

Step One: Project Plan Worksheet

Background	
Goals	
OUR PROJECT	
1. Populations of interest	
2. Geographic area of interest	
3. Specific, measurable outcome objectives that describe concrete changes in populations of interest	
4. Broad strategies (e.g., policy development, education, skill building)	

<p>5. Specific activities (e.g., a mass media campaign, a workshop, an event)</p>	
<p>6. Resources required</p> <p>Hint: consider space, equipment, and workload implications in addition to dollars, etc.</p>	
<p>7. Timelines</p>	
<p>8. Evaluation indicators</p>	
<p>9. Other program notes</p>	

Note to desktopper: The idea is to lie these two sheets (steps 1 and 2 worksheets) next to each other to complete the 'fit' score. The participant will complete one for their own project (worksheet 1) and one for EACH funder (worksheet 2) – so they have to be separate, but compatible. To allow enough room to fill in the information each worksheet will have to be more than one page long. That's fine as long as they can be matched together in hard copy for comparison. I left approximately the amount of room I think is needed to fill in the information on worksheet one. Please make worksheet two match, in terms of space, so that they can be laid side by side (i.e. numbers 1-9 matching).

Step Two: Prospect Assessment Worksheet

Funder Name	
Funder Address	
Contact person	
Previous history with your organization	

FUNDER INTERESTS

		Fit score 1-5 1= poor: 5=excellent	Notes
1. Populations of interest			
2. Geographic focus area			
3. Outcomes/topics of interest			
4. Strategies of interest			

5. Activities of interest			
6. Resources a. Range of grants available			
b. Restrictions on use of money (e.g. staffing, types of organizations which can qualify)			
7. Timelines a. Period of funding			
b. Proposal requirements			
c. Proposal deadline			
8. Project evaluation expectations			
9. Other administrative or project requirements (e.g., reporting, payroll capacity, financial tracking systems)			

Step Three: Management of People Connected to the Proposal Process Worksheet

Person or organization	Contact (if different from column to the left)	Role/responsibility in proposal process	Contact is aware of and satisfied with role?	Notes:
			<input type="checkbox"/>	
			<input type="checkbox"/>	
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Step Three: Proposal Work Plan Worksheet

Proposal section	Person responsible	Due date	Data gaps	Plans for how to fill data gaps
Introduction				
Project description				
Goals & objectives				
Methodology				
Staffing & Administration				
Evaluation				
Sustainability				
Other (e.g. logic model)				
Budget				
Organization Information				
Appendices				
Executive Summary				
Title Page				

Step Four: Proposal Content Checklist

Cover Letter <i>Is it...</i>	✓	Notes
...on organization letterhead?		
...a brief version of what appears in the executive summary?		
...identifying significant benefit to be gained from the project?		
...showing the fit with the funder's goals and interests?		
...showing your excitement for the project?		
... signed by the President or Chairperson of the organizations' Board of Directors?		
Title Page <i>Does it include...</i>	✓	Notes
...a project title that provides a brief indication of the focus of your proposal?		
...the name of applicant?		
...the name of agency submitted to?		
...a typed name?		
...contact information?		
...the title of authorized personnel approving submission?		
...the signature of authorized personnel approving submission?		
...the date of approval?		
...the date of submission?		

<i>Executive Summary</i>	<i>Does it include...</i>	✓	<i>Notes</i>
	...a brief statement of the problem or need?		
	...a short description of the project, including what will take place and what outcomes are expected?		
	...an explanation of the amount of grant money required for the project?		
	...sustainability expectations - your plans for continuing the project in the future?		
	... a brief statement of the name, history, purpose and activities of your agency, emphasizing its capacity to carry out this project?		

Introduction	Does it include...	✓	Notes
	...a short summary of the problem in terms of the needs of humans and other life?		
	...a brief summary of evidence and examples showing the significance of the problem, and demonstrating a precise understanding?		
	...an explanation about why this problem should be of special interest to the funder that includes links between your project idea and funder's priorities?		
	...a brief overview of what you plan to do?		
	...highlights about the unique or innovative aspects to your proposal?		
	...highlights of relevant recent experience?		
	...highlights about what makes you unique?		
	...links between the project and your organizational goals?		
Project Description		✓	Notes
Goal and outcome objectives	Does it include...		
	...separate goals and objectives?		
	...objectives that are specific (i.e. that identify an audience of interest, and the specific change that you plan on effecting in that audience)?		
	...objectives that are measurable?		
	...objectives that are attainable?		
	...objectives that are realistic?		
	...objectives that are time-limited?		
	...a brief explanation of why these objectives were selected?		
	...a brief explanation of why these objectives are of special interest to the funder?		

