Checklist for Proposals

Put a checkmark in the box when you have completed each step:

Preparation

- ❑ **Step 1:** Review Keys to Success in the Process of Project Development:
  - Collaboration among programs, evaluation and finance departments.
  - Form a proposal writing team, and prepare a work plan for proposal development.
  - Identify and involve stakeholders and collaborators in the community.
  - Obtain all possible information about the donor (interests and requirements).
- ❑ **Step 2:** Conduct a *Needs Assessment* (review of the literature, focus groups, interviews).
- ❑ **Step 3:** Create a *Conceptual Model* (diagram on one page).
- ❑ **Step 4:** Develop a *Logical Framework* (complete this before beginning to write the proposal).

Step 5: Prepare Sections of the Proposal

Begin writing the proposal after the preparatory steps have been completed. Use the format presented below when the donor does not have its own requirements. If the donor has its own requirements, it is important to follow them closely. If the donor does not specify how long the proposal should be, it should probably be less than 15 pages long, and less than 10 pages long for a small project.

- ❑ **Title Page**
  - Name of project
  - Name of the organization submitting the proposal (include logo)
  - Contact person
  - Project duration
  - Name of potential donor and date submitted
- ❑ **Table of Contents** *(1 page)*
  - List all sections and include page numbers
- ❑ **Executive Summary** *(1 page)*
  - Include key information from each section of the proposal. (Write this section last).
- ❑ **Introduction and Justification** *(1–2 pages)*
  - Include discussion of problems to be addressed and present statistics or findings.
  - Include discussion of your organization and how your experience enables you to address the problem and be successful.
- ❑ **Goal and Objectives** *(1/2 page)*
  - The goal refers to broad and lofty changes that are needed to confront a problem. The project will most likely only contribute to addressing the problem, rather than eradicate it. The goal should indicate the *beneficiaries/focus population/group to be involved.*
  - Objectives should be SMART, or specific, measurable, appropriate, realistic and time-bound. Objectives refer to changes you would like to see in the beneficiary population or their environment. Objectives should be achievable in the proposed project time period, and should refer to the project location.
- ❑ **Activities** *(3–4 pages)*
  - Begin this section with a two- or three-paragraph narrative that summarizes the main activities or strategies.

- List each objective, and then the activities to support each objective. Describe the activities—who will conduct them, how long each activity will last, what tools or materials you will use, how you will attract people to your activities, etc.

❑ **Monitoring and Evaluation** *(1 page)*

- Include only a narrative section here. Here you can describe who will be responsible for evaluation, how the project will be monitored and evaluated (methodologies), and what are the major process and results indicators.
- Refer to the Logical Framework, which will be included in the Annexes section.

❑ **Gender** *(1/2 page)*

- Describe the gender inequities that are related to the health problem that your project seeks to address. Discuss strategies your project will employ to change gender norms or satisfy the needs of its beneficiaries.

❑ **Key Personnel** *(1 page or less)*

- Write about who will work on the project (management, administration, training, evaluation, finance). If volunteers will play an important role, discuss this.

❑ **Strengths and Innovation** *(1/2 page)*

- Highlight the project's strengths and aspects of your project that are innovative. Think about what makes your project stand out from others. You may restate the factors that you think will lead to the project's success.

❑ **Sustainability** *(1/2 page)*

- Describe some strategies that you will employ to continue the project once the funding ends. Describe ways to generate local income or seek other funders.

❑ **Budget** *(2 pages)*

- Create a detailed budget for yourself. For the donor, include a summary budget in a table format (with subtotals for major categories), which the project will report on. Also include a separate narrative summary (Budget Notes) describing what the components of each line item are, and for what purpose.
- Be consistent with the Key Personnel section.

Step 6: Include Annexes

❑ **Annex A: Conceptual Model** *(optional)*

❑ **Annex B: Logical Framework**

- This is a table that includes the goal and objectives. For each objective, list activities, process and results indicators, methodologies, and frequency of data collection.

❑ **Annex C: Work Plan**

- This is a timetable of activities.

❑ **Annex D: Other Annexes**

- Other annexes that could be useful: monitoring and Evaluation Work Plan/Timetable, study instruments, information on participants, curriculum, photos, quotes from beneficiaries.