this chapter and the next, we will apply some of the principles of visual rhetoric to designing proposals.

How Readers Look at Proposals

Occasionally, readers will study a proposal from front to back, starting at the introduction and ending with the conclusion. In most cases, though, people read proposals at different levels, skimming some sections and paying closer attention to sections that directly affect their interests. Most readers, for example, make an initial surface-level scan of the proposal. They look at the executive summary, read the introduction, and then scan each major section's headings and opening paragraphs. Their aim is to gather an overall sense of the structure and argument of the proposal.

Readers will then start to pay closer attention to the sections of the proposal that affect them most. Accountants responsible for money issues will pay attention to sections that handle the costs and the budget. A technical expert will look closely at the details of the plan to see if it is feasible. Decision makers will check whether the proposal correctly describes their current situation and offers a feasible plan to address that situation. They will also pay more attention to any descriptions of the bidders' qualifications.

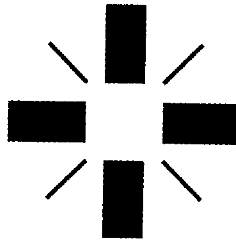
Eventually, some of the readers may study the proposal from front to back, especially if they are deciding whether to accept it. While they are reading front to back, they will want the proposal to use visual techniques to highlight the main points of each section.

The challenge of good design is to permit the readers to choose how *they* want to read the proposal. The proposal should be designed in a way that helps them process the text at different levels, while making the text usable in a variety of different possible contexts. Good design gives the readers easy "access points" where they can enter the text from a variety of different places for a variety of different reasons.

Four Principles of Design

Good design is not something to be learned in a day. Nevertheless, you can master some rather basic principles of document design that will help you make better decisions about how your proposal should look. In this section, we will discuss four rather simple principles of design that were derived from *gestalt psychology*, an area that has deeply influenced the graphic arts (Bernhardt 1986; Moore and Fitz 1993). The basic assumption of gestalt design is that humans do not view their surroundings passively (Arnheim 1964, 28). Rather, they instinctively look for relationships among objects, creating wholes that are more than a sum of their parts.

FIGURE 10.1
The Whole Is More than a Sum of the Parts



For example, in Figure 10.1, most people see a square, and they might even see an X in the middle of the square. According to gestalt design, viewers see a whole that is more than the sum of the parts in the graphic.

Like this diagram, design in a proposal allows readers to also visualize larger relationships among parts. Visual design can help them draw the natural connections among these parts to see the proposal as a greater whole.

The four design principles we will discuss in this chapter are **balance, alignment, grouping,** and **consistency**. These principles are based on gestalt psychology, especially Kurt Koffka's work in the area. The actual gestalt principles are a bit hard to remember, and not all of them pertain to designing a text. As a synthesis of gestalt theory, the four principles in this chapter are designed to provide a simpler handlist of terms with which you can master document design for proposals.

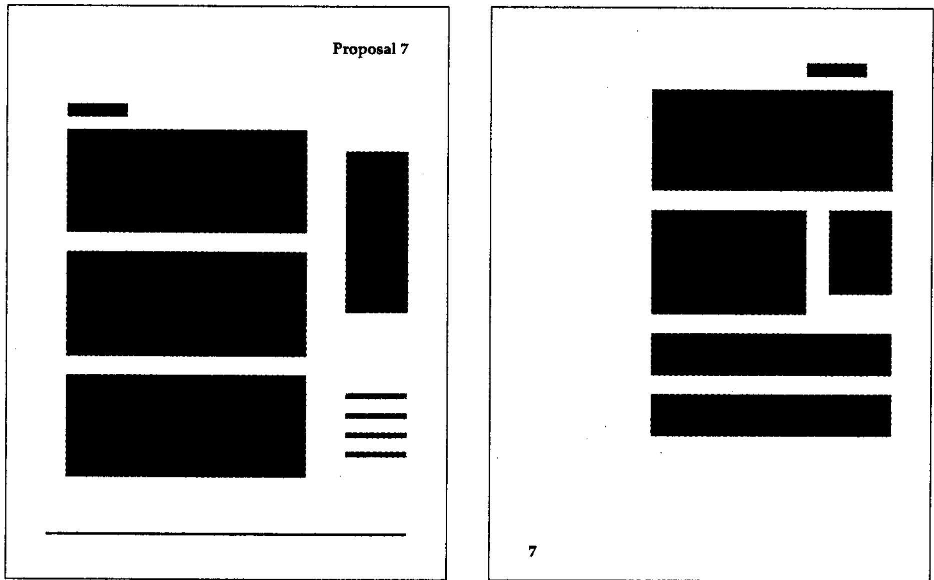
Design Principle 1: Balance

On a balanced page, the design elements offset each other to create a stable feeling in the text. To illustrate, imagine a page is balanced on a point. Each time we add something to the left side, we need to add something to the right side to maintain balance. Similarly, when we add something to the top of the page, we need to add something to the bottom. Figure 10.2, for instance, shows an example of a balanced page and an unbalanced page.

The text on the right is unbalanced because the items on the right side of the page are not offset by items on the left. Meanwhile, the page is top-heavy because the text is bunched up toward the top of the page. The page on the left, however, feels stable because the design elements have been balanced evenly on the page. Whereas readers would find the unbalanced page uncomfortable to read, they would have little trouble looking over the balanced page on the left.

One thing to note, however, is that a balanced page is not necessarily a symmetrical page. In other words, as shown in the left page in Figure 10.2, the two halves of the page do not need to mirror each other, nor do the top and bottom need to be identical. Instead, the sides of the page should simply offset each other to create a sense of balance.

FIGURE 10.2
Balanced and Unbalanced Pages



When balancing a page layout, graphic designers will talk about the "weight" of items on a page. What they mean is that some items on a page attract the readers' eyes more than others. A picture, for example, has more weight than printed words because readers' eyes tend to be drawn toward pictures. Likewise, colored text or graphics weigh more than black and white, because readers are attracted to color. An item placed on the right side of the page will have more weight than an object placed on the left side, because Western readers tend to read from left to right. In other words, an item on the right side of a sheet of paper creates more tension (has more weight) than something on the left.

Here are some general guidelines for weighting the elements on a page:

- Items on the right side of the page weigh more than items on the left.
- Items on the top of the page weigh more than items on the bottom.
- Big items weigh more than small items.
- Pictures weigh more than written text.
- Graphics weigh more than written text.
- Colored items weigh more than black and white.
- Items with borders around them weigh more than items without borders.
- Irregular shapes weigh more than regular shapes.

