

Proposal Writing



Sample

Corporate Training Materials

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Preface

What is Courseware?



Welcome to Corporate Training Materials, a completely new training experience!

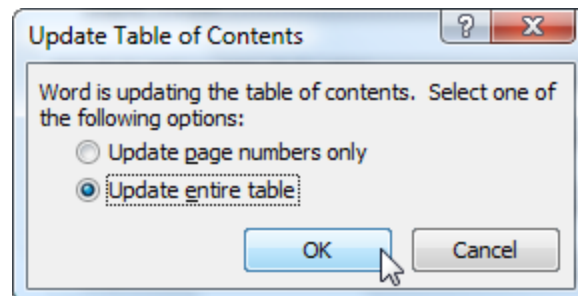
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide your materials, materials for the student, PowerPoint slides, and a take-home reference sheet for the student. You simply need to prepare and train!

Best of all, our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint. (Most other word processing and presentation programs support these formats, too.) This means that you can customize the content, add your logo, change the color scheme, and easily print and e-mail training materials.

How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants' industry, or additional information. You can, of course, also use all of your word processor's other features, including text formatting and editing tools (such as cutting and pasting).

To remove modules, simply select the text and press Delete on your keyboard. Then, navigate to the Table of Contents, right-click, and click Update Field. You may see a dialog box; if so, click "Update entire table" and press OK.

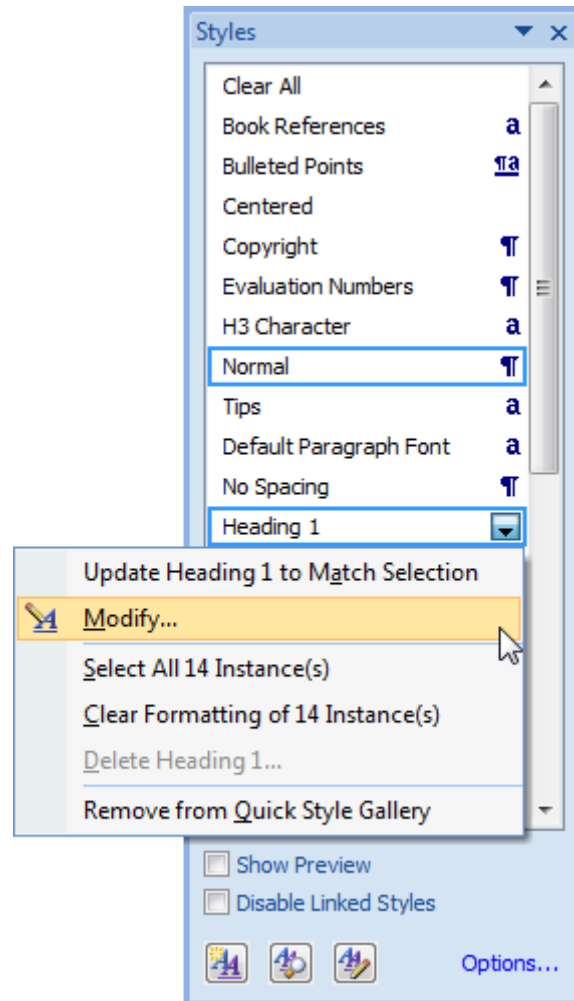


(You will also want to perform this step if you add modules or move them around.)

If you want to change the way text looks, you can format any piece of text any way you want. However, to make it easy, we have used styles so that you can update all the text at once.

If you are using Word 97 to 2003, start by clicking the Format menu followed by Styles and Formatting. In Word 2007 and 2010 under the Home tab, right-click on your chosen style and click Modify. That will then produce the Modify Style options window where you can set your preferred style options.

For example, if we wanted to change our Heading 1 style, used for Module Titles, this is what we would do:



Now, we can change our formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to [Word 2007 or 2010 Essentials](#) by Corporate Training Materials.

