Guide to the Bid or No Bid Funding Opportunity Checklist

A strong pipeline depends as much on the proposals you decline as on the ones you write. This guide explains how to run the R01 checklist well: who to bring into the room, how to answer each part honestly, and how to turn a score into a clear decision with owners and dates.

USE WITH	TIME NEEDED	RESULT
R01 Bid or No Bid Funding Opportunity Checklist	30 minutes to read the call, then a 45 to 60 minute meeting	A recorded Bid, Conditional Bid, or No Bid decision with owners

What this guide covers

- Why a structured bid or no bid decision matters, and when to use one
- Who should take part and what each person brings
- A walkthrough of every part of the checklist: gates, criteria, weights, bands, and the decision record
- A worked example, common mistakes, and good-practice tips
- How the checklist links to the other four resources in the series

Purpose and when to use it

Writing a competitive proposal takes real time from your most senior people. When an organization says yes to every call, quality drops, staff burn out, and the strongest opportunities get the same rushed attention as the weakest. A bid or no bid review protects that time. It replaces a quick "this looks perfect for us" with a short, shared, evidence-based judgment.

The checklist follows the structure that bid and proposal teams use widely: knock-out questions first, then a weighted score turned into a percentage, then three decision bands. The structure matters more than the exact numbers. It makes your reasoning visible, so that a decision can be explained to a board, revisited when facts change, and compared across opportunities.

Use it when

- A new call for proposals, request for applications, or tender is released
- A funder invites you to submit a concept note or letter of inquiry
- A partner asks you to join a consortium bid
- You are deciding whether to renew an application to a funder you have applied to before

You may not need it when

- A long-standing funder invites a renewal on terms you already know well. A shorter check of the gates may be enough.
- The application is a short form for a small award. Use the gates and your judgment, and keep a note of the decision.

Who should be involved

Keep the group small: three to five people who can speak for program delivery, finance, and the funder relationship. One person should own the decision.

Role	What they bring to the decision
Decision owner (often the executive director)	Final say, strategic judgment, and authority to commit staff time and any match
Development or grants lead	Knowledge of the call, the funder, the competition, and the writing workload
Program lead	Whether the work is deliverable, the evidence behind it, and the capacity of the team
Finance lead	Budget limits, match, indirect cost rules, cash flow, and compliance demands
Partner representative (if a joint bid)	Partner capacity, approvals needed, and their own timelines

Running the meeting

Before the meeting

- Circulate the call, its annexes, and a one-page summary at least a day ahead.
- Ask the finance lead to check match, cost share, and indirect cost rules.
- Ask the program lead to list the evidence you could use.
- Print or share a blank copy of R01 for each person.

Suggested agenda

Time	Item	Lead
5 minutes	Summary of the call and its key rules	Grants lead
10 minutes	Must-pass gates, answered together	Decision owner
10 minutes	Private scoring of the eight criteria	Everyone
20 minutes	Compare scores, discuss gaps of 2 or more points, and agree final scores	Grants lead
10 minutes	Percentage, band, minimum scores, decision, conditions, and owners	Decision owner

After the meeting

- Send the decision record to everyone within a day.
- For a Bid, name the proposal lead and schedule the R02 session.
- For a Conditional Bid, put the review date in the calendar.
- For a No Bid, log the reasons in your pipeline record.

Walkthrough: every part of the checklist

Before the meeting, the grants lead should read the full call and circulate a one-page summary: purpose, eligibility, award range, match, deadline, scoring criteria, and reporting terms. Everyone then works from the same facts.

