

QIP: A Prepared Editable Proposal Template

Assistance for Acupuncturists to Appeal to an Existing Organization to Incorporate Traditional Chinese Medicine

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Purpose, Intent of QIP

To provide a general outline and editable template for Acupuncturists in need of developing a formal written proposal to bring any modality of Traditional Chinese Medicine (TCM) to an existing organization or medical clinic.

Needs Analysis, Gaps, Reason for QIP

Many hospitals, medical centers and clinics, as well as non-medical organizations such as office parks and schools may benefit from acupuncture and other medical services provided by a Licensed Acupuncturist. Offering a well written proposal can make the organization's leadership aware of the benefits/need, offer plans to integrate/host/hire an acupuncturist, and develop professional respect for the acupuncturist.

Target Audience/Group

Licensed Acupuncturists seeking to bring TCM to an existing organization or medical clinic.

Description of Intervention, Solution, End Product to Fill Needs/Gaps

Use of a prepared proposal template developed by a fellow acupuncture professional can ease the pain of writing and improve outcomes. The proposal template would give freedom for the individual acupuncturist to elaborate on their specific vision. This template would be largely fill-in the-blank in style.

Method(s) of Sharing End Product with Targeted Audience

This QIP is to be published on the AOMA Graduate School of Integrative Medicine website. Three documents are to be provided: 1) an introduction and guide (.pdf), 2) a sample of a written proposal (.pdf), and 3) an editable proposal template (.docx).

Summary, Conclusions

Professional level writing with inter-professional language can build trust in the acupuncture profession and the professional themselves, closing the professional gap and unfamiliarity between the acupuncturist and other professionals, while poorly written work can be damaging. Use of a prepared proposal template developed by a fellow acupuncture professional who has had success in writing and presenting proposals can ease the pain of writing and improve outcomes.

Proposal Writing for the Licensed Acupuncturist: Overview and Guide

“Thaw with her gentle persuasion is more powerful than Thor with his hammer. The one melts, the other breaks into pieces.”

-Henry David Thoreau

Overview

The purpose of this document, the sample proposal, and the editable proposal is to provide guidance for an entrepreneurial Licensed Acupuncturist to produce an excellent written proposal to take to an existing organization such a community clinic, a large hospital network, a tech-business campus, university, and so on. The following pages will discuss how to approach writing a proposal, what to include or exclude, and how to use the provided editable template to produce a well-written professional document.

Introduction

Online and in bookstores, there are many excellent resources on how to create business proposals. What is lacking is help to create a proposal specifically for bringing acupuncture and the other modalities a licensed acupuncturist may offer to an existing organization. This editable template is designed to jump-start that writing process. It should cut your writing time in half by getting the ball rolling on wording, offering a format for organizing and presenting information, and providing some advice along the way.

The reports at BetterProposals.io offer research-based tips for business proposals in general. It is highly recommended you take these tips under consideration while fine-tuning your written proposal and submitting them for consideration.

A written proposal is only one part of appealing to an organization to invest in your vision. In addition to a written proposal, you may need to initiate a connection with the organization you wish to appeal to, present to a group, and have multiple meetings. Available at the AOMA Graduate School of Integrative Medicine website is a Quality Improvement Project prepared by Tamara Hall and Claudia Sandoval (Spring 2019). This project offers downloadable brochures to leave with medical doctors and a PowerPoint presentation discussing how TCM can complement an existing medical practice.

For more advanced assistance or training on understanding the intricacies of working and integrating with business, Cure Wellness of Austin, Texas offers consultation, training, and continuing education (CEU). You may reach Cure Wellness at: info@curewellness.com

Writing your Proposal

When writing a proposal, there are many considerations: Who is your audience? What is your goal? How long should the proposal be? How can it help you “make the sale?” The following sections will help you consider these questions, and guide you in the use of the documents of this Quality Improvement Project.