When designing a standard page for a proposal, the challenge is to create a layout that allows you to keep the text as balanced as possible. In some cases, graphic designers want to lay out unbalanced pages, because unbalanced pages create a sense of tension and unease in the readers. Writers of proposals, however, have little use for an unbalanced page design that makes the readers feel tense and uneasy.

Using Grids to Balance a Page Layout

A time-tested way to devise a balanced page design is to use a page "grid" to evenly place the written text and graphics on the page. Grids divide the page vertically into two or more columns. The examples in Figure 10.3 show some standard grids and how they might be used.

In most cases, as shown in Figure 10.3, the columns on a grid do not translate into columns of written text. The grid is simply used to structure the text evenly, allowing columns of text or larger pictures to overlap one or more columns.

Why use a grid in the first place? It might be tempting to merely expand the margin on the right or left side in an ad hoc way. The problem with this approach is that readers subconsciously sense the page's irregular spacing. As gestalt design implies, the readers will subconsciously look for regular patterns or shapes. If no grid is used, the readers will try to imagine a grid anyway, thus creating more reading tension than necessary. Furthermore, in the long run, a grid-based page design offers more flexibility. An ad hoc layout may work for a couple pages, but as charts, margin text, and graphics are added, the page design will grow increasingly difficult to manage.

One solution, of course, is to use a simple one-column design. In a one-column format, graphics and text are usually centered in the middle of the column (see Figure 10.4).

There is, of course, nothing wrong with a one-column grid. A one-column grid tends to be rather traditional and word dominant, and it provides limited flexibility on the placement of graphics. For example, as shown in Figure 10.4, few options exist for the placement of a graphic on the right page. Nevertheless, this page design is easy to use.

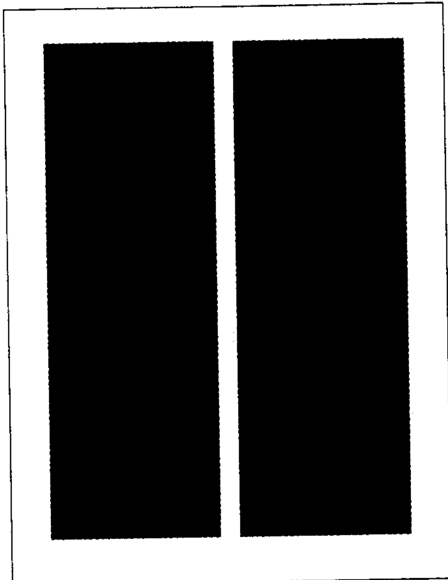
Other Balance Strategies

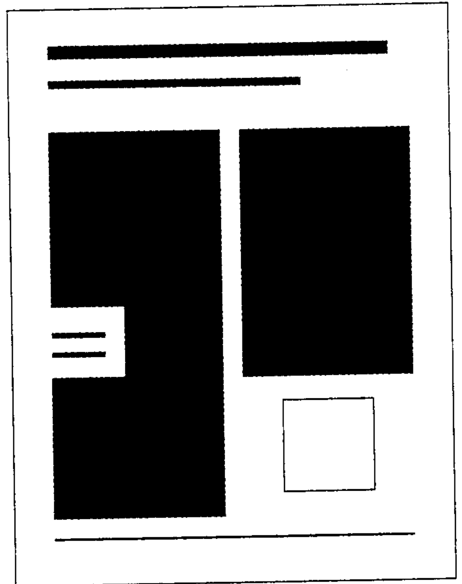
With the advent of desktop publishing, we now have the ability to use design features that were once limited to large publishers. In proposals, writers now use design features like pullouts, margin comments, and sidebars to enhance the reading of the body text.

Pullouts Quotes or paraphrases can be *pulled out* of the body text and placed in a special text box to catch the readers' attention. Essentially, pullouts are used to break up large blocks of text and create access points for the readers. Magazines, for example, frequently use pullouts when a picture or graphic is not available to break up a page of words. A pullout should draw its text from the page on which it appears. Often, the pullout is framed with rules or a box, and the text wraps around it (see Figure 10.5).

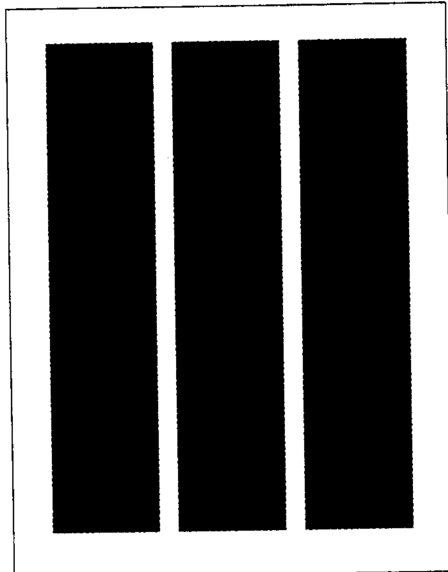
Margin Comments Key points or highlight quotations may be summarized in the margin of the proposal. When a grid is used to design the page, one of the margins often leaves enough room to include an additional list, offer a special quote drawn from the body text, or provide a simple illustration. In a large proposal, margin comments might even be used to remind the readers where

