Guide to the Pre-Proposal Planning Worksheet

Most weak proposals are not badly written. They are written too early, before the team agrees on the problem, the people, and the plan. This guide explains how to use the eight questions in R02 to reach that agreement, and how each answer feeds a standard proposal section.

USE WITH	TIME NEEDED	RESULT
R02 Pre-Proposal Planning Worksheet	One working session of 60 to 90 minutes, plus follow-up	Agreed answers, each marked Confirmed, Partly confirmed, or Assumption

What this guide covers

- Why planning before drafting saves time and improves quality
- Who should take part in the session
- A walkthrough of each of the eight questions, the status scale, and the readiness check
- A worked example, common mistakes, and good-practice tips
- How the worksheet links to the other four resources

Purpose and when to use it

The worksheet asks eight plain questions about the problem, the people affected, the evidence, the approach, the risks, the roles, the expected change, and how you will know. Answering them together gives the writer a settled brief and gives reviewers a proposal in which every section tells the same story.

The questions cover the same ground as the first steps of widely used evaluation frameworks, which begin by understanding the context and describing the program. The CDC Program Evaluation Framework, 2024, for example, starts with assessing context and describing the program, and the OECD DAC relevance and coherence criteria ask whether an intervention responds to real needs and fits with other work in the same setting.

Use it when

- You have made a Bid or Conditional Bid decision with R01
- You are preparing a concept note or letter of inquiry
- You are redesigning a program before seeking new funding

You may not need all of it when

- You are renewing a well-documented program with no changes. Review your earlier answers and update only what has changed.

Who should be involved

Role	What they bring
Program lead	How the work runs day to day, what has worked, and what has not
Someone close to participants	Frontline staff, a community representative, or a participant voice, so that the problem is described as people experience it
Finance lead	Early sight of what the plan will cost, so the budget does not surprise anyone later
MEL lead or data holder	What data already exists and what it shows
Proposal writer	Questions a reviewer will ask, and the funder's language and priorities
Partner representative	Partner roles, approvals, and commitments, if the work is shared

Running the session

Before the session

- Share the bid or no bid record from R01 and the call summary.
- Ask the MEL lead to bring existing data on need, attendance, and results.
- Ask partners which approvals they need and how long they take.
- Send the eight questions a day ahead, so people come prepared.

Suggested agenda

Time	Item	Lead
10 minutes	Purpose of the session and the R01 decision	Proposal writer
30 minutes	Questions 1 to 4: problem, people, evidence, and approach	Program lead
20 minutes	Questions 5 to 8: risks, roles, change, and measurement	Program lead and MEL lead
15 minutes	Status for each answer, actions, owners, and the readiness check	Proposal writer

After the session

- Type up the answers and statuses the same day and share them.
- Chase each action by its date, and update the statuses.
- When the readiness check is met, move to the logic model in R03.

Walkthrough: the eight questions

Question and proposal section it feeds	What a good answer includes	Tips
1. What problem are we solving? *Problem statement or statement of need*	The specific condition, for whom, where, and its scale, with a source for each figure.	Describe a condition, not a missing service. "Children read below grade level" is a problem; "there are no clubs" is a solution in disguise.
2. Who is most affected? *Target population and inclusion analysis*	Which groups feel the problem most, with differences by gender, age, disability, location, and income.	Say how you know. If you have not heard from these groups directly, mark the answer as an Assumption.

Question and proposal section it feeds	What a good answer includes	Tips
3. What evidence do we actually have? *Evidence base and needs assessment*	Your own data, partner data, and published research, with dates and sources.	Separate what you measured from what you believe. Both are useful, but reviewers must be able to tell them apart.
4. Why do we think this approach will help? *Approach and theory of change*	The logic from activities to change, and the evidence or experience behind each step.	If you cannot explain a step in one sentence, it is not ready for the logic model.
5. What could get in the way? *Risks and assumptions*	Context, delivery, partner, funding, and safety risks, with a likelihood and a response.	Include risks to the people you serve, not only risks to the project.
6. Who needs to be involved, and does everyone agree on their part? *Partnerships, management, and governance*	Partners, local authorities, community groups, and internal teams, with their roles and status of agreement.	A role is not agreed until the partner says so in writing.
7. What will change if the program works? *Expected results (outcomes)*	Specific changes for the specific people, by when.	Write changes in people or conditions, not activities completed.
8. How will we know? *MEL plan and indicators*	A few signs of progress, where the data comes from, who collects it, and when.	Keep it short here. R04 turns this answer into an indicator table.

