

Program Planning & Proposal Writing™ Checklist

This checklist is designed to be used along with the book, *Grantsmanship: Program Planning & Proposal Writing™*, in the *Grantsmanship Training Program®*. It 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 for all proposals. Use this as a guide to get organized, as a tool to decipher a funder's requirements, or as a format for your proposal when the funder does not provide one.

When writing your proposal, don't use jargon. Always aim for clear and straightforward language.

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 applicants credibility.
- 4. Describes the problem that is compelling the applicant organization to submit a grant proposal.
- 5. Defines the measurable outcomes that the program is expected to produce.
- 6. Provides an overview of the methods to be used.
- 7. Identifies major partners if any.
- 8. Specifies the requested funding period.
- 9. Includes budget synopsis stating:
 - a. dollars requested from funder
 - b. cash and in-kind resources contributed by others, if any
 - c. total cost of the program
- 10. Is brief—one to three paragraphs, half of a page at most.
- 11. Is written last.

introduction to the applicant organization

Describes the applicant organization and demonstrates its qualifications for funding (credibility).

- 1. Clearly establishes who is applying for funding.
- 2. Describes the organization and its work:
 - a. mission or vision
 - b. history
 - c. beneficiaries
 - d. service area
 - e. programs and services
 - f. quantity of services
 - g. networking and collaboration
 - h. size of organization (budget, number of staff, etc.)
 - i. board of directors
 - j. organizational structure, if this adds clarity or is requested.
- 3. Establishes the organization's credibility.
 - a. Demonstrates the organization's expertise in the program area for which it is seeking funds.
 - b. Provides evidence of past accomplishments.
- 4. Uses hard data (statistics and other objective evidence).
- 5. Uses soft data (anecdotes, quotes, and stories).
- 6. Briefly introduces partner organizations that have major roles.
- 7. Does not stray into a description of the proposed program.
- 8. Leads logically to discussion of the problem.

the problem

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

- 1. Documents the problem:
 - a. who or what is affected
 - b. how they are affected
 - c. the magnitude and severity of the situation.
- 2. Explains the problem's significance.
- 3. Clearly identifies and documents the causes of the problem.
- 4. Aligns with the applicant organization's mission.
- 5. Focuses on problems of beneficiaries, not the applicant organization.
- 6. Documents the problem in the applicant's community.
- 7. Is supported by a mix of data:
 - a. hard data—facts, statistics, research
 - b. soft data—quotes, stories.
- 8. Incorporates input from those affected by the problem.
- 9. Scope does not exceed applicant organization's capacity.
- 10. Does not define the problem as the lack of the proposed method.
- 11. Does not identify the cause of the problem as the problem itself.
- 12. Does not tarnish credibility of applicant organization—is not self-indicting.
- 13. Provides a smooth transition to outcomes.

outcomes

Defines how the problem will change as a result of the program.

- 1. Define outcomes that are specific and measurable.
- 2. Define outcomes that are achievable and reasonable.
- 3. Describe who or what will change as a result of the program.
- 4. Specify how many will change.
- 5. Describe the type of change that will take place.
- 6. Define how much change will take place.
- 7. Define the time frame in which the change will take place.
- 8. Do not describe methods or the quantity of service to be provided by a program.
- 9. May briefly note how the change will be documented.
- 10. Are written in positive and declarative language.

methods

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

- 1. Methods chosen respond to the causes of the problem.
- 2. Methods chosen seem reasonable for producing proposed outcomes.

Methods Section

- 3. Starts with an overview.
- 4. Includes justification of approach—explains why methods were selected.
- 5. Describes who will benefit—the 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—tells how much, how many, and by when.
- 9. Describes staffing.
- 10. Describes facilities, equipment, and supplies.
- 11. Includes timeline or sequence of program activities.
- 12. Provides a back-up plan if substantial barriers are anticipated.
- 13. Aligns with budget.

If There Will Be Collaboration:

- 14. Describes plans for working with other organizations.
- 15. Refers to documentation of collaboration located in appendix.

evaluation plan

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

- 1. Presents complementary plans for evaluating outcomes and methods.
- 2. Identifies who will conduct the evaluation and describes evaluator's qualifications.
- 3. Answers "a" through "g" below for both outcome and process evaluation.

OUTCOME	PROCESS	
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- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | a. What primary questions will the evaluation address? |
| <input type="checkbox"/> | <input type="checkbox"/> | b. What will be measured? |
| <input type="checkbox"/> | <input type="checkbox"/> | c. What is the baseline, or starting point? |
| <input type="checkbox"/> | <input type="checkbox"/> | d. What information will be collected, and when? |
| <input type="checkbox"/> | <input type="checkbox"/> | e. Will hard (quantitative) and soft (qualitative) data be collected? |
| <input type="checkbox"/> | <input type="checkbox"/> | f. How will information be collected, and by whom? |
| <input type="checkbox"/> | <input type="checkbox"/> | g. How will the information be analyzed? |

- 4. Describes the approach for keeping data confidential, when applicable.
- 5. Is culturally appropriate for participants.
- 6. Indicates what reports will be produced.
- 7. Describes how the reports will be used.
- 8. Describes how evaluation results will contribute to improving the program.

future support

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

- 1. Describes specific, realistic, and credible approaches for sustaining the impact of the program after the grant ends.
- 2. When appropriate, briefly cites track record with similar approaches.
- 3. Provides a detailed description of support that is already committed.
- 4. Includes documentation of committed support in appendix.
- 5. Includes all resources, not just cash.
- 6. 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. Adheres to applicant organization's policies and practices.
- 3. Is consistent with the Methods section.
- 4. Is consistent with the Evaluation section.
- 5. Is consistent with the cover letter (if included) and the proposal Summary.
- 6. Includes a summary showing all revenue, in-kind resources, and expenses.
- 7. Itemizes resources, other than the requested grant, that will support the program (including cash and in-kind).
- 8. Shows how cash and in-kind contributions from the funder, partner organizations, the applicant, and others will be allocated.
- 9. Includes matching funds as required.
- 10. Is based on solid estimates—quotes, price checks, and organizational experience.
- 11. Is reasonable for operating the program described in the application narrative—is not too high or too low.
- 12. Includes detailed line items for all direct-expense categories, showing calculations for each.
- 13. Includes indirect expense (administrative overhead) whether requested or covered by other sources.
- 14. Rationale for each budget item is clear. A budget justification is included if needed.
- 15. Has been reviewed by an expert.
- 16. Is accurate—the numbers add up (and down and across).

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