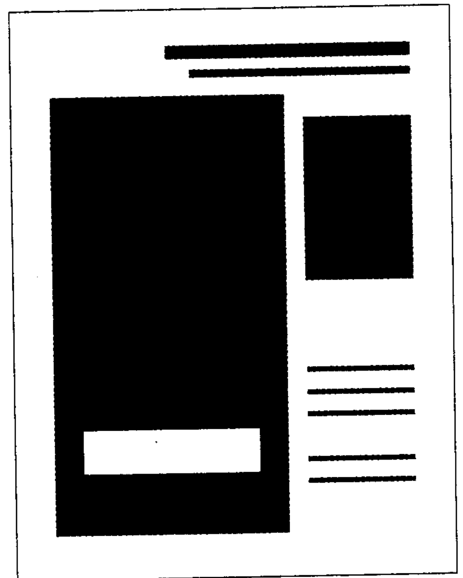
FIGURE 10.3
Grids and their Uses





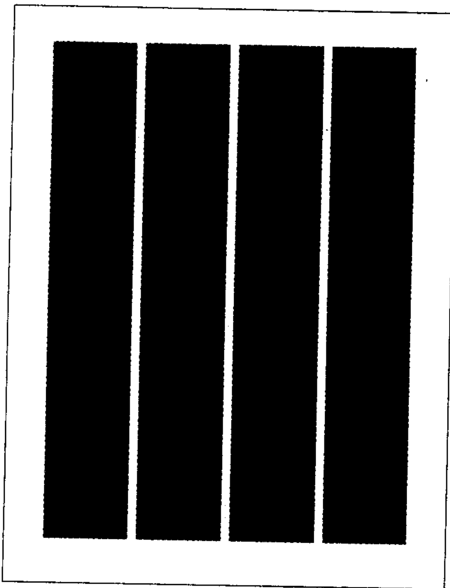
Two-column grid

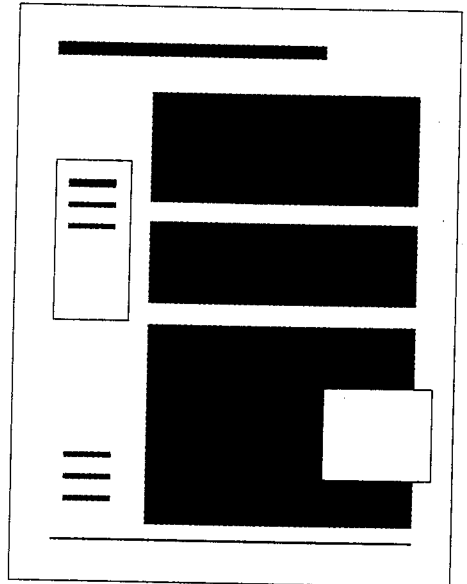




Three-column grid

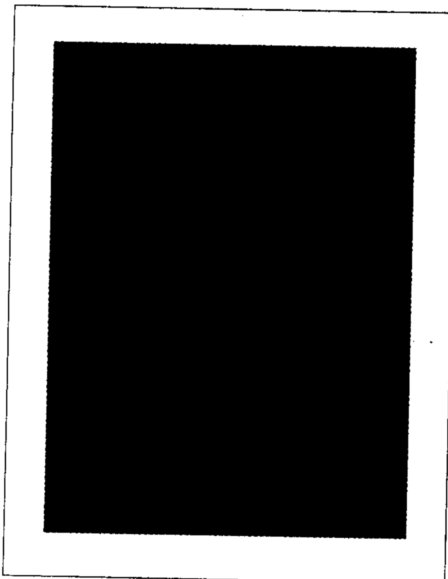
FIGURE 10.3
Continued

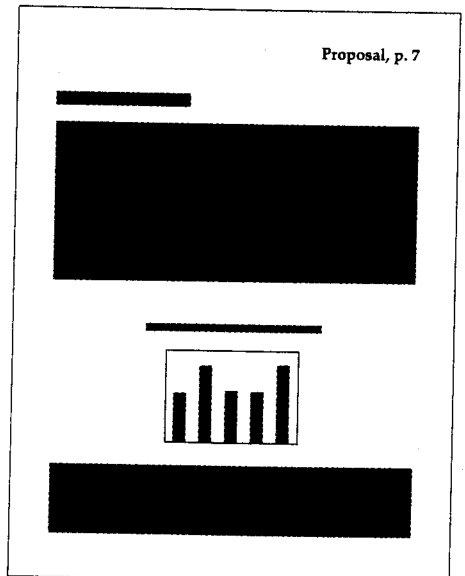




Four-column grid

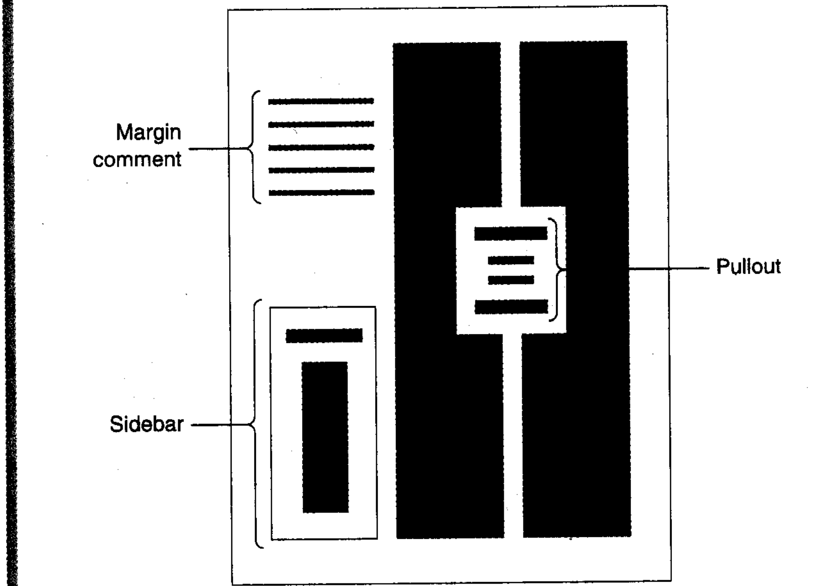
FIGURE 10.4
A One-Column Page Design





One-column grid

FIGURE 10.5
Other Visual Techniques Used to Balance Pages



they are in the proposal by restating the outline of the proposal and highlighting the main points of the section they are about to enter (see Figure 10.5).

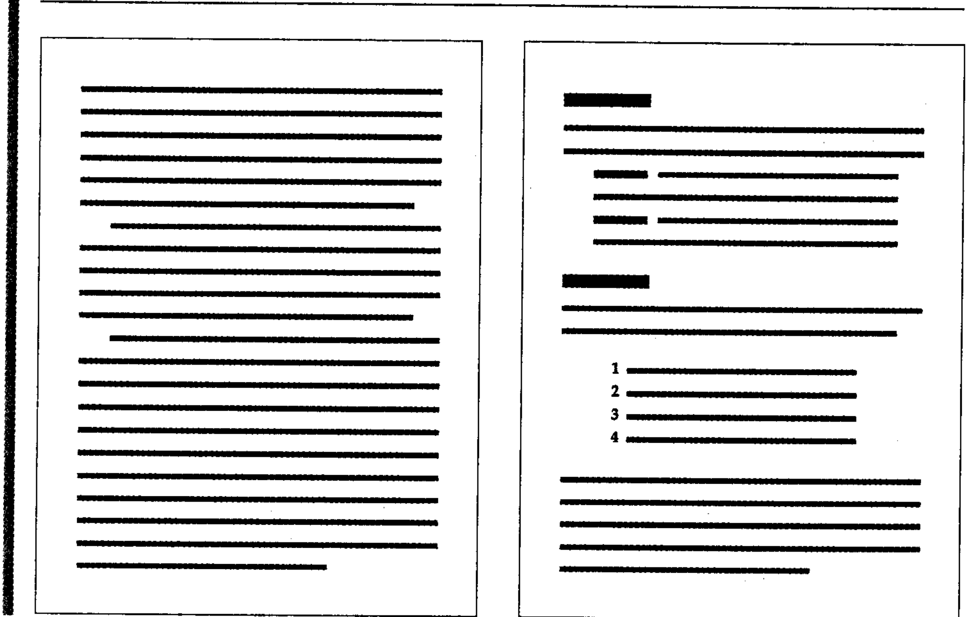
Sidebars Examples that reinforce the text but are not essential to its understanding may be placed in a sidebar. In a magazine article, for example, a sidebar might include a special profile of an important person who is mentioned in the main article. Or, it might provide a "story within the story" that illustrates an important point made in the body text. In proposals, sidebars could be used to explain a process in more detail or describe a previous project that was a success. Sidebars should never contain essential information that the readers require. Rather, they offer supplemental information that enhances the readers' understanding.

