

HOW TO BE CREDIBLE,
CONVINCING,
AND PERSUASIVE:
**A HANDY GUIDE TO WRITING
COMPELLING PROPOSALS
AND POSITION PAPERS**

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INTRODUCTION

Around October every year, the Advocacy Service, and particularly the staff member in the Governance Portfolio gird our collective loins, knowing that we are likely to field a flood of requests for assistance to get reports, papers and proposals out by November and the end of the Office Bearer term.

In 2014 the Advocacy Service secured extra funding from the University to increase its staff by 1.2 EFT. How did we do this? By a proposal of course! More importantly, the extra role enabled us to set up an annually rotating Governance Portfolio, releasing an Advocate from complex casework in order to focus on resourcing Student Office Bearers.

This guide has come about after years of experience where we have seen great ideas sink into oblivion at the final leg of Office Bearer terms, because the initiative ran out of time, and putting together a great paper by then was simply impossible.

Unfortunately, we have also seen student-led proposals founder when they hit their audience, because they lack credibility, having failed to take an appropriately evidence-based approach. This is a serious concern for UMSU. Firstly, such papers, even though written by Student Office Bearers from UMSU departments, will be regarded by the University as representing the position of the entire organisation. Secondly, student representatives seldom get more than one chance to put a position or proposal to the University. That means, once a paper is put into circulation, it will be regarded as covering the issue, and if it is shot down, or holes are poked through its logic or evidence base, there will not be an opportunity for a second chance. Therefore, the stakes are high.

However, we do not want you to lose heart, become overwhelmed, and ditch your great ideas! We just want you to plan, and get off on the right foot with them, so you can see them come to glorious fruition before you move on to even greater things.

1 FIRST THINGS FIRST: THE PLAN

If you want to achieve your desired outcome, your proposal or position paper needs to be succinct, credible, engaging, and most of all *persuasive*.

There are three essential elements when framing a position paper or proposal: planning, research and evidence gathering, and the write up.

It's helpful to answer the following before you begin:

1. What is the problem you want to address?
2. What kind of paper is required – a proposal or a position paper? and
3. Who is the intended audience?

WHAT'S THE PROBLEM?

The first question to answer is: what is your purpose — i.e what problem are you trying to solve, or which issue/s are you trying to address in your paper?

If you don't already have credible evidence of the problem or issue — how will you test your hypothesis that there is a problem? You may consider surveys, or focus groups, interviews, literature reviews and other sources of concrete data. More on these methods later.

You then need to develop a vision of how the problem or issue is best resolved, and what resources that would require. How does it fit with University policies and existing resources or programs? If it requires financing, what are the potential funding options?

To get the ball rolling, hold a kick-off meeting: seek advice and support from Advocacy. We can guide you through this question and answer caper, and make sure you scope your initiative to both meet your aims, and be achievable during your term in office.

WHAT KIND OF DOCUMENT?

The answers to the above questions should logically inform the kind of document you need to prosecute your case and achieve your purposes.

Proposals

A proposal will outline and provide evidence for the existence of a problem, and provide persuasive arguments in favour of activities or initiatives aimed at solving it.

A robust proposal should do the following:

- Provide a comprehensive and coherent presentation of a problem and your proposed solution.
- Highlight the importance of the initiative; making reference to any relevant University strategic documents and connecting the initiative to the University's own goals and values.
- Situate the initiative in the current context.
- Set out the project or actions required to implement the initiative.

In respect of any proposed projects, remember to make them SMART: Sustainable, Measurable, Achievable, Realistic, Time Bound.

Position Papers

Position papers seek to influence an approach or policy, rather than proposing a specific action or initiative¹. A position paper may use a similar style and format to a proposal, however instead of recommending a specific initiative or project as a solution, it promotes an approach or stance in respect of an issue or policy. Position papers may be based on ideological or rights based arguments, and focus on presenting one side of an arguable position. The sole object of a position paper is to persuade your audience that your view is not only defensible, but the optimal approach. Generally, a position paper is the appropriate format to influence university or public policy.

