



Robert Wood Johnson Foundation

# Call for Proposals Writing Guide

Content guide for RWJF grant competitions

**MARCH 2021**



## Introduction

This Writing Guide was developed to assist staff as they draft their standard call for proposals (CFP) or call for applications (CFA), which are solicitations made by RWJF or one of our national programs. While each program is substantively different, every CFP should use standard RWJF terminology, style, and language as outlined on the following pages.

- **Please pay careful attention to items marked in green.** This **standard content** has been approved by RWJF and must be included in all CFPs.
- Text in blue indicates where author must insert hyperlinks.
- The order of subheads and sections must be followed as outlined in this document.

### ADDITIONAL HELP

All calls for proposals should be created using the CFP macro found in MS Word on all RWJF computers. As with all RWJF publications, please also refer to the *RWJF Writing Style Guide*, for more detail on formatting, punctuation, and grammar.

In document footer, include: © <current year> Robert Wood Johnson Foundation; <CFP><CFA>: <program focus area>;<month and year of CFP publication>;<page numbers>.

Any questions or comments on the CFP content or CFP macro should be directed to [nationalprogramservices@rwjf.org](mailto:nationalprogramservices@rwjf.org).

### GLOSSARY OF TERMS

- call for <proposals><applications> (lowercase), but “CFA”, “CFP” are acceptable after first expanded mention.
- When referring to the program scholar/fellow recipient, at first mention, spell out: e.g., RWJF Clinical Scholar (title case), but in subsequent shortened references, “scholar” or “fellow” may be used.
- Culture of Health: always spelled out and title case
- national program name: no longer italicize full or shortened name
- national program office (lowercase) but “NPO” is acceptable after first mention
- national coordinating center (lowercase) but “NCC” is acceptable after first mention
- usually “program” is not part of official program name, so should be lowercase
- national advisory committee (lowercase) but “NAC” is acceptable after first mention

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## Call for Proposals Content Section

### <year> Call for Applications or Call for Proposals

Proposal Deadline: <Month day, year (x p.m. ET)>

### <Program Name>

#### **BACKGROUND** (approximately 750 words)

- Explain the issue being addressed; provide information on why RWJF is concerned; discuss how it affects health and health care; and why solutions should be proposed.
- If relevant, include references to studies and statistics (with appropriate sources) that document the issue.
- If interventions are proposed, explain why the program's intervention(s) are appropriate, given the nature of the problem.
- Explain relationship to team/portfolio objective. (May insert link to relevant team's home page from [rwjf.org](http://rwjf.org).)

#### **THE PROGRAM** (for traditional CFPs) or **PURPOSE** (approximately 750 words)

State program goals.

- Include number of grants to be awarded.
- Include individual grant award amounts.
- Include type of grants to be awarded (e.g., scholarship, planning, implementation, evaluation, research).
- Include duration of grant period.
- Describe specifics of program components; expected grantee accomplishments; key issues; explanation of types of grants to be awarded; matching fund requirements; assistance provided to grantees; types of issues that could be addressed.

#### **TOTAL AWARDS** (use bullet format)

- State total awards/stipend amount(s) per site/scholar. Use language such as "up to and including" to be as specific as possible when stating grant dollar ranges.
- List number of sites/scholars to receive awards (e.g., up to five projects will receive awards).
- Provide duration of awards (e.g., a 13-month grant; grants between 12 and 24 months).

Note: If funding approval is scheduled, but not received prior to the CFP release date, senior vice president approval is required and the following language should be included:

#### **Foundation funded:**

The grant opportunity outlined in the call for <proposals><applications> is contingent upon final funding confirmation from the Robert Wood Johnson Foundation for such grants.



**Regranting:**

The grant opportunity outlined in this call for <proposals><applications> is contingent upon [the NPO] receiving final funding confirmation from the Robert Wood Johnson Foundation for such grants.

