

Webinar 12 Handout: **FREELANCE TEMPLATES**

Let's say you finish your Nutritious Life certification (yay for you!) and you decide to approach a local gym about setting up a nutrition consultation program. Or you are talking with an online supplement company about starting a health blog for their site. Or you contact a neighborhood cafe about creating a gluten-free section for their menu. Or you reach out to a small food company about developing recipes for their website. All these people you reach out to say, "Sounds great! Send us a proposal." Umm...what?

In your nutrition and wellness practice you are likely to have opportunities for freelance jobs, and these jobs often require you to submit a proposal. Project proposals might sound intimidating, but you can rock this. Promise. A proposal is basically a formal way of telling the employer/contractor who you are, what you'll be doing, how you'll be doing it, how long it will take you, how much you'll charge, and how you want to be paid. Depending on the project, there may be other considerations too: How can they use the assets you provide? How long will the relationship last? Will you have any expenses that need to be compensated? Is there an exclusivity or non-compete that needs to be considered? Even if you discuss details via phone or email, many employers will want an official proposal to keep on file or will need it to get approval from their accounting departments or supervisors. Having an official proposal will also benefit you in case there are any discrepancies--if everything is outlined and approved, there are no grey areas about what is expected.

The proposal is the roadmap for the project or job. Most proposals for freelance writing or work should be about one page but this can vary depending upon the specific company or job. Writing should be professional, even if your typical writing style is more laid back, and language should be clear and concise--there's no need for fluff here!

When you sit down to write the proposal, start with the template below, but feel free to add or delete sections as you see fit. Before you finalize the document, mentally walk yourself through everything it will take to complete the project and get paid and make sure you haven't missed any important details. Always convert your document into a PDF before sending. (In some situations, it might be appropriate to address these items in email/letter form rather than a formal outline. If you don't receive exact instructions, use your best judgment depending upon the company.)

In the proposal, you'll set the terms for payment. Some jobs might merit half up front and half when the job is done; for longer-term projects you might want to bill monthly or as certain sections are completed. For more permanent gigs, you'll want to establish a steady schedule for payments.

On the next page you'll find a proposal template. Below the proposal template is an invoice template. Again, this can be modified depending upon the job. (On this style invoice, everything is itemized by date. Many employers like to see exactly what is done when so they know how they are spending their money.) If you have expenses, be sure to keep and submit receipts! In your proposal you will establish when the invoice(s) will be sent (at the end of the entire project, every two weeks, after certain portions of the projects are completed, etc.)

Some jobs might warrant a contract. Often, this will come from the company/employer, but you might be required to draw up your own. In many cases, a reiteration of the approved proposal can act as the contract. We advise working with a legal party if you have any hesitations to ensure your bases are covered, especially if major assets are being delivered and you will be seeing clients on the company's behalf. In some cases, adding official signatures to the proposal can act as a contract (as opposed to gaining approval over email or phone).

Proposal Template

- I. Project Overview and Scope: Start the proposal by outlining the purpose of the job and exactly what needs to be done. Yes, the employer probably already knows this, but it's good to reiterate the job in your own words so they know you "get it". Having this section might help down the road if there is a discrepancy between what was expected and what was delivered.
- II. Credentials: Sell why you are the perfect candidate for the job. They've likely seen your resume so don't go crazy here, but take a moment to connect your skills and experience to the job at hand. This section is especially important if there are multiple people being considered for the job.
- III. Deliverables: Outline exactly what you'll deliver. Again, the employer might already have an expectation, so this section shows you "get it". Sometimes with freelance work, the employer isn't exactly sure and this is where you tell them. For example, a food company might be looking for a nutritionist who can develop recipes and blog content for their website. This is where you outline what they'll get **exactly**: X many blog and recipes, delivered in Y format, on Z schedule, etc. If you are creating assets (like recipes and blogs) outline how they may be used. Does the company have full ownership or will you need to be credited? Think through what you'll be providing and write it all down here. Not every single detail needs to be considered in a proposal, but if a signed proposal acts as the contract, you'll want to include as many details as possible.
- IV. Timeframe: Provide an estimation of how long the job will take. Be realistic and overestimate a little--better to hand the work in early than late! Over versus underdelivering is always a good thing. If the position is a longer-term gig, outline when it starts and when it ends (or if it will be on-going).
- V. Costs: Pricing guidelines can vary. For writing, you might charge per piece (charging per word is pretty old school at this point but some companies still prefer it) or even per hour if extensive research is required. Unless you were given parameters, propose what you would prefer. If there will be additional costs that you would want reimbursed (mileage, recipe ingredients, etc.) outline that here too.
- VI. Payment: This goes hand in hand with costs. Outline how you want to be paid (check, direct deposit, etc.) and when you want to be paid (at the beginning or end of project, periodically, etc.) Get this down now so there's no confusion when payday comes.

Invoice Template

Name
Address
Email
Phone

INVOICE

Date

BILL TO

Name and address

INSTRUCTIONS

How will you be paid (check, deposit, etc.)

SERVICES

Date	Description	Quantity	Unit Price	Total
Date of work	What did you do? What are they paying for?	Example 6 hours, 500 words, etc.	How are you billing? (example \$30 per hour)	= quantity x unit price

Services subtotal \$_____

EXPENSES

Date	Description	Total
Date of expense	What and where you spent \$\$	Amount spent

Expenses subtotal \$_____

TOTAL DUE \$_____

Date Due _____