

# 03

 Module

# WRITING A PROPOSAL NARRATIVE

## About This Module

Writing a proposal narrative requires careful planning, effective communication and strategic thinking. Before you begin writing, you will need to set up a plan for crafting the proposal using the following steps:

- 01. Determine who will be involved in the writing process.**
- 02. Establish a timeline, allowing time for writing, review and revisions.**
- 03. Develop a narrative that highlights the unique strengths of your proposal and organization.**
- 04. Create a detailed outline that provides a clear structure for the writing process.**
- 05. Hold a proposal kickoff meeting.**

This module will guide you through each of these steps; the remaining modules will provide guidance on further developing each component of the research project and the corresponding section of the proposal narrative.



## Step 1: Assemble A Proposal Team

As you think about assembling a team to respond to a Request for Proposal (RFP), consider the project's requirements and determine the staff in your organization that possess the required expertise to write each section. The proposal team usually includes the primary investigator (PI), data coordinator, reviewers, editors and contract support.

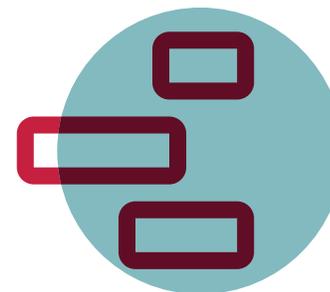
### Suggestions for assembling a proposal team:

- Assess your staff's current workload before assigning roles. If you do not have the expertise or availability, consider bringing in external consultants or ask your community partners to contribute to the proposal writing process.
- Depending on the scope and requirements of the proposal, you may have a small team of one or two writers or a larger team of several writers with the skills and knowledge relevant to the RFP.
- Designate a project manager to guide the team through the proposal development and submission process. Ideally, this person is not assigned to write any of the proposal narrative so that their time can be devoted to coordination and management tasks. However, if staff resources are limited, the project manager may also be a writer or even the primary writer. The role of the project manager is to:
  - › Oversee content development.
  - › Facilitate communication and collaboration among team members.
  - › Set up brainstorming sessions to generate solutions to issues that arise.
  - › Provide regular progress updates to ensure that the proposal stays on track and reflects a cohesive and comprehensive approach.



## Step 2: Develop A Proposal Writing Timeline

Developing a timeline is essential for ensuring that the writing process remains on track and that the proposal is submitted before the deadline. Begin by identifying submission deadlines, internal review dates and any other relevant milestones. Schedule regular team meetings to check in on deadlines and make adjustments as needed. Allow time for team members to review each other's work, provide feedback and incorporate revisions into the proposal.



As you continue to build the timeline, keep in mind the following suggestions:

- Create a visual representation of the schedule to share with your team on a spreadsheet or calendar. (See example in [Appendix 3-2.](#))
- Build in time to compare the proposal with the funder requirements checklist you developed in Module 2.
- Include some flexibility in the timeline to allow for adjustments needed to accommodate unforeseen challenges/events, staff leave or changes in direction.
- Be willing to adjust the schedule based on feedback from the proposal team.
- Check in with team members regularly to ensure that tasks are being completed on schedule and address any issues or obstacles that arise.
- Allocate time at the end of the timeline for finalizing the proposal, editing, formatting and ensuring compliance with submission guidelines.
- If time allows, plan for three levels of review:
  - › First review can be a rough draft or outline with bullets. Reviewers will primarily provide feedback on the content, making sure that all required and relevant information is included and in the correct section.
  - › Second review can be a more comprehensive review, ensuring that the common terminology is used, that the narrative is compelling.
  - › Final review can be conducted by the PI and/or someone in leadership. Changes are usually made by one person, who makes sure the proposal has “one voice” A checklist for this level of review is in [Appendix 3-1.](#)

### Step 3: Write Your Narrative

The proposal narrative is your opportunity to communicate to the funders that you have a project that is aligned with the intention of the RFP and is realistic within your organizational capacity and the timeline and budget allocated. It is also your opportunity to capture reviewers' attention with a statement that clearly articulates the problem or need your project addresses, followed by a narrative highlighting the strengths of your organization and your proposed approach. Integrating key messages and benefits of your research project throughout the narrative reinforces your ability to meet the requirements of the RFP. Most likely, you considered these factors when you were deciding whether to pursue the funding opportunity.