**ELIGIBILITY CRITERIA** (*approximately 300 words; bullet format helpful*)

Eligibility criteria are used to help us narrow down the field of potential applicants. These objective criteria should allow those interested in the program to determine quickly whether they are eligible or not to apply. This section is not related to whether the proposal will be selected for funding. Examples include: “*be a junior faculty in any discipline that could lead to tenure*” and “*applicants that are based at institutes of higher education.*”

- Describe types of organizations or individuals that will be considered for grant funds (e.g., physicians, researchers, child advocacy groups, counties with a population greater than 500,000).
- If a collaboration or multiple organizations or parties is required, describe the types of organizations that may participate in the effort.
- While each collaborating organization must be described in detail in the proposal, state that only one organization may represent the collaboration and be the lead contact in the application process.
- Describe any rules that determine whether a project will or will not be considered.
- If the call is for an advocacy program (e.g., any program that: (1) has—as a significant or primary focus—creating policy changes that are likely to include new legislation or budget appropriations at the federal, state, or local level; and (2) seeks to achieve its goals, in whole or in part, through direct engagement with policymakers and/or the general public), the following standard language is recommended:

The successful <applicant organization><project director> should have:

- A demonstrated history of managing funds, (e.g., foundation or government) to support nonlobbying advocacy efforts.
- Strong previous or current relationships with legal counsel with expertise in the lobbying and political activity restrictions that apply to public charities and private foundations.

There are three text options approved by the Law Department for the Eligibility Criteria section. Please select one of the three options below:

**Option 1: Limited to public entities and public charities only.** Generally, only public charities and public entities should be eligible to receive awards that involve regranting to individuals or organizations, awarding prizes to individuals or organizations, or funding advocacy programs that may involve lobbying with non-RWJF dollars. In these instances, or in any other instance that the award should be limited to public entities and tax-exempt public charities, the following standard eligibility criteria language should be used:

- Applicants must be either public entities or nonprofit organizations that are tax-exempt under Section 501(c)(3) of the Internal Revenue Code and are not private foundations or nonfunctionally integrated Type III supporting organizations. The Foundation may require additional documentation.



- Applicant organizations must be based in the United States or its territories.

**Option 2: Preference for public charities and public entities.** If there is no reason to prohibit for-profit entities and private foundations from receiving awards, the following standard language should be used:

- Preference will be given to applicants that are either public entities or nonprofit organizations that are tax-exempt under Section 501(c)(3) of the Internal Revenue Code and are not private foundations or Type III supporting organizations. The Foundation may require additional documentation.
- Applicant organizations must be based in the United States or its territories.

**Option 3: Awards to organizations for individual scholars or fellows.** If the award is made to an institution for the benefit of an individual scholar or fellow,<sup>1</sup> the following standard language should be used:

- Applicant organizations<sup>2</sup> must be based in the United States or its territories.
- *Optional:* Applicant organizations must be either public entities or nonprofit organizations that are tax exempt under Section 501(c)(3) of the Internal Revenue Code and are not private foundations or nonfunctionally integrated Type III supporting organizations. The Foundation may require additional documentation.
- Individual candidates for receipt of award funds must be U.S. citizens or permanent residents<sup>3</sup> at the time of application or individuals granted Deferred Action for Childhood Arrivals (DACA) status by the U.S. Citizenship and Immigration Services. As federal policy or laws change, we may need to consider adjustments in eligibility and grant terms.
- Individual candidates for receipt of award funds cannot be related by blood or marriage to any Officer or Trustee of RWJF, or be a descendant of its founder, Robert Wood Johnson.<sup>4</sup>

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<sup>1</sup>Note that most award programs to individuals require Internal Revenue Service pre-approval of the procedures used to make the awards. Please check with the Law Department to ascertain that the program either is operating under these pre-approved procedures or is not subject to these rules.

<sup>2</sup>Some programs use the term “sponsoring institution” or “home institution” instead of “applicant organization” to define the institution that will receive the grant to benefit an individual scholar or fellow. Either term is acceptable.

<sup>3</sup>Optional: Applicants who are permanent residents and not green card holders should contact the national program office before applying to determine whether they can satisfy the program’s eligibility and documentation requirements.

<sup>4</sup>The following text should appear in a footnote in the CFP: The Officers are the Chair of the Board of Trustees; President and CEO; Chief of Staff; Executive Vice President; General Counsel; Secretary; Assistant Secretary; Treasurer; Assistant Treasurer; and Chief Investment Officer of the Foundation.

- Federal, state, tribal, and local government employees are eligible to apply unless they are considered government officials under Section 4946 of the Internal Revenue Code.<sup>5</sup>

### **OUR EQUITY, DIVERSITY, AND INCLUSION COMMITMENT**

The Robert Wood Johnson Foundation is committed to building a Culture of Health that provides everyone in America a fair and just opportunity for health and well-being. Achieving this goal requires focus on equity, diversity, and inclusion. To that end, we are committed to fostering diverse perspectives. We recognize that individuals' perspectives are shaped by a host of factors, such as their race, ethnicity, gender, physical and mental ability, age, socioeconomic status, gender identity and expression, sexual orientation, familial status, education, religion, legal status, military service, political affiliation, geography, and other personal and professional experiences.

