Bid or No Bid Funding Opportunity Checklist

Not every open call deserves a proposal. This checklist helps your team decide, in one focused meeting, whether an opportunity is worth the time and effort before anyone starts writing.

WHO IT IS FOR	WHEN TO USE IT	WHAT YOU NEED
Executive directors, development leads, and program managers	As soon as a call is released, and before you commit staff time	The full call, your budget picture, and your program lead

How to use this checklist

1. Read the whole call first: purpose, eligibility rules, scoring criteria, budget rules, and deadline.
2. Answer the five must-pass gates. A single "No" means No Bid, whatever the score.
3. Score each of the eight criteria from 0 to 3 using the scoring guide. When in doubt, choose the lower score.
4. Optional: give each criterion a weight from 1 to 3 to reflect what matters most to your organization. Keep the same weights for every opportunity.
5. Convert the total to a percentage, apply the decision bands and minimum scores, and record the decision, the owner, and the date.

Step 1: Must-pass gates

If any answer is No, stop here: the decision is No Bid	Yes	No
We meet every stated eligibility rule (legal status, location, size, and registration).	☐	☐
We can submit a complete, approved proposal before the deadline.	☐	☐
The funded work fits our mission without changing what we do or who we serve.	☐	☐
We can meet any required match or cost share.	☐	☐
We can meet the reporting, audit, and compliance terms if we win.	☐	☐

Step 2: Scoring guide

Score	Rating	What it means
3	Strong	Clear and documented. No open questions.
2	Adequate	Mostly in place. Small gaps we can close well before the deadline.
1	Weak	Significant gaps or unanswered questions that put quality at risk.
0	Not met	Missing, or a clear mismatch with the call.

Step 3: Score the eight criteria

Criterion	Guiding question	Score (0 to 3)	Weight (1 to 3)	Score times weight	Notes and evidence
1. Mission fit	Does the funder want to pay for what we already do well, or would we be bending our work to fit the money?				
2. Eligibility detail	Beyond the gates, do we meet the finer conditions, such as prior funding limits, partnership requirements, or required registrations?				
3. Capacity	Do we have the people, systems, and time to write a strong proposal now and deliver the program later?				
4. Evidence	Can we show credible data on the need and on why our approach should work?				
5. Funding and effort	Is the award worth the effort of applying and reporting, and can we deliver within the award range and cost rules?				
6. Timeline	Is there time to draft, review, gather partner inputs, and get internal sign-off before the deadline?				
7. Competition	How strong is our case compared with likely applicants, given the number of awards on offer?				
8. Relationship	Do we understand the funder's priorities first-hand, through past contact, past grants, or an information session?				
Total	**Add the last column. Maximum possible = 3 times the sum of the weights (24 if every weight is 1).**				

Step 4: Decision bands and minimum scores

Percentage score = total (score times weight) divided by the maximum possible, times 100.

Percentage	Equal weights (out of 24)	Decision	What happens next
70 percent or more	17 to 24	**Bid**	Name a proposal lead, set internal deadlines, and start the outline.
50 to 69 percent	12 to 16	**Conditional Bid**	List each gap with an owner and a fix date. Proceed only if every gap can be closed in time.
Below 50 percent	0 to 11	**No Bid**	Record why. Note what would need to change for a future round.

Minimum scores: mission fit and capacity need at least 2 for a Bid; with a 1 in either, the best result is Conditional Bid. A 0 on any criterion means No Bid unless the gap can be closed before the deadline by a named owner.

Why these bands

The checklist follows the usual structure of a bid and no-bid decision: knock-out questions answered first, a weighted score turned into a percentage so that different opportunities can be compared, and three bands for proceed, review, and decline. No standards body sets the cut-offs. Seventy and 50 percent are conservative starting points. Keep them the same across opportunities, and review them once a year against your success rate.

Step 5: Decision record

Opportunity and funder		**Deadline**	
Award range		**Percentage score**	
Decision	☐ Bid ☐ Conditional Bid ☐ No Bid	**Decision owner**	
Conditions and owners		**Date decided**	

WORKED MINI EXAMPLE

Brightwater Reading Trust screens 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 has opened a call for community literacy programs with a five-week deadline. The team passed all five gates, kept every weight at 1, and scored the criteria.

Criterion	Score	Evidence the team recorded
Mission fit	3	The call funds out-of-school reading support for primary-age children, which is our core program.
Eligibility detail	3	We are a registered nonprofit in an eligible region, with no current award from this funder.
Capacity	2	The program team is in place, but our grants lead is on leave for two of the five weeks.
Evidence	2	Two years of attendance records and reading assessments from our pilot clubs. No external evaluation yet.
Funding and effort	2	The program fits within the award ceiling. A 20 percent match is required; half is confirmed.
Timeline	1	Two partner schools need board approval for letters of commitment, and their boards meet in four weeks.
Competition	1	Open call with few awards. We have no information on how many organizations usually apply.
Relationship	1	We attended one webinar. No direct contact with program staff.
Total	**15 of 24**	**63 percent: Conditional Bid.** Mission fit and capacity both meet the minimum score of 2.

Decision: Conditional Bid

- The executive director will confirm the remaining match with a second donor by the end of week two.
- The program lead will ask both schools this week whether their principals can sign letters before the board meets.
- The development officer will send one short, specific question to the program officer, if the call allows contact.
- The team will meet again at the end of week two. If the match or the letters are not confirmed, the decision becomes No Bid.

Notice what the score did: it turned a vague "this looks perfect for us" into three concrete tasks with owners and a date to decide again.

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.

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RO4	Proposal-Stage MEL Starter Template (guide: G04)
RO5	Proposal Budget Alignment Checklist (guide: G05)

Sources and credits

This checklist is an original Edit Right Advisors tool that follows the common bid and no-bid structure of gates, weighted scores, and decision bands. The thresholds are Edit Right conventions, not a published standard.

Cost sharing rules differ by funder. One example is US federal awards: 2 CFR 200.306, Cost sharing, https://www.ecfr.gov/current/title-2/section-200.306 (accessed October 27, 2026).

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