Part of the checklist	What to do	Tips
Step 1: Must-pass gates	Answer the five gates Yes or No: eligibility, ability to submit on time, mission fit, match, and ability to meet the terms if you win.	Treat "not sure" as No until someone confirms it. A single No ends the review, which saves everyone time.
Step 2: Scoring guide	Agree the meaning of 0 to 3 before anyone scores. Read the four definitions aloud.	When two scores seem equally true, choose the lower one. Optimism is the most common bias in these meetings.
Criterion 1: Mission fit	Ask whether the funder wants what you already do well.	If you need to invent a new program to fit, that is a 1 at best.
Criterion 2: Eligibility detail	Check the finer rules beyond the gates: prior awards, partner requirements, and registrations.	Look for these in annexes and frequently asked questions, not only the main call.
Criterion 3: Capacity	Consider writing capacity now and delivery capacity later.	List who will write, review, and approve, and check their leave and other deadlines.
Criterion 4: Evidence	Rate the data you can show on need and on why your approach should work.	Internal monitoring data counts. Say honestly whether it has been reviewed externally.
Criterion 5: Funding and effort	Weigh the award size against the effort of applying, delivering, and reporting, within the cost rules.	A small award with heavy reporting can cost more than it brings in.
Criterion 6: Timeline	Count backward from the deadline, including reviews, partner letters, and sign-off.	Board approvals and partner signatures are the usual bottlenecks.
Criterion 7: Competition	Estimate how strong your case is given the number of awards.	If you have no information, score 1 and note it as an assumption.
Criterion 8: Relationship	Rate how well you know the funder's priorities first-hand.	An information session counts for something; a past grant counts for more.
Weights (optional)	Give each criterion a weight from 1 to 3.	Set weights once for all opportunities, not afresh for each call. Changing them to rescue a favorite defeats the purpose.
Step 4: Decision bands	Convert the total to a percentage and read off the band: 70 percent or more Bid, 50 to 69 percent Conditional Bid, below 50 percent No Bid.	Then apply the minimum scores. Mission fit and capacity need at least 2 for a Bid, and any 0 means No Bid unless it can be fixed in time.
Step 5: Decision record	Record the funder, deadline, award range, percentage, decision, owner, conditions, and date.	For a Conditional Bid, set a date to decide again and say what result turns it into No Bid.

Working out the percentage

Multiply each score by its weight and add the results. Divide by the maximum possible, which is 3 times the sum of the weights, and multiply by 100. With every weight at 1, the maximum is 24, so 17 or more is a Bid, 12 to 16 is a Conditional Bid, and 11 or less is a No Bid.

WORKED MINI EXAMPLE

Brightwater Reading Trust decides on a literacy grant

All names, places, and figures in this example are invented for illustration.

Brightwater Reading Trust runs after-school reading clubs for children aged 8 to 11. A foundation opened a call for community literacy programs with a five-week deadline. The executive director, the grants lead, the program lead, and the finance lead met for 50 minutes.

Gates. All five were Yes. The finance lead confirmed that a 20 percent match was possible, but only half was in hand, so she flagged it for scoring.

Weights. The team had agreed last year to keep every weight at 1. They did not change them for this call.

Criterion	Score	Why the team chose it
Mission fit	3	The call describes the program they already run.
Eligibility detail	3	No current award from this funder; region and status eligible.
Capacity	2	The grants lead is away for two of the five weeks, so the program lead will cover drafting.
Evidence	2	Two years of pilot data, with no external review.
Funding and effort	2	The award covers the program; half the match is unconfirmed.
Timeline	1	Partner school boards meet in four weeks, close to the deadline.
Competition	1	Few awards and no information on applicant numbers.
Relationship	1	One webinar, no direct contact.

Result. 15 of 24, or 63 percent: Conditional Bid. Mission fit and capacity both met the minimum of 2, and there were no zeros. The team set three conditions with owners and agreed to meet again at the end of week two. If the match or the school letters were not confirmed by then, the decision would become No Bid.

What happened next. The second donor confirmed the match in week two, and one principal could sign before the board met. The team moved to Bid and started the R02 worksheet the same day.