Position papers aiming to influence policy or law reform need to achieve two objectives:

1. to communicate, coherently and concisely, the position taken by UMSU (remember UMSU as a whole, not just your department) in relation to a policy area; and
2. to influence policy or law makers, to act in accordance with UMSU's position, or minimally to adopt a position that is close to UMSU's (or closer than it otherwise would have been).

Your paper achieves these objectives by doing the following:

- describing an issue or problem being addressed in policy or legislation, and its implications for students;
- setting out the current way in which that problem is addressed, if at all;
- describing possible options or alternatives for addressing the issue (the policy imperative); and
- recommending a policy approach which will minimise negative impacts, and maximize beneficial outcomes for students, while still meeting that policy imperative.

Developing your position

Finally, don't forget you are acting at all times on behalf of the entire organisation. Your position needs to be shared by or consistent with the organisation's approach. This means that a good place to test and develop your view is through liaising early and often with the Advocacy Service where you can bounce your ideas around. We can help you to design and plan your process from the beginning, including setting up a working group if appropriate for the project.

¹ In some cases, you may not be advocating a preferred position, but simply want to ventilate a number of views on an important topic — this would be a *Discussion paper*.

WRITING FOR YOUR AUDIENCE

This requires first and foremost that you answer the question — who will read this thing — who is the intended audience? Answering this question allows you to properly consider your readers' knowledge of the issue, and target your arguments to build on that knowledge. If your audience is likely to be relatively unformed, you will need to put more effort into establishing the context. If they are likely to be very familiar with the issue, your focus will be on information and evidence which supports your position or proposal. If they are experts, then you really need to make a very convincing case that you are properly across all of the relevant issues.

Answer these questions before you move on:

1. Who is going to read it?
2. How much do they know about the issue?
3. What do you want your audience to take from your proposal or paper?
4. How can you convince and motivate them to take your suggested actions upon reading your proposal or paper?

Remember: if you are addressing a university audience, you are very likely to be addressing academics (e.g. the Academic Board). In the University academic rigour is... *de rigueur*.

2 GATHER EVIDENCE

An argument itself does not prove or disprove a point — but sound evidence can.

The aim of your paper is to persuade your audience that your view and recommendations are worthwhile. This means your arguments need to be concise, succinct and persuasive. To be persuasive, you need to support your arguments with evidence. Moreover, evidence does not just support your claim; it also refutes the validity of counter arguments.

TYPES OF EVIDENCE

There are a range of approaches to evidence gathering. Ask yourself — is this a well researched area? If the answer is yes, then you might start by capitalising on the evidence already collected in a literature review or summary of relevant research. If it is not a well researched issue, then it will be up to you to gather evidence yourself, for example by casework data and case studies, surveys or focus groups.

Literature reviews

First rule of the lit review — don't cherry pick. You will almost certainly find a diversity of data, some of which aligns with your position, some of which might not. You need to address both and explain why you give more credibility to the evidence you prefer. Of course, if you find a weight of credible evidence against your proposition, you may also be persuaded your position needs finessing or revisiting. Sometimes we get it wrong. It's far better to reconsider a flawed position or argument early, than try to float a boat with a massive hole in its hull.

Case work data and case studies

Depending on the issue, the Advocacy or Legal Services might be able to provide casework statistics or other data and case studies to help evidence your position or proposal. Don't discount the power of the case study. A well put together case study personalises the issue, and grounds your arguments in lived experience. They can be incredibly affecting, exposing the reader to impacts and consequences they have never considered.

Surveys, consultations and focus groups

Surveys are useful, but to be statistically meaningful and worth the time and effort they take to conduct and analyse — you need to sort your methodology before you begin! Think about how long you have — can you properly plan and construct a meaningful survey? Perhaps small focus groups might be more manageable.

If you decide you have time to do justice to a survey, ask yourself how will I analyse the data? Quantitative data can be easy to crunch, but still tricky to properly analyse. You need to understand concepts such as statistical significance, sample sizes and return rates, how to normalise data etc. On the other hand, qualitative data can be a rich source of information, but requires an understanding of thematic analysis, or another recognised method of extracting meaningful data from the responses.