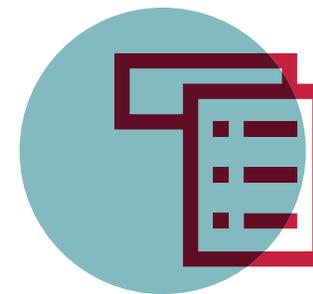
## Step 4: Outline The Proposal Narrative

The proposal narrative typically takes 10 to 20 pages to lay out. Some RFPs are prescriptive about the sections you should include in the proposal narratives, what should be included in each of them and how many points each will be worth. In this case, you know exactly how to outline the proposal and can allocate space for each section according to the points it is assigned. For example, if the organizational capacity and previous experience sections are both worth 15 points, plan to write about the same length for each of them.

Other RFPs will state what is to be included without providing a specific structure or scoring system. Since the narrative will be easiest to read and evaluate organized into sections, create an outline with a section devoted to each component. Look back at the Proposal Requirement Checklist you developed in Module 2 and create an outline using each of the elements the RFP requested.

Whether the guidelines are specific or general, most require the same essential components:

- **Title:** Choose a title that succinctly characterizes what it is you will study.
- **Abstract or executive summary:** If space allows (less than one page), clearly summarize the research proposal. Include the focus of the study, how you will determine the community's needs and priorities, how your study will contribute to what is already known about your community and the health problem you propose to address, and what you expect or hope to find as a result of the research.



- **Contextual factors:** Describe the community in which you propose to carry out the study. Include where the community is located, where the geographic boundaries of your study are, the characteristics of the setting in which the community is situated (rural/urban, etc.) and any demographic information that will accurately characterize the community.
- **Public health problem:** Identify the public health problem or therapeutic area the proposed research project will address, keeping in mind that CBPR focuses on public health problems that are relevant to the local community, and it uses an ecological approach that considers multiple determinants of health. Be sure to cite any sources of data accurately and consistently using a widely used citation format such as APA or MLA.
- **Research questions and/or hypothesis:** Identify a research question that is relevant and meaningful to the community. This can be generated through community engagement activities such as focus groups, interviews or surveys. It is essential to involve community members in this process to ensure that the research addresses their needs and priorities.

- **Goals and objectives:** List the goals and objectives for the research, ensuring that your description lays out how the goals will lead to your intended results. Clearly define the objectives of your project. What are your research questions or hypotheses? Outline the specific aims of your project and articulate the significance and potential impact of your research. Ensure that your objectives align with the priorities and interests of the funding agency and that community input has been considered.
- **Proposed research project:** Outline a detailed plan for how you will conduct your project. Describe how the project aligns with the research objectives outlined in the RFP.
- **Project timeline:** Lay out the project timeline from the kickoff date to the conclusion, including each task, project deliverable and milestone.
- **Research design, methods and analysis:** Describe the design and approach of the study. The description should include the type of research (e.g., community-based, participatory, empirical), the methods and the data collection, analysis and communication plan. Describe how you will analyze and interpret the data collected during the study.
- **Organizational capacity:** Provide a brief overview of the organization, including its mission, history serving the population and its capacity to carry out the proposed study. This may include a statement related to the organization's capacity to anticipate and mitigate risks.
- **Previous experience:** Describe previous research projects relevant to the current proposal, including the project's objectives, scope, duration and outcomes.
- **Partnerships:** Community-Based Participatory Research (CBPR) typically depends on strong partnerships between researchers and community members. Describe how you will establish and maintain these partnerships, including strategies for building trust and fostering collaboration. Highlight the expertise, resources or experience serving the population that each partner brings to the table and explain how you will ensure that decision-making processes are inclusive and participatory.
- **Staffing:** Outline the structure of the proposed project team including the team's expertise and capacity to execute the project successfully. If requested, provide names of key personnel, resumes, bios and an organizational chart for the project team.
- **Scientific rationale/benefits to the community:** Describe how the project will ensure that findings are meaningful and relevant to the community impacted by the public health problem or the scientific community. Discuss how you will involve community members in the interpretation of findings and the development of recommendations.
- **Communication plan:** How will you share the findings with the community? Who will the results be shared with and in what format? How will the findings be shared in a way that is accessible and useful to diverse audiences (e.g., community members, professional audiences).
- **Budget:** While the budget will be described in a separate section, your proposal project should demonstrate that the activities described in the narrative are consistent with the budget. Briefly outline your budget categories, describing how grant funds will be allocated and managed throughout the project's lifecycle.

