

Proposal Checklist and Evaluation Form

By Norton J. Kiritz

This form, designed for use in the Grantsmanship Center Training Programs, follows the format of our "Program Planning and Proposal Writing" booklet. It can assist the proposal writer in the preparation and improvement of a complete proposal. It is also an aid to

the proposal evaluator in assessing the merit of a grant application.

Yes/No answers indicate whether or not an item is included. The numerical rating (1 is poorest, 5 is best) is for use where applicable.

Proposal Components and Necessary Items:

Summary: Clearly and concisely summarizes the request	Yes	No	1-5	Comments on Summary	
1. Appears at the beginning of the proposal					
2. Identifies the grant applicant					
3. Includes at least one sentence on credibility					
4. Includes at least one sentence on problem					
5. Includes at least one sentence on objectives					
6. Includes at least one sentence on methods					
7. Includes total cost, funds already obtained and amount requested in this proposal					
8. Is brief					
9. Is clear					
10. Is interesting					

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I. Introduction: Describes the applicant agency and its qualifications for funding (credibility)	Yes	No	1-5	Comments on Introduction	
1. Clearly establishes who is applying for funds					
2. Describes applicant agency purposes and goals					
3. Describes applicant's programs and activities					
4. Describes applicant's clients or constituents					
5. Provides evidence of the applicant's accomplishments					
6. Offers statistics in support of accomplishments					
7. Offers quotes/endorsements in support of accomplishments					
8. Supports qualifications in area of activity in which funds are sought (e.g., research, training)					
9. Leads logically to the problem statement					
10. Is as brief as possible					
11. Is interesting					
12. Is free of jargon					

II. Problem Statement or Needs Assessment	Yes	No	1-5	Comments on Problem Statement/ Needs Assessment	
1. Relates to purposes and goals of applicant agency					
2. Is of reasonable dimensions—not trying to solve all the problems of the world					
3. Is supported by statistical evidence					
4. Is supported by statements from authorities					
5. Is stated in terms of clients' needs and problems—not the applicant's					
6. Is developed with input from clients and beneficiaries					
7. Is not the "lack of a program," unless the program always works					
8. Makes no unsupported assumptions					
9. Is free of jargon					
10. Is interesting to read					
11. Is as brief as possible					
12. Makes a compelling case					

III. Program Objectives: Describes the outcomes of the grant in measurable terms	Yes	No	1-5	Comments on Program Objectives
1. At least one objective for each problem or need committed to in problem statement				
2. Objectives are outcomes				
3. Objectives are not methods				
4. Describes the population that will benefit				
5. States the time by which objectives will be accomplished				
6. Objectives are measurable, if at all possible				

IV. Methods: Describes the activities to be conducted to achieve the desired objectives	Yes	No	1-5	Comments on Methods
1. Flows naturally from problems and objectives				
2. Clearly describes program activities				
3. States reasons for the selection of activities				
4. Describes sequence of activities				
5. Describes staffing of program				
6. Describes clients and client selection				
7. Presents a reasonable scope of activities that can be conducted within the time and resources of the program				

V. Evaluation: Presents a plan for determining the degree to which objectives are met and methods are followed	Yes	No	1-5	Comments on Evaluation
1. Presents a plan for evaluating accomplishment of objectives				
2. Presents a plan for evaluating and modifying methods over the course of the program				
3. Tells who will be doing the evaluation and how they were chosen				
4. Clearly states criteria of success				
5. Describes how data will be gathered				
6. Explains any test instruments or questionnaires to be used				
7. Describes the process of data analysis				
8. Describes any evaluation reports to be produced				

VI. Future Funding: Describes a plan for continuation beyond the grant and/or the availability of other resources necessary to implement the grant	Yes	No	1-5	Comments on Future Funding
1. Presents a specific plan to obtain future funding if program is to be continued				
2. Describes how maintenance and future program costs will be obtained (if a construction grant)				
3. Describes how other funds will be obtained, if necessary to implement the grant				
4. Has minimal reliance on future grant support				
5. Is accompanied by letters of commitment, if necessary				

Budget: Clearly delineates costs to be met by the funding source and those provided by other parties	Yes	No	1-5	Comments on Budget
1. Tells the same story as the proposal narrative				
2. Is detailed in all aspects				
3. Projects costs that will be incurred at the time of the program, if different from the time of proposal writing				
3. Contains no unexplained amounts for miscellaneous or contingency				
4. Includes all items asked of the funding source				
5. Includes all items paid for by other sources				
6. Includes all volunteers				
7. Details fringe benefits, separate from salaries				
8. Includes all consultants				
9. Separately details all non-personnel costs				
10. Includes indirect costs where appropriate				
11. Is sufficient to perform the tasks described in the narrative				

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