Pullouts, margin comments, and sidebars can be used to balance a text and break up large blocks of words. Meanwhile, they enhance the reading of the proposal by reinforcing main points and providing supplemental information.

Design Principle 2: Alignment

Alignment is the use of vertical "white space" to help the readers identify the various levels of information in a proposal. The simplest alignment technique is the

FIGURE 10.6
Using Lists as Alignment Tools



use of an indented list to offset a group of items from the body text. An indented list signals to the readers that the listed items are intended to supplement the text in the surrounding paragraphs. In Figure 10.6, for example, the page on the left gives no hint about the hierarchy of information in the text, making it difficult for a reader to scan the text. The page on the right, meanwhile, uses indented lists to clearly signal the hierarchy of the text. The indented material is easily recognized as supplemental information.

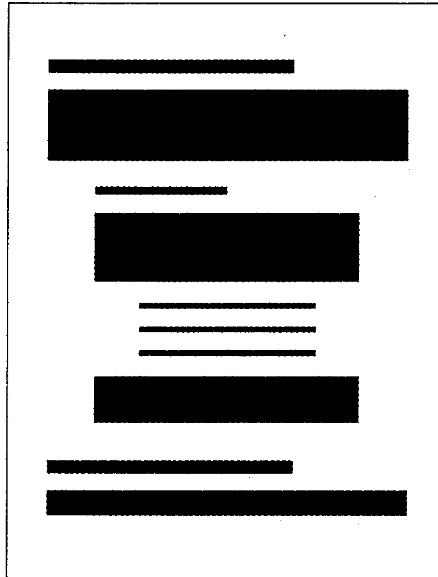
In a proposal, blocks of text can be aligned to show the hierarchy of information. Examples or explanatory information can be indented to signal that they are to be considered separately from the body text. Figure 10.7 illustrates how information can be indented to signal various levels in the text.

Essentially, alignment uses white space to create vertical lines in the text. The readers will mentally draw the vertical lines into the page, seeing aligned elements as belonging to the same level of importance.

Design Principle 3: Grouping

Even the most patient readers have difficulty trudging through large, undivided blocks of text. Grouping techniques help break the text down into smaller parts that are more comprehendible, especially for scanning readers. The principle of grouping

FIGURE 10.7
Alignment that Shows Hierarchy of Information



is based on the assumption that readers comprehend better when information is divided into smaller chunks. A large block of text, perhaps a one-column page with no headings and no indentation, seems uninviting to a reader and difficult to read. Grouping allows you to break up the page by providing the readers more white space and giving them a variety of access points at which to enter the text.

The simplest type of grouping is paragraphing, because paragraphs break a larger stream of written text into blocks of ideas. There are more advanced ways, however, to group information on a page, including using headings, rules, and borders.

Using Headings

The primary purpose of headings is to signal new topics to the readers, but they also cue the readers into the overall organization of the proposal. With a quick scan of the headings in the document, the readers should be able to easily identify how the information in the proposal is organized.

In a larger document like a proposal, headings should highlight the various levels of information for the readers. A first-level heading, for example, should be sized significantly larger than a second-level heading. In some cases, first-level headings might use all capital letters (all caps) or small capital letters (small caps) to distinguish them from the font used in the body text. To make the first-level heading stand out, some writers even prefer to put them inside the left-hand margin or "hanging" into the left-hand margin (see Figure 10.8).

FIGURE 10.8
Levels of Headings

FIRST-LEVEL HEADING

This first-level heading is 18 pt. Times, boldface with small caps. Notice that it is significantly different from the second-level heading, even though both levels are in the same typeface. This heading is also *hanging,* because it is placed further into the margin than the regular text. Use consistent spacing above and below each head (e.g., 24 pts. above and 18 pts. below).

Second-Level Heading

This second-level heading is 14 pt. Times with boldface. Usually, less space appears above and below this head (perhaps 18 pts. above and 14 pts. below).

Third-Level Heading
This third-level heading is 12 pt. Times italics. Often no space appears between a third-level heading and the body text, as shown here.

Fourth-Level Heading. This heading appears on the same line as body text. It is designed to signal a new layer of information without standing out too much.

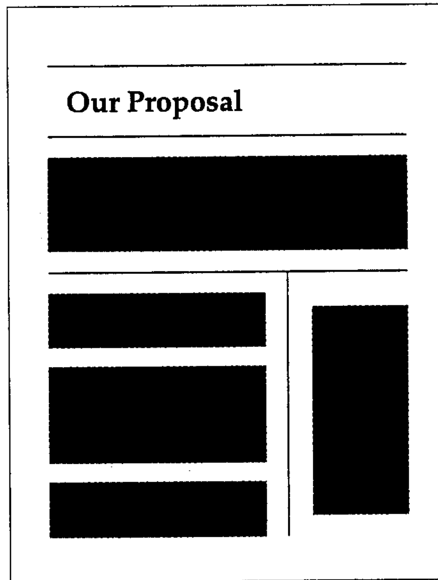
Second-level headings should be significantly smaller and different than the first-level headings. Whereas the first-level headings might have used all caps, the second-level headings might capitalize only the first letter of each word (excluding articles and short prepositions) (e.g., "Marketing for the MTV Generation"). First- and second-level heads are often made boldface. Third-level headings might be italicized or placed on the same line as the body text itself. Figure 10.8 shows various levels of headings.