In other words, getting credible data is much more than banging some questions in a survey and getting some responses. You need to understand how to set up the methodology to give you the data you will be able to use for your paper. You need time to plan, execute and analyse it. But fret not, help is at hand! You should run your ideas past the Advocacy Service as early as possible. We have research experience, and may also be able to help you find other students with relevant research skills in the area, who can help make your data work for you.

3 WRITING THE PAPER

FORMATS

The way a document is set out has a huge impact on its effectiveness. Time poor readers need all the help they can get to digest the important points, and understand the goal of the paper.

PLAN YOUR OUTLINE

Depending on your audience, the problem you are tackling, and the evidence you are going to put forward, your paper may vary in format. As a general guide, you should plan and follow an outline to ensure you present your case as coherently and persuasively as possible.

Here's an example:

1. Introduction

- 1.1. Introduce who you are and why you have an interest in and knowledge about the issue. Remember who your audience is — do they know much about the issue? Are they familiar with you and your role?
- 1.2. Set out the context, history and relevant background on the issue. In some cases where there has been a lot of research on the issue, you may even do a brief literature review.

2. Executive Summary

- 2.1. Punchy sentences in point form which go straight to the issue, summarising the issue and your recommendation(s). This is like a good press release — grab the reader's attention and encourage them to read on.

3. The Issue/problem

- 3.1. State the problem and cite the evidence for your assertion. Having established the relevant background information and context, you can set out some more detail on the issue, including the cause/s of the problem or issue, the reason why it is regarded as a problem, its effects etc. Look at things like — why now is the high time to address the issue, what might happen if the issue is not tackled now?

If it's a policy matter, and there's policy already in place — explain it, what it was formulated to achieve, and how well or poorly it currently meets its purpose. Describe the impact of the policy, and why it needs to be changed and why now?

- 3.2. Justify why and how it should be addressed, using data and evidence. This is not merely your opinion, or a general "vibe" — but the place to roll out independent sources which support and illustrate your claims.
 - 3.2.1 Set out each recommendation relevant to the points above. What should be done in respect of the problem or issues identified? This is not limited to your suggested solutions or actions, but why your position or proposal is superior to other options, including doing nothing. What are the advantages of your ideas, what benefits does it offer above other options (or not doing anything)? Think both short and long term. Discuss the impact and scale of benefits; the more people it positively affects, the better.

3.2.2 Detail how your solution will be implemented.

3.2.3 If relevant, examine other possible solutions and provide an evidence-based argument for why yours is superior.

3.2.4 Timing and budgets. Even if the proposal requires no funding or financial investment, it's a good idea to make this clear — as it is a benefit you can capitalise on. However, often proposals, will require some consideration of funding or finance. If this is the case, your audience needs to know what is the funding needed for, who will be responsible for getting it done, how long it will take — and of course — how much.

4. Conclusion

4.1. Summarise the problem and your proposal or position.

The conclusion is never the place to introduce new ideas or information; rather it is the condensed summary of the salient issues which bring the audience to the determination (hopefully) that your idea is a good one.

Typically, the reader should be able to read the conclusion and come away knowing:

- **what the problem is;**
- **why it's necessary to deal with it now;**
- **what will happen if you do nothing;**
- **your proposed solution/s;**
- **why your solution is better than alternatives.**

You might want to thank your audience for taking the time to read and consider your paper.

Policy Position Papers

Your paper will need to identify the relevant point the policy is in its formulation — that is, if the policy already exists, and you want to change it, your paper must detail the policy and its impact. Similarly, if it is a newly proposed policy, you will also have something concrete to base your position on, and you will seek to influence its development by arguing for your preferred approach. However, if you are addressing a currently unregulated area, you will also need to explain why it needs a policy, as well as what approach the policy should take.

Regardless, your position should be based on your research, including current literature, surveys, and consultations with experts and stakeholders supporting your arguments. Your arguments should be solidly grounded in the evidence, and flow coherently from the research you are citing. You want to take the reader logically through your reasoning, with each major argument flowing rationally to a conclusion. A mix of evidence, statistical data, qualitative research and case studies taken together are very compelling. If you can also appeal to the policy body's desire to be seen to collaborate and consult, all the better.