Materials Required

All of our courses use flip chart paper and markers extensively. (If you prefer, you can use a whiteboard or chalkboard instead.)

We recommend that each participant have a copy of the Training Manual, and that you review each module before training to ensure you have any special materials required. Worksheets and handouts are included within a separate activities folder and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

- Laptop with projector, for PowerPoint slides
- Quick Reference Sheets for students to take home
- Timer or watch (separate from your laptop)
- Masking tape
- Blank paper

Maximizing Your Training Power

We have just one more thing for you before you get started. Our company is built for trainers, by trainers, so we thought we would share some of our tips with you, to help you create an engaging, unforgettable experience for your participants.

- **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
 - Use examples, case studies, and stories that are relevant to the group.
 - Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
 - Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn by talking about it, while still others need a hands-on approach. For more information, we suggest Experiential Learning by David Kolb.)
- **Make it fun and interactive.** Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of the tips in this book and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
- **Make it relevant.** Participants are much more receptive to learning if they understand why they are learning it and how they can apply it in their daily lives. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to real life.
- **Keep an open mind.** Many trainers find that they learn something each time they teach a workshop. If you go into a training session with that attitude, you will find that there can be an amazing two-way flow of information between the trainer and trainees. Enjoy it, learn from it, and make the most of it in your workshops.

And now, time for the training!

Icebreakers

Each course is provided with a wide range of interactive Icebreakers. The trainer can utilize an Icebreaker to help facilitate the beginning of the course, as it helps “break the ice” with the participants. If the participants are new to each other, an icebreaker is a great way to introduce everyone to each other. If the participants all know each other it can still help loosen up the room and begin the training session on positive note. Below you will see one of the icebreakers that can be utilized from the Icebreakers folder.

Icebreaker: Friends Indeed

Purpose

Have the participants moving around and help to make introductions to each other.

Materials Required

- Name card for each person
- Markers

Preparation

Have participants fill out their name card. Then, ask participants to stand in a circle, shoulder to shoulder. They should place their name card at their feet. Then they can take a step back. You as the facilitator should take the place in the center of the circle.

Activity

Explain that there is one less place than people in the group, as you are in the middle and will be participating. You will call out a statement that applies to you, and anyone to whom that statement applies must find another place in the circle.

Examples:

- Friends who have cats at home
- Friends who are wearing blue
- Friends who don't like ice cream

The odd person out must stand in the center and make a statement.

The rules:

- You cannot move immediately to your left or right, or back to your place.
- Let's be adults: no kicking, punching, body-checking, etc.

Play a few rounds until everyone has had a chance to move around.

Training Manual Sample

On the following pages is a sample module from our Training Manual. Each of our courses contains twelve modules with three to five lessons per module. It is in the same format and contains the same material as the Instructor Guide, which is then shown after the Training Manual sample, but does not contain the Lesson Plans box which assists the trainer during facilitation.

The Training Manual can be easily updated, edited, or customized to add your business name and company logo or that of your clients. It provides each participant with a copy of the material where they can follow along with the instructor.

*I try to leave out the parts that
people skip.*

Elmore Leonard

Sample Module: Preparing an Outline



Now that we have our background information, it's time to start creating the framework for the proposal. The preparation process that we outline in this module may seem detailed and comprehensive – and it is. Why? The more detailed and accurate your outline is the more cohesive and persuasive your proposal will be.

With that being said, the outline should not be set in stone. It must evolve as the proposal is being built.