Common mistakes and how to avoid them

Mistake	Why it matters	How to avoid it
Scoring before reading the full call	Key rules often sit in annexes, and a missed rule can make all the work wasted.	Circulate a one-page summary of the call before the meeting.
Skipping the gates because the fit looks perfect	A strong score cannot fix an eligibility failure.	Always answer the gates first, and stop at the first No.
Letting the most senior person score first	Others anchor on that score and stop raising concerns.	Ask everyone to write their scores privately, then compare and discuss gaps.
Changing weights to suit one call	The tool stops being comparable across opportunities.	Set weights once a year and keep them fixed.
Treating Conditional Bid as Bid	Conditions are forgotten and the team writes anyway.	Give every condition an owner and a date, and decide again on that date.

Mistake	Why it matters	How to avoid it
Not recording No Bid decisions	The same weak call is reconsidered next year from scratch.	Record why, and what would need to change.

Good-practice tips

- **Keep a pipeline log.** Record each decision and its outcome. After a year, compare your scores with your results and adjust the bands if they are too generous or too strict.
- **Check the funding rules early.** Match, cost sharing, and indirect cost limits differ by funder. For US federal awards, cost sharing is governed by 2 CFR 200.306; other funders publish their own rules.
- **Make capacity concrete.** Name the people who will write, review, and approve, and check their calendars before you score capacity.
- **Be honest about competition.** If you cannot estimate it, record that as an assumption rather than guessing high.
- **Contact the funder only as allowed.** Some calls set rules on contact during the open period. Follow them.

Frequently asked questions

Can we change the 70 and 50 percent bands? Yes. They are conservative starting points, not a rule. Change them once, for a good reason such as a year of pipeline results, and apply the new bands to every opportunity.

What if a criterion does not apply? Leave it out and reduce the maximum possible score by 3 times its weight. Note why in the decision record.

Should we score a consortium bid differently? Use the same checklist, but score capacity and timeline for the whole consortium, and add the lead partner's approval process to the timeline.

How long should the meeting take? With a one-page summary of the call circulated in advance, 45 to 60 minutes is usually enough. If it runs much longer, the facts are probably not yet clear.

How it links to the other resources

Resource	How it connects
R02 Pre-Proposal Planning Worksheet	After a Bid, the worksheet turns the evidence and gaps you found here into answers for the proposal.
R03 Logic Model and Theory of Change	Your mission fit score rests on a clear program logic. Build or update it next.
R04 Proposal-Stage MEL Starter	If the call scores MEL or requires an evaluation, note it under capacity and effort, then plan it with R04.
R05 Proposal Budget Alignment Checklist	The match and cost rules you checked here become checks in R05 before you submit.

Want a second pair of eyes before you submit?

Edit Right Advisors is a grant writing and advisory firm. We help nonprofits and NGOs win funding and grow their impact. We can screen an opportunity with you, shape the program logic, build your MEL (monitoring, evaluation, and learning) plan, or review a full draft so that every part holds together.

FREE 30-MINUTE CONSULTATION

Book a free 30-minute consultation: calendly.com/editrightadvisors

The full series: five templates, each with a companion guide

RO1	Bid or No Bid Funding Opportunity Checklist (guide: G01)
RO2	Pre-Proposal Planning Worksheet (guide: G02)
RO3	Logic Model and Theory of Change Template (guide: G03)
RO4	Proposal-Stage MEL Starter Template (guide: G04)
RO5	Proposal Budget Alignment Checklist (guide: G05)

Sources and credits

Companion guide to the Edit Right Advisors R01 checklist. The structure of gates, weighted scores, and three decision bands reflects common bid and no-bid practice. The 70 and 50 percent bands are Edit Right conventions; no standards body sets them.

Cost sharing example: 2 CFR 200.306, Cost sharing (eCFR): https://www.ecfr.gov/current/title-2/section-200.306 (accessed October 27, 2026).

All text, tables, and the example are original Edit Right Advisors material. Brightwater Reading Trust is invented.

© 2026 Edit Right Advisors. Free to use and share with attribution; not for resale (CC BY-NC 4.0).

Suggested credit when you share or adapt this resource: Edit Right Advisors (2026). Guide to the Bid or No Bid Funding Opportunity Checklist. editright.io. Licensed under CC BY-NC 4.0: https://creativecommons.org/licenses/by-nc/4.0/