Early in the proposal writing process, you should decide how the proposal will use headings. Headings are powerful tools for breaking information down into groups; however, when used improperly they can create unneeded chaos in a proposal. They need to be used consistently throughout the document.

Using Horizontal and Vertical Rules

In page design, horizontal and vertical rules are straight lines that can be used to carve the proposal into larger blocks. Rules should be used judiciously in a proposal, because they can impede the progress of the reader through the text. Too many rules make the document look like its been chopped up into small bits

FIGURE 10.9
Using Rules to Divide a Page into Groups



and pieces. But, when used properly with headings or to set off an example, horizontal and vertical rules can help the readers identify the larger groups of information in a proposal.

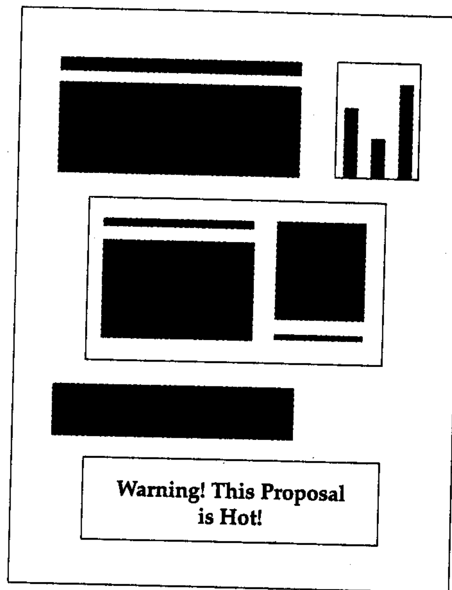
Figure 10.9 illustrates how rules can be used to divide a page into larger parts. As shown in Figure 10.9, the horizontal and vertical rules carve the text into larger chunks, ensuring that the readers will see them as groups. On the other hand, rules can restrict how the reader views the page by framing off text into isolated blocks of information.

Using Borders

Like rules, borders are also used to group text into units. Borders, however, tend to be even more isolating than rules, because they enclose text completely, setting it off from the rest of the information on a page. Borders are best used to set off examples, graphics, pullouts, and sidebars that supplement the body text. For example, Figure 10.10 shows how a border can be used to set off an example or sidebar on a typical page.

Borders are helpful tools for grouping information. However, like rules, they can be overused. If borders are used sparingly in a proposal, they will draw the readers' attention to the information inside the border. When borders are used too often, however, the readers will grow immune to their grouping effects, and they will tend to skip reading the information inside.

FIGURE 10.10
Using Borders to Group Information



Design Principle 4: Consistency

The final design principle, consistency, simply suggests that each page in the proposal should be designed similarly to other pages in the document. Specifically, each page should follow a predictable pattern in which design features are used uniformly throughout the proposal. For example, the typefaces used in the proposal should be consistent. Lists should use consistent numbering schemes for sequential lists and consistent icons for nonsequential lists. Meanwhile the same grid should be used throughout the proposal as a template.

There are four techniques available for giving each page a consistent look: headers and footers, typefaces, labeling, and lists.

Headers and Footers

Even the simplest word processing software can put a header or footer consistently on every page. As their names suggest, the header is text that runs across the top margin of the page, and the footer is text that runs along the bottom of the page. In many proposals, headers and footers include the title of the proposal and perhaps the bidding company's name. They also invariably include a page number. Page numbers are critical in proposals, because they help the readers refer to various parts of the proposal with ease. If there are no page numbers available, the readers find themselves struggling to tell others where to look in the proposal, instead of merely telling other readers "go to page X."

Headers and footers can also include design features like a horizontal rule or even a company logo. If these items appear at the top or bottom of each page of the proposal, the document will tend to look like it is following a consistent design.

Typefaces

As a rule of thumb, a proposal should not use more than two different typefaces. Computers have given us access to hundreds of different typefaces from Arial to Zingbats, but you do not need to use them all in your proposal. Instead, most page designers will choose two typefaces that are very different from each other, usually one *serif* typeface and one *sans serif* typeface. A serif typeface, like Times or Bookman, has small tips (serifs) at the ends of main strokes in the letters. A sans serif font is one that does not include these small tips. This body text is set in 10 pt. Palatino—a serif font. Figure 10.11 shows the difference between a serif font (Palatino) and a sans serif font (Helvetica). Notice how the letters in Palatino include the additional tips on each letter while Helvetica does not.

There are no hard rules for typeface usage, just guidelines. To readers in North America, serif fonts like Times or Palatino tend to look more formal and traditional, while sans serif fonts like Helvetica seem informal and modern. Because sans serif fonts look modern, some page designers will use them in headings, headers, and footers to make their proposal look more progressive. Designers often prefer serif fonts in the body text, because North American readers usually report that they find sans serif fonts harder to read at length.

To complicate matters further, international readers like those from the United Kingdom are accustomed to sans serif fonts like Helvetica appearing in the body text. They, consequently, find sans serif fonts easier to read at length.

Your choices of typefaces, of course, are up to you. Whatever your choice of typefaces, however, you should use them consistently throughout the proposal.

FIGURE 10.11
Serif and Sans Serif

This paragraph uses the Palatino typeface. Serif typefaces are often used in traditional-looking texts, especially for the body text. Studies have suggested inconclusively that serif typefaces like Palatino are more legible, but there is some debate as to why. Some researchers claim that the serifs create horizontal lines in the text that make serif typefaces easier to follow (White, p. 14). These studies, however, were mostly conducted in the United States, where serif fonts are common. In other countries, such as Britain, where sans serif fonts are often used for body text, the results of these studies might be quite different.

This paragraph uses Helvetica, a sans serif typeface. A sans serif typeface tends to look more modern and progressive to most readers. However, sans serif text tends to be harder to read at length, at least for readers in the United States. Generally, sans serif typefaces are best used in titles and headings.

Labeling of Graphics

Graphics, such as tables, charts, pictures, and graphs, should be labeled consistently throughout the proposal. In most cases, the label above a graphic will include a number (e.g., Table 5) and a title (e.g., Forecast of Future Sales). In some cases, though, the number and title might appear below the graphic. Again, the important thing is to be consistent. You should always choose a consistent typeface for labeling and then locate the labels consistently on each graphic. In Chapter 11, we will further discuss how to use graphics in proposals.

