Program Planning & Proposal Writing
Checklist

This checklist can help ensure that a proposal includes essential information in a logical order. In all cases, follow the instructions of the funder. Not all items on this checklist are relevant to all proposals. Use this as a guide to get organized or as a format for your proposal when the funder does not provide one.

SUMMARY

Provides a brief overview of the entire proposal, including the budget

☐ 1. Is at the beginning of the proposal

☐ 2. Identifies the applicant

☐ 3. Includes at least one sentence establishing the applicant's credibility

☐ 4. Defines the problems

☐ 5. Describes the outcomes

☐ 6. Provides an overview of the methods

☐ 7. Identifies major partners, if any

☐ 8. Identifies the requested funding period

9. Includes budget synopsis with

    ☐ a. amount requested

    ☐ b. cash and in-kind resources contributed by others, if any

    ☐ c. total cost of the program, if different from amount requested

    ☐ d. numbers consistent with Budget section

☐ 10. Is brief, clear, and interesting

INTRODUCTION OF THE APPLICANT ORGANIZATION

Describes the applicant organization and demonstrates its credibility

☐ 1. Clearly establishes who is applying for funding

2. Describes applicant organization

    ☐ a. mission or vision

    ☐ b. history

    ☐ c. beneficiaries

    ☐ d. service area

    ☐ e. programs and services

    ☐ f. quantity of services

    ☐ g. networks and collaborations

    ☐ h. size of organization – annual budget, number of staff, etc.

    ☐ i. board of directors

    ☐ j. organizational structure, if this adds clarity or is requested

☐ 3. Does not describe proposed program

☐ 4. Provides evidence of accomplishment – positive change for those served by organization

    ☐ a. uses hard data – statistics and other evidence

    ☐ b. uses soft data – quotes or stories

☐ 5. Clearly establishes who is applying for funding

☐ 6. Briefly introduces partner organizations that have major roles

☐ 7. Leads logically to discussion of the problem

THE PROBLEM

Drives the planning process and serves as the basis of the request for funding

☐ 1. Focuses on problems of the beneficiaries, not the applicant organization

☐ 2. Aligns with the organization's mission and service capacity

☐ 3. Is aligned with the funder's interests

☐ 4. Documents the problem

       ☐ a. who or what is affected

       ☐ b. how are they affected

       ☐ c. the magnitude and severity of the situation

☐ 5. Clearly identifies and document the causes of the problem being described in the proposal

☐ 6. Explains the problem's significance

☐ 7. Incorporates input from those affected by the problem

    8. Is supported by a mix of data

       ☐ a. uses hard data – statistics and other evidence

       ☐ b. uses soft data – quotes or stories

☐ 9. **Does not** define the problem as the lock of the proposed method

☐ 10. **Does not** tarnish credibility of applicant organization – is not self-indicting

☐ 11. Provides a brief transition to the section on program outcomes

PROGRAM OUTCOMES
Defines how the problem will change as a result of the program

☐ 1. Defines outcomes that are specific and measurable

☐ 2. Describes who or what will change

☐ 3. Defines how many people or things will change

☐ 4. Describes the type of change that will take place

☐ 5. Defines the degree of change that will occur

☐ 6. Defines the time frame in which the change will take place

☐ 7. **Does not** describe the methods or the amount of service to be provided

☐ 8. May briefly note how the change will be documented

METHODS
Describes the activities to be conducted to achieve the desired outcomes

☐ 1. Responds to causes of the problem

☐ 2. Seems reasonable for producing program outcomes

☐ 3. Leads with an interview

☐ 4. Justifies approach – explains why methods were selected

☐ 5. Describes who will benefit – target population

☐ 6. Describes who will participate in funded activities, if different from target population

☐ 7. Describes major components of activity

☐ 8. Quantifies what the program will do – how much, how many, by when

☐ 9. Describes any collaboration

☐ 10. Refers to documentation of collaboration located in appendix

☐ 11. Describes staffing

☐ 12. Describes facilities, equipment, and supplies

☐ 13. Includes a timeline or sequence of program activities

☐ 14. Provides a back-up plan if substantial barriers are anticipated

☐ 15. Aligns with budget

EVALUATION PLAN

Presents a plan for assessing whether activities are producing the proposed results (outcome evaluation) and proceeding as planned (process evaluation)

☐ 1. Includes plans for evaluating both outcomes and process

2. Answers the following:

    ☐ a. What questions will the evaluation consider?

    ☐ b. What will be measured?

    ☐ c. What is the baseline or starting point?

    ☐ d. What information will be collected, and when?

    ☐ e. Will hard (quantitative) and soft (qualitative) data be collected?

    ☐ f. How will information be collected, and by whom?

    ☐ g. How will the information be analyzed?

☐ 3. Identifies who will conduct the evaluation and describes their qualifications

☐ 4. Describes the approach for keeping data confidential, as appropriate

☐ 5. Is culturally appropriate for those who will participate

☐ 6. Notes what reports will be produced

☐ 7. Describes how the reports will be used

☐ 8. Describes how evaluation results will contribute to program improvement

FUTURE SUPPORT

Presents a plan to secure future support if the program is to be continued

☐ 1. Describes any committed future support

☐ 2. Refers to documentation of commitments located in appendix

☐ 3. Presents specific, realistic, and credible funding approaches

    ☐ When applicable, briefly cites track record with similar funding approaches

☐ 4. Includes all resources, not just cash

☐ 5. Does not count on unsecured grant funds

BUDGET

Itemizes cash and in-kind resources necessary to operate the program. Shows how contributions from the funder, other partners, and the applicant will be allocated.

☐ 1. Follows funder's directions exactly

☐ 2. Follows applicant organization's policies and practices

☐ 3. Is consistent with the Methods section

☐ 4. Is consistent with the Evaluation Plan

☐ 5. Shows numbers consistent with the cover letter (if included) and proposal Summary

☐ 6. Includes a summary showing all revenue, in-kind resources, and expenses

☐ 7. Identifies resources, other than the requested grant, that will contribute to program operation

☐ 8. Includes matching funds, as required

☐ 9. Is based on solid estimates – quotes, price checks, or organizational experience

☐ 10. Is reasonable for operating the program described in the Methods section and Evaluation Plan

☐ 11. Includes detailed line items for all direct-expense categories, showing calculations for each line

☐ 12. Includes administrative overhead (indirect expense) whether requested or covered by other sources

☐ 13. Rationale for each budget item is clear; budget justification is included, as needed

☐ 14. Has been reviewed by OSP