Just Getting Started

“The deepness of your mind produces the thickness of your thoughts.”

— Michael Bassey Johnson

Before you begin writing, consider what it is you want to achieve. Do you want to start providing community acupuncture in an inpatient facility? Provide private treatments in a hospital? Sell your herbs at a technology campus? Visualize it, feel it, and live it in your imagination. Dream one whole day of working in your ideal scenario. You won't have every little detail ironed out but have a strong enough vision that you are able to describe it. Uncertainty may translate as a lack of conviction. Be sure of what you *want*, then become sure that it is something the targeted organization *needs*.

When you are confident and excited about your vision, write down everything. Write it down anywhere: scrap paper, napkins. Don't worry about being organized or fancy, just get ideas out.

Over time you will have simmered on some great ideas and some horrible ideas, but you've had ideas and you've written them down – otherwise known as brainstorming. Weed through these notes and thoughts you've written, keep what you like, and take these ideas to the provided editable template. Remember, as you write never forget your goal and your audience. Your goal should direct *what* you want to talk about. Your audience will direct *how* you talk about it. The next section will discuss matters of audience and how to effectively communicate to them.

Business Now, Education Later

“You can make more friends in two months by becoming interested in other people than you can in two years by trying to get other people interested in you.”

- Author and Speaker, Dale Carnegie

The purpose of your proposal is to appeal to an organization in order to build something new within it. Likely the organization does not already have acupuncture services and people will have questions about how it works, what the experience is like, and what *Qi* is. These are excellent questions and we acupuncturists are typically very happy to address them.

The proposal is not the document to do that. Wait until you have been asked these questions before you try to answer them. Instead, use this document to illustrate the need to have acupuncture within the organization you are appealing *from their point of view* (i.e. improve patient outcomes, increase productivity and profits, create wellness, et cetera). Using space in your document to define words such as *Qi* or *Jing* will only increase the length of your document, reducing the likelihood it will be read, and probably put a sour taste in the reader's mouth. People want to be educated willingly. When they come to know you and trust you, they will ask you to be their teacher. Until then, focus on being a businessperson.

To keep your proposal focused and on track, meet the professionals you are appealing to by using their diction. If you are appealing directly to medical professionals, then use terms

such as *metabolic*, *neuron synapse*, and *vasovagal syncope*. Doctors already understand these words and using medical terms may also demonstrate your own medical knowledge and training. If you are appealing to non-medical administration, use layman's terms instead.

Educate only on the most immediate new information you require your audience to understand - such as how acupuncture (or whatever modality you intend to offer) may benefit their organization, how the clinic will be run, and what your model looks like (i.e. private room sessions versus community). The rest should be about them and their future successes with you. You will need to research the organization's mission and values, and consider how you may help the organization meet their goals.

Now that you have developed your vision (e.g. have an acupuncture practice), established your goal (e.g. have my practice inside a rehabilitation center), and considered your audience (e.g. the director of the rehabilitation center, who is a Medical Doctor), begin using the provided editable template.

The Sample Proposal

Included in this Quality Improvement Project is a sample proposal. It is a significantly shortened and de-identified document based on a successful proposal submitted and accepted in 2018 in Austin, Texas. It has been made available to hopefully strike inspiration in the writer or clarify questions about how to write sections. Take what is written with a grain-of-salt. It is only an example, not an actual proposal to be submitted. This is also only one author's writing style. Your voice will likely be very different.

If you like how any part of it was written you have the author's full permission to use it word-for-word, without quotations. If you *do* use any part of the sample or template, please retain Mary Froeba LAc as a contributor or reference the work with citations.

Using the Template

"You can always edit a bad page. You can't edit a blank page."

- Author, Jodi Picoult

The editable proposal template made available on the AOMA QIP webpage is mostly fill-in-the-blank ready. Just follow the prompts and you are on your way.