Sequential and Nonsequential Lists

The design of lists is a decision that should be made up front while planning a proposal. In proposals, lists are useful for showing a sequence of tasks or a group of similar items. However, when lists are not used consistently in a proposal, they can also create substantial confusion for the readers.

A simple way to design lists is to remember that they tend to fall into two basic categories: sequential and nonsequential. Sequential, or numbered, lists are used to present items in a specific order. For instance, in a proposal, sequential lists might handle a list of tasks or they might rank various objectives. In these lists, numbers or letters are used to show the order or hierarchy of the items. Nonsequential lists, on the other hand, use bullets, checkmarks, or other icons to show that the items in the list are essentially equal in value.

Lists are handy tools for making information more readable, and you should look for opportunities in your proposal to use them. When you include a list, though, make sure you are consistent in your usage of sequential and nonsequential lists. In sequential lists, numbering schemes should not change in the proposal except for good reason. For example, you might choose a numbering scheme like 1), 2), 3). If so, do not number the next list 1., 2., 3., and others A., B., C., unless you have a good reason for changing the numbering scheme. Similarly, in nonsequential lists, use similar icons when setting off lists. Do not use bullets with one list, checkmarks with another, and pointing hands with a third. These inconsistencies only confuse the readers while making your proposal seem unpolished.

To avoid these problems with lists, decide up front how your proposal will use lists. Choose one style for sequential lists and another for nonsequential lists and stick with those two styles throughout the proposal.

The Process of Designing a Proposal

Balance, alignment, grouping, consistency. Once you know these four basic principles, designing a proposal becomes much easier. These four principles form the basis of a "process" that you can use to design almost any text. In their book, *Designing Visual Language,* Charles Kostelnick and David Roberts (1998) suggest that a design process "includes several kinds of activities, beginning with invention, followed by revision, and ending with fine-tuning" (23). Like writing, Kostelnick

and Roberts point out, designing a text is a fluid process in which the designer cycles among the different parts of the process until the design is completed.

Following a design process becomes especially important when you are working with a team on a proposal. Your team should start out by making some or all of the design decisions *before* team members go off to write theirs part of the proposal. With design issues settled up front, each team member can then conform his or her part to the overall design of the proposal, making assembly of the proposal much easier at the end. Moreover, each team member can help find or create visual items like the graphics or sidebars that will make up the proposal's design. If your team waits until the proposal's due date to consider the design of the proposal, chances are good that you will need to resort to the lowest common denominator—that is, little or no design.

To create effective layouts for proposals by yourself or with a team, you can follow this five-step process:

1. Consider the rhetorical situation.
2. Thumbnail a few example pages.
3. Create a design stylesheet.
4. Develop a few generic pages.
5. Edit the design.

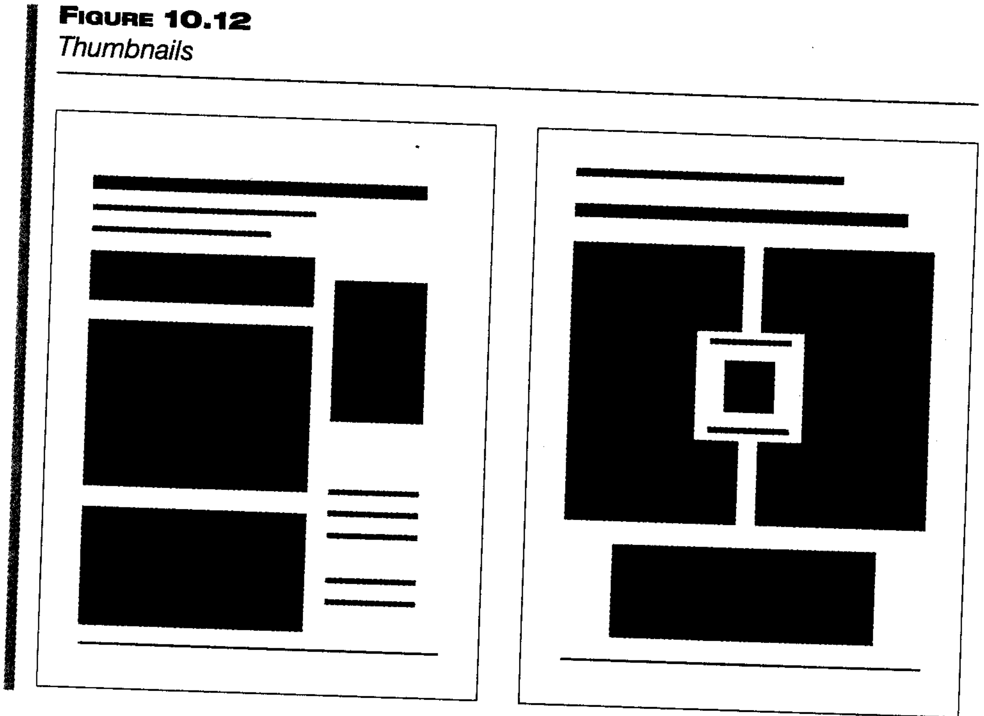
Step One: Consider the Rhetorical Situation

Start out the design process by revisiting your understanding of the *rhetorical situation,* which you developed at the beginning of the proposal writing process. Specifically, you should pay attention to the unique characteristics of the primary readers and the physical context in which they will read the proposal.

Different readers will respond to a document's design in various ways, so you want your proposal to align with the primary readers' values and attitudes. For instance, if the primary readers are rather traditional, the proposal should use a conservative design that includes a simple layout, a classic font like Times, and limited amounts of graphics. If the readers are more progressive or trendy, the design can be a little more creative. In this case, perhaps you might use more graphics. You might consider using an unusual font for the headings, or perhaps you might add a splash of color. If you know the topic is an emotional one for the readers, positive or negative, perhaps some photographs might reinforce or defuse those emotions by showing the people or issues involved in the proposal.

Second, the context in which the proposal will be used is also important. Pay special attention to the physical factors that will influence the reading of the proposal. For example, if you know that the readers will look over the proposal in a large board meeting, then you will want to make the text as scannable as possible with clearly identifiable headings, plenty of lists, and a generous use of graphics to reinforce the proposal's main ideas. You might also add pullouts or margin comments to state your main points in ways that pop off the page. On the other hand, if you think each proposal will receive a close reading, perhaps fewer

FIGURE 10.12
Thumbnails



graphical elements and more paragraphs would give the text a more detailed, grounded feel.