A General Format

Proposals vary widely in their size and structure. However, most proposals include the following elements, listed in the order that they typically appear in the proposal:



- **Cover Letter:** Like a resume cover letter, this document outlines what your company is, the basic thrust of the proposal, and any conditions (such as a date of expiry). It should be signed by your senior officers.
- **Title Page:** Every proposal should have a title. The title page should include the title, the client's name, and address, the name of the person receiving the proposal, your company's name, and address, and the date the proposal will be submitted. If you are responding to a request for proposal, the first line of the title page should say, "Response to Requirements," and the proposal number should be listed below the title.
- **Proprietary Notice:** It is always a good idea to outline how the information in the proposal can and cannot be used, shared, and transmitted. Get your legal team's help with this section.
- **Table of Contents:** A list of all the major sections and sub-sections in your proposal. You can use Arabic or Roman numerals; just be consistent. (Tip: Most word processors can generate this for you automatically.)
- **Executive Summary:** This is the most important selling tool in your proposal. It should be aimed at the executives in the client's organization (hence its name). It should outline the proposed solution, why the solution was chosen, project management details, how the product will be handed off to the organization (if appropriate), major benefits that will be realized, high-level cost and time estimates, and why your organization is the best candidate for the task.
- **Introduction:** An explanation of why you are writing the proposal, and an overview of what to expect.
- **Body:** The meat of the proposal, organized by headings (your major points) and sub-headings (sub-points).
- **Summary and Conclusions:** Summarize the main points covered, the proposed solution, and why your organization is the best candidate for the task.
- **Bibliography:** List of resources used in the proposal.

Note: The level of headings that you use will depend on the complexity of the report. Our suggestion: use a minimum of two and a maximum of five.

Special Sections

In addition to the standard components mentioned in the previous topic, here are some optional components that you might see in a proposal:



- Table of Figures (if there are a lot of illustrations in the proposal)
- Statement of understanding
- Organizational history
- Summary of writer's credentials
- Proposed project timeline
- Cost-benefit analysis
- Benefits summary
- Scientific method
- Budget
- Specific project elements, such as proposed product design, marketing plan, schedule, etc.
- Problem analysis
- Glossary of jargon, technical terms, etc.

Can you think of other things to add to this list?

Creating a Framework

Once the standard components and any special sections are outlined, it is time to build the body of your proposal. To start, outline the major points that your proposal will contain.



Example

1. Cover letter
2. Title page
3. Proprietary Notice
4. Table of Contents
5. Executive Summary
6. Introduction
7. History of Helicopters in North America
8. Local History of Helicopters
9. Helicopters Today
10. An Overview of the Jetking H176
11. Summary and conclusions
12. Bibliography

Remember, this is just a guideline – you can move sections around and add additional points as you perform your research and write the proposal.

Getting Down to Details



Once you have your main points outlined, add the supporting or sub-points beneath each heading. As we mentioned earlier, we recommend at least two sub-points (and a maximum of nine) per heading. If you can't find two sub-points, you may want to combine that major heading with another one.

In this example, we have added a few additional sub-points to points 8 and 9.

Example

1. Cover Letter
2. Title Page
3. Proprietary Notice
4. Table of Contents
5. Executive Summary
6. Introduction
7. History of Helicopters
8. Helicopters Today
 - 8.1. Search and Rescue Functions
 - 8.2. Military Operations
 - 8.3. Training Functions
9. An Overview of the Jetking H176
 - 9.1. Search and Rescue Functions
 - 9.2. Military Operations
 - 9.3. Training Functions
10. Summary and Conclusions
11. Bibliography

Instructor Guide Sample

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box. Each Instructor Guide and Training Manual mirrors each other in terms of the content. They differ in that the Instructor Guide is customized towards the trainer, and Training Manual is customized for the participant.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor train that particular lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.

*I try to leave out the parts that
people skip.*

Elmore Leonard

Sample Module: Preparing an Outline



Now that we have our background information, it's time to start creating the framework for the proposal. The preparation process that we outline in this module may seem detailed and comprehensive – and it is. Why? The more detailed and accurate your outline is the more cohesive and persuasive your proposal will be.

With that being said, the outline should not be set in stone. It must evolve as the proposal is being built.

