Purpose:

The purpose of this Standard Operating Procedure is to standardize our proposal letters.

Procedure:

1) Locate the Word document called "Template – Proposal Letter." Each project has its own folder on the P drive. This document is in the "Template" folder within the "Preliminary" folder of each job folder.

2) Open the "Template – Proposal Letter" file and save it as a new file.
   A) The file name should include the proposal description and include the date. Below are two examples:
      i) Proposal – Job Name – DD Budget 23.5.15 (used with preliminary budgets)
      ii) Proposal – Job Name 23.5.15 (used with final proposals)
   B) The file should be saved in the appropriate location. Below are two examples:
      i) The DD budget described above should be saved in the "03 DD Budget" folder in the following example path: P:\all projects\10 – Preliminary & Estimating\Job Number & Name\Preliminary\02 Proposals\03 DD Budget
      ii) The final proposal above should be saved in the "04 Final Proposal" folder.

3) Modify the template proposal letter as necessary.
   A) Provide the date, recipient information, project information, and "Dear _____."
   B) The template is based on a final proposal. If providing a budget, change "quote the sum" to "provide a preliminary budget."
   C) Provide the amount in both written and numeric formats.
   D) If all the documents are part of the same issuance set it is appropriate to provide that named set in lieu of a drawing list (ex. Schematic Design).
   E) Provide the site and building breakdowns.
      i) If this is a building only proposal, remove the table.
      ii) If additional breakdowns are necessary (ex. Site, Building, & TI), add additional rows to the table.
   F) Provide your name and title with the signature.
   G) Include any Cc, and attachments as necessary.

4) Save the Word document and a PDF version.
5) Include signature and all attachments (ex. clarifications, breakdown, etc.) with the PDF version, saving it as a single document.