Step Two: Thumbnail a Few Example Pages

With the readers and context in mind, sketch out a few possible page layouts that would suit the rhetorical situation. Graphic artists will often start designing pages by sketching a few "thumbnails" freehand or on a computer (see Figure 10.12). Thumbnails take a few moments to draw, but they will allow you to look over possible designs before you commit to a particular page layout—saving you time in the long run.

While thumbnailing designs, pay special attention to the balance of the page. Will the page use two, three, or four columns? Where will graphics appear on a page? Will there be space for margin comments, pullouts, or sidebars? How large will the headings be on the page? Where will a header or footer be placed? Most designers sketch a few different possible layouts and then decide which one seems to best suit the rhetorical situation. If you are working with a team, provide the other team members with a few different possible layouts and let them choose the best one.

Once you have developed a basic pattern for the body pages, thumbnail a few possible cover pages for the proposal. Allow yourself to be bold with the cover.

Nothing puts readers in a positive mood better than an active, professional cover (the "everything centered" cover is a real yawner). You can add energy to your cover by increasing the size of the text, moving the text to the left or right side of the page, adding in a graphic, and so on. All these features will give momentum to the proposal while reassuring the readers that the proposal is not going to be boring.

Step Three: Create a Design Style Sheet

Style sheets are records of your design decisions. After sketching out some thumbnails or creating a page layout, you should write down some of your decisions about various design elements of the document. These features can be handled on five levels:

Line Level	font, font size, and use of italics, bolding, and underlining
Paragraph Level	spacing between lines (leading), heading typefaces and sizes, indentation, justification (right, center, left, full), sequential and nonsequential lists, column width
Page Level	columns, headers and footers, rules and borders, use of shading, placement of graphics, use of color, pullouts, sidebars, page numbers, use of logos or icons
Graphics Level	captions, labeling, borders on graphics, use of color, fonts used in tables, charts, and graphs
Document Level	binding, cover stock, paper size, color, weight, and type (glossy, semi-gloss, standard), section dividers

Sometimes, making all these design decisions can be a daunting task. Nevertheless, in a larger proposal, a style sheet actually saves time, because writers can refer to it when they have a question about specific design issues. When working with a team of other writers, you can simplify the writing process considerably by asking each writer to follow the style sheet as closely as possible. That way, when the whole proposal comes together, the final draft will require far less editing of the design.

Style sheets are living documents that can be modified as the proposal is developed. Certainly, a style sheet is never something to be slavishly followed. Rather, it should be modified as the writing of the proposal creates new challenges for the design.

Step Four: Develop a Few Generic Pages

Graphic designers will tell you that the best time to design a document is before the words are written. In most cases, however, writers start thinking about design after they have completed an outline or drafted a few pages of the proposal. At this point in the writing process, they can bend and shape the text into a generic

page layout. They can create a *template* that can be used to structure all the pages in the proposal.

With your thumbnails sketched and a style sheet created, use some or all of the proposals' content to create a template that each page in the proposal will follow. As you add content to your design, you will likely discover that some of your earlier style decisions need to be modified to fit the needs of a real document. Mark these modifications down in your style sheet.

Each page should follow the same basic pattern as the other pages. Avoid the temptation to make small alterations to accommodate the demands of individual pages. Instead, if one page's design needs to be changed, you might need to go back and alter the overall template to accommodate these modifications. By creating a few generic pages, you can find places where alterations are needed *before* you start designing the whole proposal.

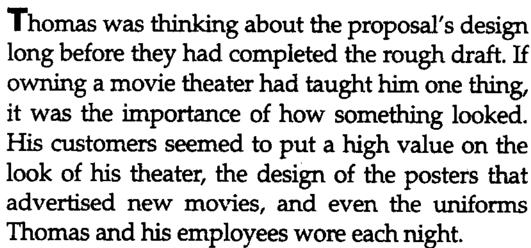
Step Five: Edit the Design

Like writing, editing is an important part of design. After you have completed designing the text and adding the written text and graphics, you should commit some time exclusively to revising and editing the proposal's design. While adding text and graphics, you more than likely stretched your original design a bit. Now it is time to go back and correct some of the smaller inconsistencies that came about as you put the text together.

To help you edit, look back at the rhetorical situation, your thumbnails, and your style sheet. Does the final design fit the readers and the context in which they will read the proposal? Does the final design reflect the visual qualities you wanted as you sketched out your thumbnails? Are there any places where the final design needs to be revised to fit the style sheet? Or, does the style sheet need to be modified to fit decisions you made as text and design were meshed together? In the end, make sure the final, edited design fits the rhetorical situation with which you started the writing process.

Last Word

In the struggle to pull a proposal together, often at the last minute, there is a tendency to see design as a luxury that can be ignored in a pinch. It's the content, not the design that is important, right? In reality, though, how you say something is what you say. If you hand in a proposal that uses a one-column format with double spacing and underlined headings, the readers are going to wonder whether you, your team, or your company have the creativity and commitment to quality required for their project. After all, how a proposal looks says a great amount about how your company does business. In the long run, it is worth the effort to spend the few hours required to design an attractive, functional proposal.



Thomas was thinking about the proposal's design long before they had completed the rough draft. If owning a movie theater had taught him one thing, it was the importance of how something looked. His customers seemed to put a high value on the look of his theater, the design of the posters that advertised new movies, and even the uniforms Thomas and his employees wore each night.

So he decided to design the proposal himself. Looking over the notes he had written about the rhetorical situation, he began to think about what kind of design would suit the primary readers of the proposal and contexts in which they would consider the proposal's ideas. Specifically, he knew that the primary readers were the other business owners in the Elmdale Hill district. Most of them were like Thomas—working hard to keep their businesses afloat. They would only have limited time and energy to read a proposal.

Most of them were also enterprising and progressive. Many business owners had left high-paying jobs in traditional corporations to start their own restaurant, book store, clothing store, etc. They were people who liked to feel different than others—like they were out on their own. Thomas also realized, though, that these people were worried about their businesses. He wanted to create a design that would reflect the seriousness of the subject while also appealing to the progressive entrepreneurial spirit that motivated the proposal's primary readers.

From his rhetorical situation worksheets, Thomas also recognized that the readers' context would be important to the design of the proposal. The primary readers would probably first look over the proposal during slow times at their businesses. Thomas could even visualize them at the cash register, sneaking glances at the proposal between customers. Others would take the proposal home to study it after business hours. Either way, the design of the proposal would need to accommodate a scanning reader who was not going to have the time or energy to commit full attention to the text.