A General Format

Estimated Time	10 minutes
Topic Objective	To understand the basic format that a proposal should take.
Topic Summary	<p>Most proposals include the following elements:</p> <ul style="list-style-type: none">• Cover Letter• Title Page• Proprietary Notice• Table of Contents• Executive Summary• Introduction• Body of the report, organized into headings (your major points) and sub-headings (sub-points)• Summary and Conclusions• Bibliography
Materials Required	<ul style="list-style-type: none">• Flip chart paper• Markers
Planning Checklist	Gather some examples of different proposals.
Recommended Activity	Discuss which standard components are included as part of participants' proposals. Encourage participants to share other mandatory parts.
Stories to Share	If possible, tie the discussion back to the types of proposals covered in Module Two.
Delivery Tips	Make sure participants respect their organization's confidentiality during this discussion.
Review Questions	Name one part of a standard proposal.

Proposals vary widely in their size and structure. However, most proposals include the following elements, listed in the order that they typically appear in the proposal:



- **Cover Letter:** Like a resume cover letter, this document outlines what your company is, the basic thrust of the proposal, and any conditions (such as a date of expiry). It should be signed by your senior officers.
- **Title Page:** Every proposal should have a title. The title page should include the title, the client's name, and address, the name of the person receiving the proposal, your company's name, and address, and the date the proposal will be submitted. If you are responding to a request for proposal, the first line of the title page should say, "Response to Requirements," and the proposal number should be listed below the title.
- **Proprietary Notice:** It is always a good idea to outline how the information in the proposal can and cannot be used, shared, and transmitted. Get your legal team's help with this section.
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- **Executive Summary:** This is the most important selling tool in your proposal. It should be aimed at the executives in the client's organization (hence its name). It should outline the proposed solution, why the solution was chosen, project management details, how the product will be handed off to the organization (if appropriate), major benefits that will be realized, high-level cost and time estimates, and why your organization is the best candidate for the task.
- **Introduction:** An explanation of why you are writing the proposal, and an overview of what to expect.
- **Body:** The meat of the proposal, organized by headings (your major points) and sub-headings (sub-points).
- **Summary and Conclusions:** Summarize the main points covered, the proposed solution, and why your organization is the best candidate for the task.
- **Bibliography:** List of resources used in the proposal.

Note: The level of headings that you use will depend on the complexity of the report. Our suggestion: use a minimum of two and a maximum of five.

Special Sections

Estimated Time	5 minutes
Topic Objective	To understand what components are optional in a proposal.
Topic Summary	Optional elements will depend on your organization, the proposal type, and the information that you are presenting.
Materials Required	<ul style="list-style-type: none">• Flip chart paper• Markers
Planning Checklist	Gather some examples of different proposals.
Recommended Activity	Discuss what special sections participants have included in their proposals.
Stories to Share	Tie the discussion back to the types of proposals covered in Module Two. For example, a technical approach overview would be necessary for a technical proposal, but perhaps not necessary for other types.
Delivery Tips	This activity can also be performed in small groups.
Review Questions	List one optional component of a proposal.

In addition to the standard components mentioned in the previous topic, here are some optional components that you might see in a proposal:



- Table of Figures (if there are a lot of illustrations in the proposal)
- Statement of understanding
- Organizational history
- Summary of writer's credentials
- Proposed project timeline
- Cost-benefit analysis
- Benefits summary
- Scientific method
- Budget
- Specific project elements, such as proposed product design, marketing plan, schedule, etc.
- Problem analysis
- Glossary of jargon, technical terms, etc.

Can you think of other things to add to this list?

Creating a Framework

Estimated Time	10 minutes
Topic Objective	To understand how to build the general framework of an outline.
Topic Summary	Once the standard components and any special sections are outlined, it is time to build the body of your proposal. To start, outline the major points that your proposal will contain.
Materials Required	<ul style="list-style-type: none">• Prepared sheet of flip chart paper (see Planning Checklist)• Blank flip chart paper• Markers• Tape
Planning Checklist	<p>Prepare a sheet of flip chart paper with the following topics, or choose your own based on participants' industries:</p> <ul style="list-style-type: none">• New health records management system• Succession planning consulting• On-site catering• Off-site data backup services
Recommended Activity	Divide participants into groups of six to eight. Ask each group to choose a topic and write a brief outline for a proposal. Encourage participants to be creative. Recommend that they leave lots of white space between each heading for the next exercise.
Delivery Tips	<p>You could also write each topic on a different sheet of flip chart paper, post the sheets on the wall, and have participants choose which proposal they want to work on.</p> <p>Ask participants to stay in their group for the next topic.</p>
Review Questions	Based on the outline provided on the next page, what might our example proposal be recommending?

