

## TEN STEPS FOR PREPARING CLEAR, UNDERSTANDABLE APPLICATION GUIDANCES OR RFPs

This brief guide is designed to help you write – or rewrite – an application guidance or request for proposals (RFP) or program announcement in clear English. Its objective is to help you write and format an RFP that your target audience can understand in one reading. Plain language techniques can help you. The important thing is to communicate in plain English. (In this summary, the term *RFP* is used interchangeably with *application guidance*, *guidance for applicants*, and *program announcement* to mean a public announcement from your agency seeking applications for competitive funding for a particular type of program.)

### 1. Start early.

Developing a plain English application guidance or RFP takes time. You may be preparing a new RFP or revising last year's RFP. If this is your first plain English experience, allow time to write, edit, and revise. Add at least three weeks to your usual time schedule for RFP development.

### 2. Involve senior and grants management staff as early as possible.

Be sure you understand Public Law 106-107, the Federal Financial Assistance Management Improvement Act of 1999 (see attached press release). It calls for simplifying federal application and reporting requirements and therefore supports use of clear writing in RFPs. Grants management staff can tell you how this new law may affect your RFP.

Talk to the senior person in your unit to understand what s/he wants emphasized or downplayed in the Program Guidance. Ask senior personnel or grants management staff about any standard or specific language that your RFP must include. If you see confusing language or a complex cover page format, find out whether this is being done by tradition or because it is a real requirement. For example, some agencies put a lot of complicated information on the cover sheet of every RFP. Find out whether this is necessary or simply habit.

Also ask if there have been any changes in Office of Management and Budget (OMB), departmental, or operating division (OPDIV) requirements. Find out whether any special review is required. Ask about any part of the RFP process that is unclear to you. Learn about any requirements that may affect the way you write the RFP.

### 3. Arrange for outside help if needed.

You may find this new style of writing hard or time-consuming, especially the first time. (It gets easier once you have a model.) If so, consider asking for help with your first plain

English RFP. The Leadership Campaign on AIDS (TLCA), Office of HIV/AIDS Policy (OHAP) can suggest consultants with experience in preparing plain English RFPs. Outside help is much more valuable if you get it early in the process. Last-minute rewrites are often less clear and accurate.

#### **4. Be sure you are comfortable with plain language and clear English principles and hints.**

Remember: you want your application guidance or RFP to be understandable to your target audience in one reading. This means you need to:

- Identify your target audience for this RFP (e.g., community-based organizations serving low-income communities, health departments, hospitals, universities, research institutions, companies).
- Think about what they want and need to know.
- Consider what technical terms they may know (like *needs assessment* and *epidemiologic data*) and what terms they may not know (like *randomized controlled studies* and *formal efficacy trials*).
- Review principles and hints for writing clearly.
- Think about how to organize and format your RFP.

#### **5. Review last year's RFP and an RFP (preferably from a similar program area) that has have been written using plain language techniques. See where changes are most needed to create a plain English RFP.**

Consider at least the following:

- **Literacy level.** How much education do readers need to understand the RFP as written? To find out, use the Fog Index on a few selected sections such as *Eligible Applicants* and *Program Requirements*. (See instructions in this package.)
- **Clarity.** What parts of the RFP are unclear or hard to understand? Are sentences too long or complex? Does the RFP include technical terms that the target audience may not understand?
- **Organization.** How hard or easy is it to find needed information? Would the RFP be clearer if you reordered it? What about the table of contents?
- **Repetition.** Is the same information repeated in several sections?

- **Headings.** Do headings need to be redone, perhaps in the form of questions that section will answer?
- **Format.** Do you need to add bullet-point lists? boxes? topic sentences or key words in bold? more white space? a simpler cover sheet, perhaps with a brief summary of the RFP?

**6. Create an outline that minimizes duplication and helps readers find needed information.**

Try stating headings as questions that each section will answer. If you include subsections, use a numbered outline format for the section headings. This helps the reader find the main sections and see the relationship among subsections.

**7. Write (or rewrite) the RFP, section by section, using plain language and other clear writing principles.**

If some sections are hard to write clearly and simply, ask for help. Go to someone in your agency or a consultant. Try reading your paragraphs out loud to see if they are easy to understand. Work section by section. Write key sections first – such as *Purpose*, *Eligible Applicants*, *Program Requirements*, and *Evaluation Criteria*. Then use the same terms throughout the RFP. Avoid repeating information.

**8. Obtain several reviews – and revise based on the feedback you receive.**

Begin with an internal review for content and clarity with those familiar with plain language techniques. Make needed changes. Then ask at least 1-2 people from the target population (perhaps current grantees that will not be competing for funds this year) to review the draft RFP if possible. This takes time but provides very useful feedback. Ask if they could find needed information and if they could understand it in one reading. Revise again as needed. Get necessary approvals.

**9. Format the RFP to be attractive and easy to use.**

Make the document look good and easy to read. Choose several different type sizes for headings. Leave a blank line between paragraphs. Use bulleted lists. Highlight main points with **bold** and *italics*, and use the Times New Roman or another easy-to-read serif font for the body text. Use boxes for examples. Leave plenty of white space, including margins of at least one inch all around. If feasible, use two columns to increase readability.

**10. Get feedback – and share it.**

Find out how your RFP works! Ask external review panel members how they felt using the RFP. Get feedback from panel Chairs and agency personnel who staffed the review process. Find out if they believe the RFP contributed to better applications. Ask new grantees whether it was easier to write the application, and what made the most difference. Find out what worked – and what needs more work. Make notes on a copy of the RFP. Summarize what you have learned and file it for next year. Also share this information with colleagues. Encourage them to try writing plain English RFPs.