

Writing: Consulting Proposals

The purpose of a proposal is to set the expectations for the project for both you and your client. Here's a list of what it could include, with thanks to Chris Holloman at Ohio State.

- Project Background – ensure that you understand the project to a degree acceptable to the client.
- Project Goals and Objectives – Explain exactly what questions will be answered at the end of the project.
- Project Design – Explain the sampling strategy, experimental design used, and any limitations that will impact statistical analyses and conclusions.
- Measurement System Design and Evaluation — Describe any instruments that will be used to collect data and how they will be assessed. For example, with a survey this includes focus groups, pilot testing, and survey administration.
- Data Acquisition / Database Design – Describe what the data will look like, who will be responsible for collecting and organizing data, and how it will be delivered.
- Proposed Analysis Methodology – Outline the statistical procedures that will be used.
- Reports and Presentations – Describe the deliverables for the project. May include formal/informal reports, statistical output, and presentations.
- Project Management – Detail exactly who will be working on the project and what each person will be responsible for.
- Tasks and Timelines – Projects are usually broken down into a series of tasks, each of which has a target completion date.

Example Project:

- Task 1: Meetings with clients to review project goals.
 - Task 2: Exploratory data analysis to determine appropriate models
 - Task 3: Fit formal statistical models to data
 - Task 4: Report writing
 - Task 5: Delivery of report to client and formal presentation of results.
- Cost Estimates — Each task in the “Tasks and Timelines” section should have a cost associated with it. Usually consulting statisticians work on a dollar-per-hour basis, so only hours need to be estimated.
 - Biosketch/Resume – Typically, a short resume (sometimes called a biosketch) is included at the end of the proposal for each person listed in the “Project Management” section. This explains why you are qualified to perform the work required. Clients may later search for a collaborator based on what you provide to them.

How much should you charge?

The ASA Section on Statistical Consulting periodically conducts a survey of statistical consultants to answer this question.

The results of the a 2005 survey of the ASA consulting section can be found here:
http://www.amstat.org/sections/cnsl/newsletter/pdf_archive/vol23no1.pdf

Ultimately, the amount you charge depends on your expenses (advertising, overhead, cost of production of deliverables, travel expenses, etc.)

What should you charge for? Generally, the following are expected charges:

- Data analysis
- Data organization, importation
- Research of methods
- Travel time
- Materials (paper, electronic media)

You should not directly bill for the following:

- Proposal preparation
- Initial meeting
- Billing

Name: _____

Which step of the proposal were you surprised to see? (Or just pick one you think is particularly valuable, or not.) What makes this step valuable, or not?