## Step 5: Hold A Proposal Kickoff Meeting

Once the proposal outline is developed, the project manager should set up a meeting with the proposal team to “kickoff” the writing process. The kickoff meeting is an opportunity to clearly communicate the project’s objectives and expectations to all team members as well as to ensure everyone understands their roles and responsibilities.

Suggestions for a useful kickoff meeting:

- **Before the meeting:** Send the agenda ([Appendix 3-3](#) for example) to the participants along with the following materials:
  - › Proposal outline (with writing assignments)
  - › Writing template
  - › Proposal writing timeline

### Other Components Of The Application

After the kickoff meeting, as the writers begin on the narrative, the project manager can begin assembling the other materials requested in the RFP such as:

- **Cover page:** If formatting parameters allow for a cover page, be sure to include one. The cover page should capture the reviewers’ attention. Your cover page should include important information, e.g. funding opportunity title or name; funder or funding agency name; your organization’s name; date; contact information; etc. Optional: Photo of community or research element.



- **Cover letter:** Your cover letter should be limited to one page and should introduce your organization and the general topic of your proposed research project. Consider speaking to your organization’s mission and how the proposed research project will help you to advance your mission. The cover letter should convey your enthusiasm for the opportunity and your confidence that you have thoroughly corralled the resources you will need to carry out a strong research project that will benefit your whole community. It should highlight your ability to reach the population needed for the study.
- **Supplementary documentation:** Be sure to adhere to any guidelines from the funding agency on what or what not to append. Appendix material might include resumes of proposed staff, letters of commitment or support from partners or community leaders, a logic model or other figures to demonstrate your project vision and descriptions of any relevant past projects or other relevant experience.

## Appendix 3-1: Final Review Checklist

### Review Questions

- Have you reviewed your Proposal Requirement Checklist? Have you included each element on the list using the language in the proposal?
- Have you reviewed the list of scoring criteria you developed? Have you emphasized the things that are important to the funder?
- Have you described how community members will be involved in each stage of the research process?
- If you have multiple writers, does the proposal sound like "one voice?"
- Has the proposal been reviewed by an editor?
- Has the proposal been read by someone unfamiliar with the research methodology?
- Does the proposal adhere to the formatting and submission guidelines in the RFP?
- Are all required attachments and supporting documents included?



## Appendix 3-2: Sample Proposal Writing Timeline

Monday	Tuesday	Wednesday	Thursday	Friday
1 RFP Released First Reading	2 Second Reading Decision Meeting	3 Create Proposal Team and Outline	4 Kickoff Meeting	5
8	9 1st Drafts Due COB Initial Graphics Due	10	11 1st Review Due COB	12 Questions Due
15 Graphic Updates Due	16 2nd Drafts Due COB	17 2nd Review Due COB	18	19 Final Graphics Due
22 Writers Final Drafts Due COB	23 Final Reviews Due COB	24 Final Editing (Proposal Manager)	25 Finalize Document Produced	26 Submit Proposal
29	30 Proposal Due	31		

### Appendix 3-3: Sample Proposal Kickoff Meeting Agenda

Time	Topic	Description
10:00 a.m.	Agenda review and introductions	Staff and partners introduce themselves and their roles on the project.
10:10 a.m.	Overview of RFP	Provide a brief overview of the funding opportunity.
10:15 a.m.	Discuss planned approach	Describe the scope of work planned and high-level description of the research objectives and design.
10:45 a.m.	Proposal preparation process and logistics	Share timeline for writing and proposal submission. Timeline should include writing assignments. Discuss any future meetings and process for sharing files.
10:55 a.m.	Wrap up	Ask for questions on meeting content. Review next steps.