...indicators that will clearly show whether the objectives were achieved?		
...a summary of evidence showing that your project will result in achieving the objectives (with details in the Appendix)?		
...a realistic assessment of the available resources for achieving your objectives?		
...details about when the objectives will be met?		
Methodology Does it include...	✓	Notes
...a detailed description of what activities will occur from the time the project begins until it is complete?		
...links between methods and outcome objectives?		
...an explanation of the interrelationships among project activities?		
...a description of why particular methods were chosen?		
...evidence and examples of past experience that justify your choices of methods?		
...notes about who will carry out each project task?		
...chronological presentation of tasks, with clear deadlines attached to critical junctures?		
Staffing and Administration Does it include...	✓	Notes
...names of people who will undertake the work?		
...qualifications of people who will undertake the work?		
...details of the specific assignments each person will undertake?		
...details about the time each person will devote to the project?		
Evaluation Does it include...	✓	Notes
...an explanation about who the evaluation is intended to serve, and how the results will assist them?		
...links between evaluation and objectives ?		

...a description of the type of evaluation that will be used?		
...explanation about whether data collection strategies will be qualitative, quantitative, or a combination?		
...a description of evaluation tool use or development?		
...justification (e.g., literature, experience, needs of the people the evaluation is intended to influence or assist) for evaluation types, methods and tools?		
Sustainability Does it include...	✓	Notes
<p>...evidence that the project fits into one of the following categories:</p> <ul style="list-style-type: none"> ❑ The project meets a finite need that will be met within the clear start and end dates of the grant. ❑ The project builds capacity, such that your organization, or others will be able to continue the work, without outside funding. ❑ The project will increase the likelihood that other funders will provide support. 		
Budget Does it include...	✓	Notes
Program Income		
Direct costs		
...personnel costs including salaries, wages for temporary staff, fringe benefits?		
...travel?		
...consultants and contracts (fees for service)?		
...services, supplies, and materials such as advertising, promotion, postage, printing, program materials, supplies, bank/payroll charges, professional fees (audit and legal)?		
...equipment purchase and rental?		
Indirect Costs	✓	Notes
...overhead and administration?		
...facilities and utilities, including telecommunications?		

...other costs such as repair and maintenance charges for rental equipment, meeting costs, subscription dues, temporary help, insurance, bonding costs?		
Organization Information <i>Does it include...</i>	✓	Notes
...mission?		
...relationship between mission and this project?		
...audience served – characteristics and size?		
...organization's structure?		
...activities, programs, and special expertise?		
...board information – size, method of recruitment, level of participation, members (appendix)?		
...role of volunteers?		
...staff - numbers of full and part-time staff, and their levels of expertise?		
...specific relevant experience?		
...when your organization came into existence ?		
Appendices <i>Do they include...</i>	✓	Notes
...strong letters of support and commitment?		
...assurances of cooperation provided in instances of inter-agency support?		
...resumes for all key project personnel and consultants?		

Step Five: Producing and Packaging Checklist

Technical writing skills Have you....	✓	Notes
...used ideas consistently, making no contradictions within proposal?		
...used words consistently, always defining terms in the same way?		
...applied formatting consistently (e.g., italics, bold, quotation marks, capital letters, headings, references, footnotes, etc.)?		
...used sentences that are clear and concise?		
...built a logical flow where each point builds on the one that came previously and concepts are not assumed to be 'common sense'?		
...minimized loosely relevant information, staying on topic and ensuring that all supporting material is linked to your proposal?		
...used complete sentences, where each subject has a verb?		
...properly used of pronouns where referent is clear?		
...correctly used grammar, as identified by a skilled proofreader?		
Visual presentation Do you have...	✓	
...a font style and size that make your proposal easy to read?		
...headings and subheadings that reveal the main ideas and the organization of your proposal to the reader?		
...page numbers?		
...list format as many places as are appropriate?		