



Executive Summary

Date: _____

Program / Idea Name: _____

Submitted by (Name & Department): _____

Proposal Type (check one):

New Program/Service Program/Service Adaptation Cost-Saving

1. Executive Overview (Purpose & Recommendation)

Briefly describe what is being proposed and the decision being requested. This section should be concise and written for senior leadership.

2. Need or Opportunity

Describe the problem, gap, or opportunity this proposal addresses. Include relevant members, community, or organizational context.

3. Proposed Solution

Explain the program, service, or cost-saving approach. Describe how it works and why it is effective.

4. Target Audience & Impact

Identify who will benefit and how. Include expected participation, reach, or organizational impact. Think of this as to how you will market your program.

5. Competitive or Alternative Options

Describe existing alternatives (internal or external) and explain why this proposal is preferable.

6. Operations & Readiness

Summarize where and how the program will operate, including staffing, facilities, and timing considerations.

7. Financial Snapshot (from Excel Model)

Start-Up Costs: \$ _____

Annual Revenue / Savings: \$ _____

Annual Operating Costs: \$ _____

Net Annual Impact: \$ _____

ROI: _____

Break-Even / Payback: _____ months

8. Risks & Mitigation

Identify key financial, operational, or adoption risks and how they will be mitigated.

9. Implementation Timeline

Outline major milestones from approval through launch and evaluation.