Once the standard components and any special sections are outlined, it is time to build the body of your proposal. To start, outline the major points that your proposal will contain.



Example

1. Cover letter
2. Title page
3. Proprietary Notice
4. Table of Contents
5. Executive Summary
6. Introduction
7. History of Helicopters in North America
8. Local History of Helicopters
9. Helicopters Today
10. An Overview of the Jetking H176
11. Summary and conclusions
12. Bibliography

Remember, this is just a guideline – you can move sections around and add additional points as you perform your research and write the proposal.

Getting Down to Details

Estimated Time	5 minutes
Topic Objective	To understand how to build a more specific outline.
Topic Summary	Once you have your main points outlined, add the supporting or sub-points beneath each heading.
Materials Required	<ul style="list-style-type: none">• Outlines on flip chart paper from the previous topic• Markers• Tape
Recommended Activity	Ask each group to add some sub-points to beef up their outline from the previous topic.
Stories to Share	You will often need to do some preliminary research to build a complete outline. Remember, the outline should grow with your proposal – it's a skeleton, not the whole body.
Delivery Tips	To debrief, discuss what changes were necessary, what research would have helped with the process, and what lessons participants learned.



Once you have your main points outlined, add the supporting or sub-points beneath each heading. As we mentioned earlier, we recommend at least two sub-points (and a maximum of nine) per heading. If you can't find two sub-points, you may want to combine that major heading with another one.

In this example, we have added a few additional sub-points to points 8 and 9.

Example

1. Cover Letter
2. Title Page
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 - 8.3. Training Functions
9. An Overview of the Jetking H176
 - 9.1. Search and Rescue Functions
 - 9.2. Military Operations
 - 9.3. Training Functions
10. Summary and Conclusions
11. Bibliography

Quick Reference Sheets

Below is an example of our Quick reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

Proposal Writing

Identifying Your Purpose and Your Audience

Your proposal should have a single goal in mind. What exactly will the proposal do? Some examples:



- Convince a customer to buy the WidgetMaster 3000
- Convince a customer to hire you to demolish a building
- Outline the meal planning services that your company provides

Writing the Goal Statement

Once the needs analysis is complete, it's time to write the goal statement. This will help you understand what you want to achieve.



First, identify the type of proposal.

Throughout this course, we will be focusing on a generic proposal. However, having a more defined type in mind will help you create a more successful proposal. You may choose a type discussed in the previous module (technical, sales, cost, or professional service), or it may be of a different type altogether (such as a non-profit grant proposal).

Next, add in the purpose of your proposal. Finally, bring it all together into the goal statement. This statement typically takes the form: Our <type of proposal> will convince the reader to <desired end result>.

Using Illustrations

A picture is worth a thousand words... if it is done correctly. Let's look at some tips.

Some overall tips for diagrams:

- Only use an illustration if it helps to convey your point.
- Make sure to use the proper type of illustration, particularly if you are using a chart.
- Each illustration should convey one major point.
- Where possible, construct diagrams using a computer.



If your proposal includes many illustrations, number each sequentially and include a Table of Figures at the beginning of your proposal. (Many word processors can do this for you automatically.)

Certificate of Completion

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.

CERTIFICATE OF COMPLETION

[Name]

Has mastered the course

Proposal Writing

Awarded this _____ day of _____, 20____

Presenter Name and Title

PowerPoint Sample

Below you will find the PowerPoint sample. The slides are based on and created from the Training Manual. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.