Throughout the text you will find markers of brackets with capitalized prompts, like this: [ORGANIZATION NAME]. These are flags for you to fill in your relevant information. In this example, you'd want to fill in the name of the Organization you are appealing to. Be sure to replace or omit all sections marked with these flags before submitting your proposal.

If any part of this template is used, include some notation of recognition to avoid plagiarism. You may cite the template within your resources section or include the author Mary Froeba LAc as your contributor.

Template Guide

In the following pages is a section-by-section guide to using the provided editable template. It is prepared according to APA formatting standards. Use what you like within the template and dispose of the rest.

Cover Page

Fill in the relevant data for your cover page: An appropriate title, a summary, the name of the organization you are appealing to, your name or organization you represent, and the name of those who contributed to the writing of your proposal.

About the Provided Optional Text: Update the summary to reflect your specific vision and proposal.

Header

Update the header to include the title of your proposal. The header is not included on the cover page.

Introduction

Your introduction should be somewhat broad. You are not jumping straight into any sort of argument, just setting the stage. Sometimes it helps to write the introduction last. You can come back to this section.

Background

If there is history or explanations of what you want to offer, here is where you begin. Begin narrowing in on the facts surrounding what you want to offer. Is there history relevant to the organization? Is there research you can now share?

About [YOU / YOUR ORGANIZATION]

This is where you may describe the organization you represent. If you do not represent an organization then describe yourself. Your reader will want to know who they may be doing business with. If you can, limit this section to one paragraph. Write in the third person.

About Acupuncture Licensure in the State of Texas

Most individuals have no idea what goes into becoming an acupuncturist, or that we are even governed by the medical boards of most states.

If you are writing a very short proposal, a sentence or two stating your qualifications would still be ideal, but not necessary. Make sure your complete title

is somewhere visible within your proposal. Make it clear you have (at least) a Master's degree!

About the Provided Optional Text: This information is taken directly from the Texas Medical Board website and is cited in the resources.

Vision and Proposal

What is this whole proposal about? What do you want to do? This is where you show you have a clear vision of what you want to accomplish. Paint a picture, so to speak. While you will need to be flexible, busy organizations do not want to invest time and money on half-baked ideas. Show you are prepared.

If you are writing a one-page proposal, this section will be the bulk of your proposal. It may not be as long and detailed as the one in the template, but it is still amongst the most important information you can provide.

Proposed Project Phases

Remember that the members of the organization you are appealing to are essentially your potential investors. If they approve your offer, they will be taking a financial risk by offering their resources. Investors want to feel comfortable and confident in their risk-taking. By offering a thoughtful plan, comfort and confidence may be fostered.

This template offers space to describe phases for your project. This begins with a Pilot Project Phase, in other words, baby steps. Setting up a pilot project creates comfort for the investing organization. They know they can start small and minimize financial risk. The subsequent phases allow for growth in baby steps as well.

For you, each phase offers an opportunity to prove yourself, your offerings, and the profession of acupuncture as a whole. Be prepared to conduct self-inquiries and collect data on patient experience, etc.

While it is encouraged to give a general plan to foster comfort and confidence in the investing organization, you do not need all the details worked out right away. Too much detail becomes daunting to read and you may lose your audience.

Risk Management

There may not be room for this section in a short proposal, but a longer one should have it. There will always be a member of an organization who prioritizes risk management. They are there specifically because they are highly concerned with safety, health, and minimizing dangers, whether or not it is in their job description. If you do not appeal to their concerns about risk management, they will be the first to deny your requests.

Financial Investment

Again, this section may not be appropriate for a shorter proposal. It is arguably the least important section to have in your proposal but the most important to be clear about when it comes time to discuss terms.

This section may wait until negotiations begin. Be prepared to ask for everything you need when that time comes. If your project is accepted, don't allow yourself to get stuck with a bill you weren't expecting. It is good to set clear expectations.