The readers would also need to use the proposal at the organizational meeting described in the proposal. Thomas knew the design must highlight important points, so the business owners could use them as talking points in the meeting.

With these readers and contexts in mind, Thomas began thumbnailing a few possible pages for the proposal (Figure 10.13). He decided to use a two-column page, because that layout would decrease the width of each column, making the text easier to scan. It would also allow him to add in some pullouts to highlight important points and ideas in the proposal. He also wanted to include a box on the first page—maybe every page—that would highlight details about the organizational meeting.

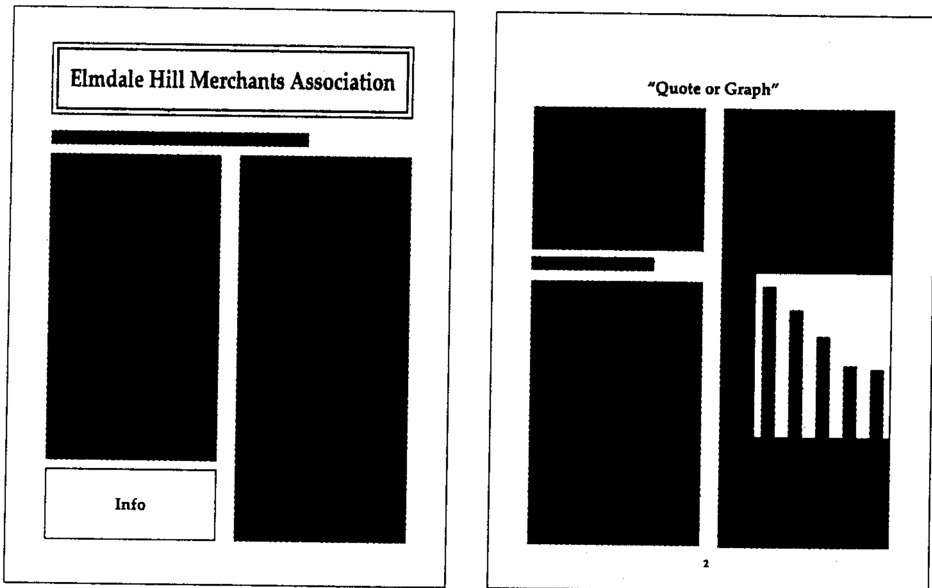
Thomas decided that the first page would double as a cover page. He also didn't want the cover page to seem too formal, because he thought a formal cover page would invite the readers to save the proposal for later when they had more time—and more than likely never read it. Instead, he believed, a title on the top of the first page might invite the readers to start scanning the text immediately.

When he finished thumbnailing some pages, Thomas began developing a simple style sheet. He knew a small proposal like this one did not need an extensive style sheet; however, he wanted to jot down a few of his ideas for fonts, type sizes, and graphics. That way, John, Karen, and Sally could conform their parts of the proposal to a standard design. Figure 10.14 shows the style sheet that he started with.

From prior experience, Thomas knew his decisions in the style sheet would need to be modified as the text was put into the proposal. But, creating a style sheet took only a couple minutes, and it gave him a good idea of how the final proposal would look.

With his thumbnails and style sheet in hand, Thomas began creating a couple generic pages using the rough draft of the proposal they had written to this point. As he designed the generic pages, it became obvious that he needed to col-

FIGURE 10.13
Thumbnails for Elmdale Hill Proposal



lect a little more information before he could completely design the proposal. First, he wanted to add some quotes from other merchants across the top of each body page. For example, he wanted to include a quote like, "I'm feeling added pressure due to the Wheatmill Mall," or, "Advertising on my own is too expensive." He felt these quotes on each page would add a human dimension to the proposal while reinforcing the themes in the written text. Second, Thomas needed some charts, tables, and graphics for the body pages. Karen had already volunteered to make these graphics, but Thomas knew he needed to tell her about the fonts, labels, and borders he wanted her to use.

Thomas kept designing and redesigning the proposal as the proposal was written and edited. The final design required some compromises and modifications to his original ideas. Nevertheless, when he looked back on the original rhetorical situation they laid out at the start, he felt his design met the readers' needs. You can see Thomas's final design for the Elmdale Hill proposal in Chapter 12.

FIGURE 10.14
Thomas's Style Sheet

Line Level
Body Text: 12 pt. Times
Italics: Use with titles and to emphasize

Paragraph Level
Leading: Single Space
Headings: Level 1, 16 pt. Arial; Level 2, 12 pt. Arial bold; Level 3, 12 pt. Arial italics
Justification: Full
Sequential lists: 1. 2. 3.
Nonsequential lists: boxes

Page Level
Columns: Double
Header: none
Footer: centered page number on each page, including cover
Borders: around information box only, 1 pt. lines
Pullouts: quote across top of each page, 18 pt. Arial, centered
Graphics: Tables and graphs fit into one column, or go across both columns at top or bottom of page.

Graphics Level
Font: Arial 10 pt.
Labeling: Title and number across top of graphic in 12 pt. Arial bold
Borders: 1 pt. border around each graphic, if needed
Captions: none

Document Level
Binding: Plastic Comb
Cover stock: Same as body paper
Paper: 25 lb, off-white standard (Ivory), 8.5 x11 in.

Questions and Exercises

1. Choose three full-page advertisements from a magazine. How did the designers use balance, alignment, grouping, and consistency to design these advertisements? How is the rhetorical situation (subject, purpose, readers, context, objectives) reflected in the design of these pages?
2. Analyze the design used in a proposal. Write a memo to your instructor in which you discuss how the proposal's design uses the principles of balance, alignment, grouping, and consistency. Then, note where the proposal strays

from these principles. Based on your observations, do you think the proposal's design is effective? How might it be improved?

3. Many proposals are now being placed on the Internet or in CD-ROM format. Find a proposal on the Internet. How did the writers handle the proposal's onscreen design? How does the design of an online proposal differ from paper-based proposals? What are some strategies writers might follow to make proposals more readable on a computer screen?
4. For a practice or real proposal of your own, go through the five-step design process discussed in this chapter. Study the rhetorical situation from a design perspective, then thumbnail a few pages for your proposal. Write out a basic style sheet. Develop some generic pages for your proposal. And finally, add content into your design.
5. Study the page layouts used in other kinds of documents (newsletters, posters, books). Can any of these designs be adapted for use as models for designing proposals? Why might you try different designs that break away from the more traditional designs used in proposals?
6. Look at the designs of the example proposals in Chapter 12. How do these significantly different designs change the tone and readability of the text?