Sample Module: Preparing An Outline

The preparation process that we outline in this module may seem detailed and comprehensive – and it is. *Why?* The more detailed and accurate your outline is, the more cohesive and persuasive your proposal will be.

I try to leave out the parts that people skip.

Elmore Leonard

ANALYSIS
SOLUTION
PROCESS
OBJECTIVES
TEAMWORK
VISION
SALES



A General Format

Cover letter and title page

Table of contents

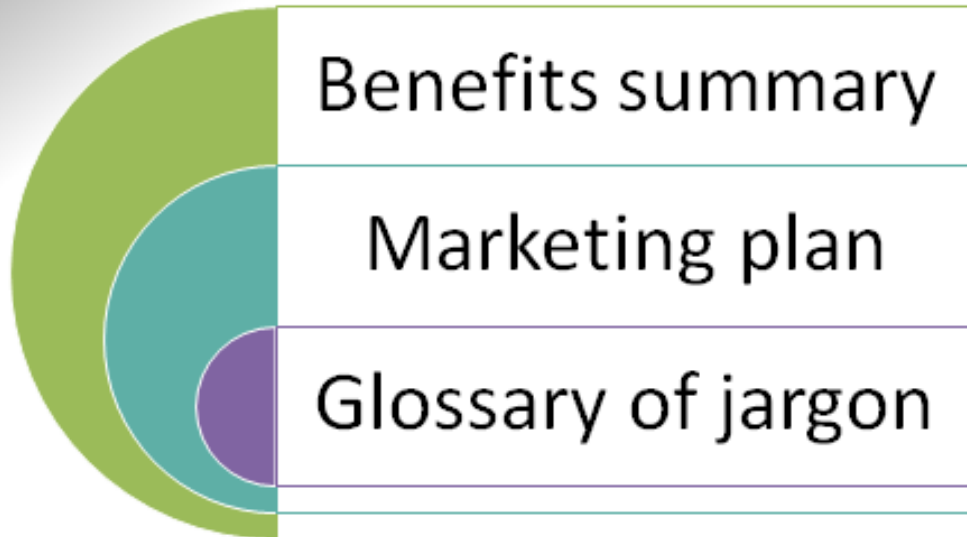
Executive
summary

Introduction

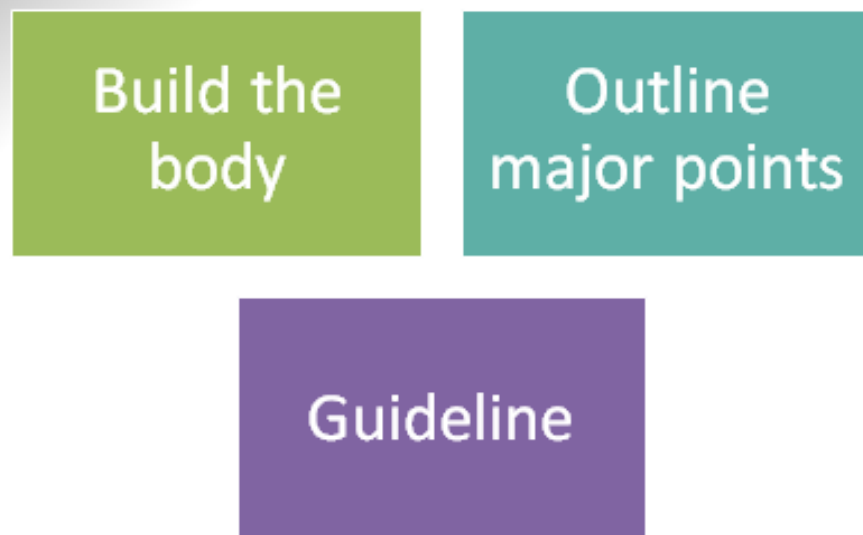
Body

Conclusions

Special Sections



Creating a Framework



Getting Down to Details

Supporting points

Sub-categories

At least two sub-points per heading

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