**Proposal Checklist**

**and Evaluation Form**

**By Norton J. Kiritz**

This form, designed for use in the Grantsmanship the proposal evaluator in assessing the merit

Center Training Programs, follows the format of our of a grant application.

“Program Planning and Proposal Writing” booklet. Yes/No answers indicate whether or not an

It can assist the proposal writer in the preparation and item is included. The numerical rating (1 is

improvement of a complete proposal. It is also an aid to 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 the proposal |  |  |  |
| 8. Is brief |  |  |  |
| 9. Is clear |  |  |  |
| 10. Is interesting |  |  |  |

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

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| **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 |  |  |  |

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| **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 |  |  |  |

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| **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 |  |  |  |

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| **VI. Future Funding:** Describing 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 |  |  |  |

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| **Budget:** Clearly delineates costs to be met by the funding source and those provided by other parties | **Yes** | **No** | **1-5** | **Comments on**  **Summary** |
| 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 |  |  |  |
| 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 |  |  |  |