Records Management

This section is unimportant for most proposals. You should, though, consider how you want to handle your patient charts. Do you want to retain the medical records as a contractor or be included in the organization's paper or electronic health records (EHR) if they maintain such records?

Benefits to [ORGANIZATION]

This section is just as important as the section describing your vision and proposal. This is where you really sell your plan. Why should this organization invest in you and your vision? What might the organization gain from what you offer?

Financial costs and benefits are a major factor for most organizations. It can be difficult to come up with projections without financial experience but not impossible. You know how much acupuncture supplies cost and how much your services are worth. Start there. In the end, though, you are a medical professional and (probably) not a financial one. Emphasize your strengths.

Benefits to [YOUR ORGANIZATION]

This section is only useful if you represent an organization. Why does your organization want to get into business with theirs?

If you only represent yourself, omit this section.

If you are writing a short, one-page proposal, omit this section.

References

Avoid unbacked claims and plagiarism by including a complete reference section. Microsoft Word can auto generate a reference section. Go to the "References" tab and click "Manage Sources." Refresh the Reference section in the template to update your list.

Revising and Editing

Now that you have put words to paper, you can begin working through second and third drafts. Very likely your first draft will need some serious revisions. It is easy to lose sight of your goal and audience when you are trying to turn a piece of paper into a proposal. Remember your goal and who you are writing this proposal for as you move through your editing process.

The Length of Your Proposal

“When your story is ready for rewrite, cut it to the bone. Get rid of every ounce of excess fat. This is going to hurt...but it must be done.”

— Author, Stephen King

When determining the length of your proposal, consider your audience and purpose. You want to be able to get across your vision and demonstrate readiness but you must also hold the audience’s attention.

Recently, a company that helps people create proposals called Better Proposals ran a retrospective study that showed the most accepted proposals in 2017 were exactly six pages long (Proposals, 2018).

Your intended audience members are probably extremely busy and don’t have time to sort through large documents. A short proposal is ideal when you need to grab attention quickly. You can go over greater details in future meetings. A proposal of one to eight pages will suffice to share your ideas. This is the most common length of the proposal and most encouraged, especially if you have invited yourself to submit a proposal.

Longer proposals serve another purpose. These exist when you have been asked to submit a plan or you otherwise already have your foot solidly in the door. These longer proposals describe in much greater detail what you have to offer and what your vision is for the organization. Longer more detailed proposals help answer questions in advance and are especially helpful when the document is meant to be distributed among multiple departments.

Know that this is a great opportunity to show your professionalism as a program developer or director. Details will matter in such a proposal but length should still be limited. *A twenty-page document is thorough but daunting to the reader and likely to be ignored, even if that is what the reader requested.*

If you do choose to write a longer proposal, include a summary and a cover page. Do not exceed one page (one-side) for this summary.

Refinement

“You don’t start out writing good stuff. You start out writing crap and thinking it’s good stuff, and then gradually you get better at it.

That’s why I say one of the most valuable traits is persistence.”

— Author, Octavia E. Butler

After a first draft has been written, re-written, read aloud and once again edited and revised, find someone else to read your document. Ideally, someone not too different from your target audience. If you are appealing to non-acupuncturists, find a non-acupuncturist to read your document.

Ask this person to read your document and then explain it back to you. Do not become defensive or try to explain your paper. If you do not like what they have said, revise the document itself until they’ve come to the correct understanding you want them to have.

Once you have edited and re-written your document to satisfaction, confirm you have correctly cited all of your resources and the formatting is clean and attractive, hitting your target number of pages. Avoid having less than a paragraph spill over onto the final page. You want more ink than blank space in all pages.

If you have questions about APA formatting, as used in this document and the template, see the book [APA: The Easy Way! Second Edition](#) by Peggy M. and Timothy J. Houghton.

Make sure you have removed all markers and flags such as “[ORGANIZATION]”.

And there you have it! A proposal ready for submission! Congratulations and good luck.

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