The status scale

After each answer, tick one status. **Confirmed** means you have evidence or written agreement. **Partly confirmed** means some evidence, but gaps remain. **Assumption** means you believe it but cannot yet show it. For every answer that is not Confirmed, write an action and an owner on the line provided.

The readiness check

Start drafting when questions 1, 2, 3, and 6 are at least Partly confirmed. These four carry the most risk: if the problem, the people, the evidence, or the partners are wrong, no amount of writing will fix the proposal.

WORKED MINI EXAMPLE

Brightwater Reading Trust plans its reading clubs proposal

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

After its Bid decision, Brightwater brought together the program lead, two volunteer club coordinators, the finance lead, the MEL officer, and the grants lead for 80 minutes.

Question	How the team answered and what it decided
1. Problem	Many children aged 8 to 11 in two partner schools read below grade level. Marked Partly confirmed: the schools hold the assessment data and agreed to share a summary by week one.
2. Who is most affected	The coordinators said children who speak another language at home attend less. This was an Assumption, so the MEL officer will check attendance records by home language.
3. Evidence	Two years of pilot attendance and fluency scores. Confirmed for the pilot clubs only.
6. Partners	Both schools support the plan, but letters depend on board approval. Partly confirmed; the program lead owns the follow-up.

Questions 1, 2, 3, and 6 were at least Partly confirmed after the attendance check, so drafting began. The question 2 finding later shaped one learning question in the MEL table.

Common mistakes and how to avoid them

Mistake	Why it matters	How to avoid it
Answering alone at a desk	You miss what frontline staff and participants know.	Hold one session with the roles listed above.
Marking everything Confirmed	Reviewers spot claims without evidence quickly.	Ask "how do we know?" for each answer before ticking a status.
Writing the solution as the problem	The theory of change becomes circular.	Describe the condition in people's lives, then the program as the response.
Treating partners' support as agreement	Letters arrive late or describe a smaller role.	Confirm roles in writing early, and check the wording matches your narrative.
Leaving question 8 for later	MEL costs are missed in the budget.	Note at least one sign of progress and its data source now.

Good-practice tips

- **Listen to the people affected.** Engaging the people the program serves early is a recurring theme in the CDC 2024 framework, and it improves the quality of every later answer.
- **Check relevance and coherence.** Ask whether the plan responds to needs the affected groups themselves would name, and whether it fits with other programs in the same place. These are two of the six OECD DAC evaluation criteria.
- **Keep the language plain.** Write answers as you would explain them to a board member. The writer can adapt them to the funder's terms later.
- **Date the worksheet.** Save each version, so you can show how the plan changed and why.

Frequently asked questions

Can we answer the questions in a different order? Yes, but answer question 1 first. Every other answer depends on a clear problem.

What if the funder's template uses different headings? Keep your answers and map them to the funder's headings. The section named under each question shows where the content usually belongs.

How long should each answer be? A short paragraph or a few bullets. The worksheet is a brief for the writer, not the proposal itself.

What if we cannot reach Partly confirmed on question 6 in time? Treat it as a condition from R01. If partners cannot confirm their roles before the deadline, revisit the bid or no bid decision.

How it links to the other resources

Resource	How it connects
R01 Bid or No Bid Funding Opportunity Checklist	Run R01 first. Its evidence and capacity notes give you a head start on questions 3 and 6.
R03 Logic Model and Theory of Change	Questions 1, 4, 5, and 7 become the problem statement, the logic, the assumptions, and the outcomes.
R04 Proposal-Stage MEL Starter	Question 8 becomes your indicator table and learning questions.
R05 Proposal Budget Alignment Checklist	The roles in question 6 and the data in question 8 must each have a budget line.

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 R02 worksheet. The eight questions are by Atiq Rehman, Founder of Edit Right Advisors.

Kidder DP, Fierro LA, Luna E, et al. CDC Program Evaluation Framework, 2024. MMWR Recommendations and Reports 2024;73(6): https://www.cdc.gov/mmwr/volumes/73/rr/rr7306a1.htm.

OECD, Evaluation Criteria: https://www.oecd.org/en/topics/sub-issues/development-co-operation-evaluation-and-effectiveness/evaluation-criteria.html. Both 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 Pre-Proposal Planning Worksheet. editright.io. Licensed under CC BY-NC 4.0: https://creativecommons.org/licenses/by-nc/4.0/