We know that the presence of diverse perspectives alone is not sufficient. Therefore, we also are committed to creating inclusive environments where all individuals are encouraged to share their perspectives and experiences. We believe that only through valuing our differences and similarities, and remaining vigilant in advancing equity, will we be able to maintain an equitable workplace and actively pursue equity in all aspects of our work. We commit to being continuous learners and working alongside others to cultivate equity, diversity, and inclusion.

### **SELECTION CRITERIA** (*approximately 300 words; bullet format helpful*)

Selection criteria are used to choose from among eligible applicants. They are usually subjective, that is, they require some assessment, some judgment by reviewers. The Foundation uses selection criteria to identify the skills, infrastructure, relationships and other factors of a successful grantee. Examples include: *"The potential of the project to influence policy or practice beyond the immediate project community"* and *"Demonstrated ability to deliver quality mental health services."*

- Describe, in general terms, criteria used to assess eligible applications. Where possible and appropriate, use specific numbers (e.g., size of target population).
- If only one grant per state/community, describe how multiple submissions will be handled.
- Explain what constitutes "matching funds" or "proof of matching funds."
- Explain whether the program will seek diverse representation (e.g., geographic, ethnic, socioeconomic) or whether other external factors will come into play when making decisions about the final selection of grantees.

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<sup>5</sup>The following text should appear in a footnote in the CFP: For these purposes, a government official is defined as any person who holds one of the following:

1. An elective public office in the executive or legislative branch of the Government of the United States.
2. An office in the executive or judicial branch of the Government of the United States, appointment to which was made by the President.
3. A position in the executive, legislative, or judicial branch of the Government of the United States—(A) which is listed in schedule C of rule VI of the Civil Service Rules; or (B) the compensation for which is equal to or greater than the lowest rate of basic pay for the Senior Executive Service under section 5382 of title 5, United States Code.
4. A position under the House of Representatives or the Senate of the United States held by an individual receiving gross compensation at an annual rate of \$15,000 or more.
5. An elective or appointive public office in the executive, legislative, or judicial branch of the government of a State, tribe, possession of the United States, or political subdivision or other area of any of the foregoing, or of the District of Columbia, held by an individual receiving gross compensation at an annual rate of \$20,000 or more, and a significant part of whose activities include "the independent performance of policymaking functions."
6. A position as personal or executive assistant or secretary to any of the foregoing; or
7. A member of the Internal Revenue Service Oversight Board.



- If projects are expected to include activities that require special skills in terms of legal compliance or financial oversight (e.g., nonlobbying advocacy activities or regranting programs), applicants should be required to demonstrate the expertise and existing organizational systems that will enable them to satisfy the relevant legal and financial requirements.

**EVALUATION AND MONITORING** *(not applicable for scholars/fellows programs) May require separate sections as noted below. (approximately 300 words; bullet format helpful)*

Include references to “evaluation” only if an evaluation is planned—or may be planned. Otherwise, references to “evaluation” can be omitted—but references to “monitoring” should be retained.

An independent research group selected and funded by RWJF will conduct an evaluation of the program. As a condition of accepting RWJF funds, we require grantees to participate in the evaluation.

Grantees are expected to meet RWJF requirements for the submission of narrative and financial reports, as well as periodic information needed for overall project performance monitoring and management. We may ask project directors to participate in periodic meetings and give progress reports on their grants. At the close of each grant, <the lead agency> is expected to provide a written report on the project and its findings suitable for wide dissemination.

*Alternative language for CFPs with more specific requirements:*

**EVALUATION**

The purpose of evaluation at RWJF is learning rather than accountability. An independent research group selected and funded by RWJF will conduct an evaluation of the program. RWJF intends for this project to contribute to national efforts to <insert appropriate terminology>. Therefore, the program will publicly release results from this evaluation. The evaluation team will study <insert appropriate terminology>. As a condition of accepting RWJF funds, we require grantees to participate in the evaluation. Grantee participation includes assisting with necessary data collection to accomplish the evaluation objectives. These data collection efforts may include <insert appropriate terminology>.

Include program-specific evaluation information as needed.

**MONITORING**

RWJF monitors the grantees' efforts and careful stewardship of grant funds to assure accountability. Grantees will be required to submit periodic narrative and financial reports.

**APPLICANT SURVEY PROCESS**

Include the following language. Contact your R-E-L officer if there are questions.

The <principal investigator (PI)> <project director (PD)> of the <proposal> <application> may be contacted after the submission deadline by SSRS, an independent research firm. The <PI> <PD> will be asked to complete a brief, online survey about the <proposal> <application> process and applicant characteristics. This voluntary questionnaire will take no more than 15 minutes to complete. Responses provided to SSRS will not impact the funding decision for your proposal in any way.



SSRS will protect the confidentiality of your responses. RWJF will not receive any data that links your name with your survey responses.

### USE OF GRANT FUNDS

#### **Option 1: For traditional CFPs**

Grant funds may be used for project staff salaries, consultant fees, data collection and analysis, meetings, supplies, project-related travel, other direct project expenses, including a limited amount of equipment essential to the project, and indirect costs to support the general operations of the applicant organization. In keeping with RWJF policy, grant funds may *not* be used to support clinical trials of unapproved drugs or devices, to construct or renovate facilities, for lobbying, for political activities, or as a substitute for funds currently being used to support similar activities. Additional budget guidelines are provided in the online application materials.

#### **Option 2: Applicable in some programs that fund scholars/fellows**

Grants have been made to the participating institutions in accordance with RWJF's regular funding guidelines. Under the program, the institutions provide scholars with their stipends, health insurance, expenses associated with the move to their fellowship site, and funds for a computer. Financial support also is available at each institution for expenses associated with scholars' research, including travel.

### OPEN ACCESS

In order to ensure RWJF-supported research is made accessible to a wide and diverse audience, grantees who publish findings in peer-reviewed publications must do so in open access journals and/or must include funds in their budgets to cover the cost of making the resulting publications open access (typically \$2,000–\$5,000 per manuscript).

### HOW TO APPLY

Method of receiving proposals, specifics on content formatting, etc.

Things to consider:

- Does the program require a brief proposal as a first phase or should applicants submit only full proposals?
- Is terminology consistent throughout (e.g., proposals vs. applications, or brief proposals vs. letters of intent)?
- Is there a page limit, character limit or format requirement for proposals or additional documents (e.g., a five-page proposal, PDF, MS Word file)?
- What additional documents, if any, should be included (e.g., CVs, letters of support, memoranda of understanding)?
- Will there be applicant web conference calls, applicant workshops or site visits? Are they required or optional? Where can details be found? Is registration required?





Include one of the **standard language** options below, depending on the requirements for this program:

**Option 1: For one-phase programs with site visit option when using the RWJF online system**

<Proposals><Applications> for this solicitation must be submitted via the RWJF online system. Visit [www.rwjf.org/cfp/<program code>](http://www.rwjf.org/cfp/<program code>) and use the “Apply Online” link. If you have not already done so, you will be required to register at [my.rwjf.org](http://my.rwjf.org) before you begin the <proposal><application> process.

*Site Visits* (if applicable):

RWJF will conduct an in-person, <xx>-day site visit with each finalist applicant, who will be selected when we complete the <proposal><application> review process. At that time, finalists will receive more information about the site visits.

Please direct inquiries to:

<Name, *title*>

Phone: <(xxx) xxx-xxxx>

Email: <xxx@xxx.xxx>

All applicants should log in to the system and familiarize themselves with online submission requirements well before the submission deadline. Staff may not be able to assist all applicants in the final 24 hours before the submission deadline.

RWJF does not provide individual critiques of <proposals><applications> submitted.

**Option 2: For two-phase programs with site visit option when using the RWJF online system**

<Proposals><Applications> for this solicitation must be submitted via the RWJF online system. Visit [www.rwjf.org/cfp/<program code>](http://www.rwjf.org/cfp/<program code>) and use the “Apply Online” link. If you have not already done so, you will be required to register at [my.rwjf.org](http://my.rwjf.org) before you begin the <proposal><application> process.

There are two phases in the competitive proposal process:

*Phase 1: <Brief Proposals>or<Letters of Intent>*

Applicants must submit a <brief proposal><letter of intent> that describes the project and includes a preliminary budget.

*Phase 2: Full Proposals*

Selected Phase 1 applicants will be invited to submit a full proposal of no more than <x> pages accompanied by a detailed budget, budget narrative, and additional information.

*Site Visits* (if applicable):

RWJF will conduct an in-person, <xx>-day site visit with each finalist applicant, who will be selected when we complete the <proposal><application> review process. At that time, finalists will receive more information about the site visits.

Please direct inquiries to:

<Name, *title*>

Phone: <(xxx) xxx-xxxx>

Email: <xxx@xxx.xxx>

All applicants should log in to the system and familiarize themselves with online submission requirements well before the submission deadline. Staff may not be able to assist all applicants in the final 24 hours before the submission deadline.

RWJF does not provide individual critiques of <proposals><applications> submitted.

**PROGRAM DIRECTION** (for traditional CFPs released through an RWJF national program)

Direction and technical assistance for this program are provided by the <Name of Institution>, which serves as the national program office located at:

**<Program or Institution Name>**

<Street Address>

<City, State Postal Abbreviation zip code>

Phone: <(xxx) xxx-xxxx>

Fax: <(xxx) xxx-xxxx>

Email: <xxx@xxx.xxx>

Website: <www.xxx.org>

Both NPO and RWJF staff listings are limited to three staff members with titles noted below:

Responsible staff members at the national program office are:

<Name, Degree>, *director*

<Name, Degree>, *deputy director*

<Name, Degree>, *title*

Responsible staff members at the Robert Wood Johnson Foundation are:

<Name, Degree>, <*senior*> *program officer*

<Name, Degree>, <*senior*> *program officer and director* (no need to include team name)

<Name, Degree>, *program financial analyst*

(If applicable):

This program has a national advisory committee that makes recommendations about grants to Foundation staff. RWJF will make all final grant decisions.

National Advisory Committee

<Name, Degree>

<Title>

<Institution Name>

<City, State Postal Abbreviation>

OR

- List of selected grants funded (optional)
- List of various reference materials (optional)

**KEY DATES AND DEADLINES**

List key deadlines, informational web conference calls; brief and full proposal deadlines; award notification; start of grants. The following list is illustrative for formatting and wording for these



select key dates. Please include a comprehensive list of key dates below.

- **<Month date, year (x p.m.–x p.m. ET)>**  
Optional applicant webinar. Registration is required [through this link](#).
- **<Month date, year (3 p.m. ET)>**  
Deadline for receipt of brief proposals (if required).
- **<Month date, year (3 p.m. ET)>**  
Deadline for receipt of full proposals.

### **Applicant Deadline Policy**

All proposals for this solicitation must be submitted via the RWJF online system. Visit [www.rwjf.org/cfp/<program code>](http://www.rwjf.org/cfp/<program code>) and use the “Apply Online” link. If you have not already done so, you will be required to register at [my.rwjf.org](http://my.rwjf.org) before you begin the proposal process.

All applicants should log in to the system and familiarize themselves with online proposal requirements well before the final submission deadline. Please note that, in the 24-hour period leading up to the application deadline, staff may not be able to assist all applicants with any system-related issues. Therefore, we encourage you to submit your proposal well before the deadline so that any unforeseen difficulties or technical problems may be addressed in advance.

**Late submissions will not be accepted for any reason.** While late submissions will not be accepted, RWJF may choose, at its sole discretion, to extend the application deadline for all applicants. Such extensions generally will be granted only in the event of: (1) a verified issue with the RWJF application system that prevented completion and submission of applications; or (2) a disaster, emergency, or significant internet outage that affects one or more regions. For purposes of this policy, a region is generally considered to be one or more states. RWJF strives to give all applicants any support needed to successfully submit their proposal prior to the deadline. Submission is defined as all sections completed, marked finished, the proposal “submit” button used, and the proposal status shows “Submitted.” If the deadline is extended for any reason, the extension will be posted on the funding opportunity page at [rwjf.org](http://rwjf.org). In addition, an email will be sent to all individuals that have started an application in the RWJF online system.

### **ABOUT THE ROBERT WOOD JOHNSON FOUNDATION**

For more than 45 years, the Robert Wood Johnson Foundation has worked to improve health and health care. We are working alongside others to build a national Culture of Health that provides everyone in America a fair and just opportunity for health and well-being. For more information, visit [rwjf.org](http://rwjf.org). Follow the Foundation on Twitter at [www.rwjf.org/twitter](http://www.rwjf.org/twitter) or on Facebook at [www.rwjf.org/facebook](http://www.rwjf.org/facebook).

Sign up to receive email alerts on upcoming calls for proposals at [www.rwjf.org/manage-your-subscriptions.html](http://www.rwjf.org/manage-your-subscriptions.html).

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