SET OUT THE ISSUE AND YOUR ANGLE PERSUASIVELY

The issue that you are raising and the solutions you are proposing may appear self-evident to you. However, you should never assume your audience shares your view or understanding.

You need to pitch to the knowledge level of your audience, and properly set out your position, without assuming anything. To do this, you will also need to persuade them that you have the requisite evidence to support your position, and sufficient expertise to implement any proposed action on your part.

Aristotle is the poster boy for rhetoric. We haven't been able to improve much on classical methods of persuasion in a few millennia: enter pathos, logos, and ethos.

Logos is an appeal to the rational — logic and facts. This means you need evidence — supporting data which can be clearly linked to your arguments. Once logos helps you set out the evidence and arguments for your assertions, ethos is employed to establish you as an authority on the subject. You employ ethos to persuade your audience that you understand the issue better than others, so your recommendations should be taken seriously.

These two combined are the lynch pin of a persuasive paper.

Don't forget pathos though. Used in the right measure, and coherently tied to your logos and ethos-based arguments, an appeal to emotion can be very effective in convincing someone that something that has a negative consequence for example, needs to change.

A common approach to arguing a position or putting a proposal is to use a linear process: defining the problem → analysing the options → and recommending a solution. However, this still leaves latitude for various people, influenced by their own background or cognitive biases, to draw different conclusions from the same facts. For this reason, sometimes a more compelling method is a narrative approach:

1. **Generate interest in and concern about the issue through negative narratives (case studies)**
2. **Inspire an aspiration for a different outcome by using positive narratives**
3. **Reinforce with logical reasoning based on other forms of evidence such as statistics, and current literature on the topic**

Finally, don't forget that arguments are more than contradiction², or a contest between opponents and proponents. Sound arguments identify common ground as well as disagreement. The best arguments will expose opportunities for collaboration, alliances, or at least compromise and negotiation.

² Google *Monty Python Argument Sketch*

Generally

Regardless of the format you use, there are a few more golden rules to maximise the impact and effectiveness of your paper.

- Be clear about the paper's objectives or purpose. Stay focused on that. Keep on message, and do it concisely.
- Keep the body of the paper as succinct as possible. Introduce your position or proposal, make your arguments supported by evidence, and make a conclusion or recommendation after each argument. Detailed evidence should go in the appendices.
- Don't rush it! Start early, consult with Advocacy often.

Presentation – Did we mention proof-reading and editing?

At this stage, give your draft a good once over yourself to eliminate any typos, spelling errors, extraneous material (over explanation, repetition), grammatical boo boos, and puh-leeze — check for passive voice — you might believe it sounds more formal — but it doesn't. When used inappropriately the passive voice just sounds clumsy and amateur³.

Then get someone else to read it. Seriously, get several others to proof it. This is critical — THERE MUST NOT BE CARELESS MISTAKES. You are asking your audience to spend their valuable time reading something, don't insult them by carelessness. Additionally, you want to be credible, and convincing. Poorly drafted documents will undermine all your best efforts, no matter how important or valuable the paper is substantively.

Finally, check it makes sense. Check it is coherent. Check your grammar and spelling again. Check that your recommendations or conclusions follow from the evidence.

³ Google it. It was googled vs I googled it.

4 FINAL TIPS:

- Format the document so it is easy to navigate.
- Consider using formatting styles which help focus the reader on important points, and separating information which is necessary but may distract from the main issue. Call-outs, side boxes etc can make it more visually interesting, and keep the reader focused on your message. UMSU Communications and Marketing department are your friends — use them!
- If you are presenting a lot of figures and tables — consider using graphs to make the information easier to assimilate.

5 WHERE TO GET HELP WITH WHAT

Planning, design, data and support	Advocacy & Legal
Setting up working groups	UMSU Management
Promotion, layout, and formatting	Communications and Marketing Department

Contact Advocacy:
suashelp@union.unimelb.edu.au
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