

Initial Proposal & Contract Templates

Having a professional contract for your services is important to ensure that you have an understanding between you and your client about your fees and payment terms, your project deliverables, cancellation clauses, and any other expectations or conditions you want to communicate. Having clear communication up front about ownership of the work you are producing, the training or presentation you are agreeing to, or consulting services you are providing helps to avoid misunderstandings and confusion.

The following is a very basic outline of a sample contract. However, you should have an attorney review your contracts if you need legal advice. This is just meant to be a guide and you can customize it any way that you need to. *Note – it is common to provide a proposal that lays out what you are agreeing to do along with your pricing structure or options prior to sending a contract for signature. Please see the example below and adapt to your situation.

You can create an easy professional letterhead in Canva or Word for your proposals and contracts.

PROPOSAL TEMPLATE

Prepared For: *[add client name]*

Date Prepared:

By: *[add your name]*

Goal: *[add 1-2 sentences about the overall project or your proposed services. Example: To provide consulting services for XYZ project to increase training and trauma-informed practices for staff in a housing program.]*

Proposed Scope of Work: *[add bulleted details about what you are agreeing to do]*

Example:

- *Participate in a Zoom planning meeting/call to address questions and create a training outline based on client's needs.*
- *Review of relevant existing program policies and procedures and manuals.*
- *Draft custom training plan for staff based on unique needs.*
- *Deliver trainings [add dates, times, etc.]*

Fee Options and Payment Details:

Hourly Consulting Rate and Proposed Number of Hours: *[add if you are planning to do this on an hourly rate]*

Flat Rate Cost: \$ _____ *[add this if you prefer to do a flat for the entire project. Sometimes this can be more profitable if you know about how long it will take you to complete the deliverables]*

Additional hours available at your request at a rate of: \$ _____



Timeline: Flexible to fit your desired timeframe but I would be available to begin _____ [add when] and anticipate _____ [add how long] to complete the project (depending on your availability).

Payment Terms: [you can determine what you want as a deposit for your services—this is just an example]

Example: Signed contract and 50% deposit to begin and remaining balance due within 7 days of project completion. Check payment is preferred, and invoices will be submitted for payment.

Next Steps: [you can edit this as you want to but this is a starting point]

Example: Please note that this proposal was drafted based on our previous conversation but can be modified to fit your unique needs and budget. Feel free to contact me with any questions or edit suggestions. If you would like to proceed with securing my services, I will draw up a contract for your review as a next step.

This pricing estimate is guaranteed for 30 days. Thank you so much for your consideration!



Consulting Contract Template

Independent Contractor Agreement between [add client name] and Consultant, [add your name].

This Independent Contractor Agreement (this “Agreement”) is made as of _____, (date) by and between [add client name and address] with offices located _____ and [add your name and mailing address] (“Contractor”), with offices _____.

SCOPE OF PROJECT

[this should match the proposal terms if you did that step in the booking process]

GOAL

[add 1-2 sentences about the overall project or your proposed services.]

Example: To provide consulting services for XYZ project to increase training and trauma-informed practices for staff in a housing program.

PROPOSED SCOPE OF WORK

[add bulleted details about what you are agreeing to do]

Example:

- Participate in a Zoom planning meeting/call to address questions and create a training outline based on client’s needs.
- Review of relevant existing program policies and procedures and manuals.
- Draft custom training plan for staff based on unique needs.
- Deliver trainings [add dates, times, etc.]

Timeline to be completed by _____ [add date].

REPORTING RELATIONSHIP

Contractor will report directly to _____ [add who your contact is].

RELATIONSHIP OF PARTIES

_____ [client name] and _____ [your name] intend that the signing of this agreement will create an independent contractor relationship between the parties. _____ [your name] is not considered an agent or employee of _____ [client name] for any purpose. As an independent contractor, _____ [name] shall not be eligible for unemployment benefits or worker’s compensation insurance and shall not participate in any benefit program such as health insurance, life insurance, pension, profit sharing plans, paid vacation or paid sick leave. _____ [your name] also reserves the right to provide services for other non-profits and agencies at her own discretion.



COMPENSATION AND CONTRACT DURATION

_____ [client name] shall pay to Contractor a fee of \$_____ [add amount you agreed to] for the services described in this contract. Hours and services requested above and beyond the scope of this project may be requested for an additional fee (approved in advance by client).

PAYMENT TERMS & CONTRACT DURATION

[this is an example only and you can decide what your terms are]

_____ [your name] requests a down payment of _____% of the total flat fee with a signed contract to begin services. An agreed upon workplan will be developed upon receipt of deposit and signed contract. The remaining balance is due within 7 days after project completion.

PAYMENT PROCESS

Invoices are provided at the start and end of the project and due within 7 days of billing date.

EXPENSES

Any additional expenses will be pre-approved by client and contractor in the case of additional items requested that are not covered in this proposal.

INDEMNIFICATION

Both parties agree to indemnify and hold harmless the other from all claims, losses, expenses, fees including attorney fees, costs, and judgments that may be asserted against the other that result from the grossly negligent acts or omissions of the party, its employees, and agents.

TERMINATION

If either party is not satisfied with the above agreement or services provided, the contractual agreement can be terminated at any time with written notice by either party. Either party also has the right to request a renegotiation of this relationship. Any changes to this agreement shall be in writing and signed by both parties.

Client name and signature:

Date:

Contractor name and signature:

Date:

