Pre-Proposal Planning Worksheet

Strong proposals start with honest answers to eight questions. Work through them with your program, finance, and MEL (monitoring, evaluation, and learning) colleagues before anyone drafts, so the narrative, budget, and results plan tell the same story.

WHO IT IS FOR	WHEN TO USE IT	TIME NEEDED
Program leads, development staff, and anyone shaping a new proposal	After a Bid decision, before the first draft	One working session of 60 to 90 minutes, plus follow-up

How to use this worksheet

1. Bring the right people into the room: the program lead, someone from finance, whoever will run MEL, and a partner if one will share delivery.
2. Answer each question in plain words. Short bullet points are fine. Write what you know, not what the funder wants to hear.
3. Mark the status of each answer: **Confirmed** (we have proof), **Partly confirmed** (some proof, some gaps), or **Assumption** (we believe it but cannot yet show it).
4. Turn every Assumption into an action with an owner and a date.
5. Keep the completed worksheet. Each answer feeds a standard proposal section, named under each question, and the whole sheet becomes the backbone of your concept note, logic model, and MEL plan.

> **Ready to draft?**
> A useful rule of thumb: start drafting when questions 1, 2, 3, and 6 are at least Partly confirmed and every Assumption has an owner. If the problem, the people, the evidence, or the partners are still unclear, writing will not fix it.

The eight questions

1 What problem are we solving?

State the problem in one or two sentences without naming your solution. What causes it? Where does it happen? What happens if nothing changes?

Feeds the proposal section: Problem statement or statement of need

Our answer

Status: ☐ Confirmed ☐ Partly confirmed ☐ Assumption Action and owner: _____

2 Who is most affected?

Which groups feel the problem most, and how do you know? Look at differences by gender, age, disability, location, and income. Have you heard from these groups directly?

Feeds the proposal section: Target population and inclusion analysis

Our answer

Status: ☐ Confirmed ☐ Partly confirmed ☐ Assumption Action and owner: _____

3 What evidence do we actually have?

List your sources: program records, assessments, surveys, research, and public data. Separate what you know from what you believe, and note any gaps.

Feeds the proposal section: Evidence base and needs assessment

Our answer

Status: ☐ Confirmed ☐ Partly confirmed ☐ Assumption Action and owner: _____

4 Why do we think this approach will help?

Explain the logic that links your activities to the change you want. Has this approach worked before, here or elsewhere? What makes it suited to this context?

Feeds the proposal section: Approach and theory of change

Our answer

Status: ☐ Confirmed ☐ Partly confirmed ☐ Assumption Action and owner: _____

5 What could get in the way?

Consider risks in the context, delivery, partners, funding, and safety. Which beliefs, if wrong, would break the program? How will you reduce each risk?

Feeds the proposal section: Risks and assumptions

Our answer

Status: ☐ Confirmed ☐ Partly confirmed ☐ Assumption Action and owner: _____

6 Who needs to be involved, and does everyone agree on their part?

Name partners, local authorities, community groups, and internal teams. Who leads each part? Is it agreed in writing? Are their costs in the budget?

Feeds the proposal section: Partnerships, management, and governance

Our answer

Status: ☐ Confirmed ☐ Partly confirmed ☐ Assumption Action and owner: _____

7 What will change if the program works?

Describe changes for participants in the short and medium term, and any changes in services or systems. Be specific about who changes, what changes, and by when.

Feeds the proposal section: Expected results (outcomes)

Our answer

Status: ☐ Confirmed ☐ Partly confirmed ☐ Assumption Action and owner: _____

8 How will we know?

Choose a few clear signs of progress for the main changes. Where will the data come from, who will collect it, and how will you use what you learn?

Feeds the proposal section: MEL plan and indicators

Our answer

Status: ☐ Confirmed ☐ Partly confirmed ☐ Assumption Action and owner: _____

WORKED MINI EXAMPLE

Brightwater Reading Trust plans its reading clubs proposal

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

Question	Short answer	Status and action
1. What problem are we solving?	Many children in grades 3 to 5 at our two partner schools read well below grade level, and teachers have little time for small-group support.	Partly confirmed. Ask schools for current assessment summaries (program lead, week 1).
2. Who is most affected?	Children whose families cannot pay for tutoring, and children who speak another language at home.	Assumption. Review enrollment data with schools (MEL officer, week 2).
3. What evidence do we actually have?	Two years of pilot attendance records and reading assessments. No comparison group and no external evaluation.	Confirmed for the pilot. State the limits honestly in the proposal.
4. Why do we think this approach will help?	Small groups, regular practice, and trained volunteers give children more reading time and feedback than class time allows.	Partly confirmed. Summarize published research on small-group reading support (development officer).
5. What could get in the way?	Volunteer turnover, low attendance during harvest months, and room availability at schools.	Confirmed as risks. Add a volunteer reserve list and a term calendar.
6. Who needs to be involved?	Two schools (rooms and referrals), volunteer coordinators, parents, and our finance lead.	Partly confirmed. Letters of commitment pending (program lead).
7. What will change if the program works?	Children read more fluently and with more confidence within one school year, and more of them reach grade-level benchmarks over two years.	Assumption. Agree realistic targets using pilot data (MEL officer).
8. How will we know?	Reading assessments at the start and end of each term, attendance logs, and a short survey of teachers.	Partly confirmed. Cost the assessments in the budget (finance lead).

Readiness check: questions 1, 3, and 6 are Partly confirmed or better, but question 2 is still an Assumption. The team holds the first draft for one week while the MEL officer reviews enrollment data with the schools.

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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RO5	Proposal Budget Alignment Checklist (guide: G05)

Sources and credits

The eight questions are by Atiq Rehman, Founder of Edit Right Advisors. The worksheet, prompts, status scale, and example are original Edit Right Advisors material.

The worksheet covers the ground of the first two steps of the CDC Program Evaluation Framework, 2024 (assessing context and describing the program), and the OECD DAC relevance and coherence criteria. Kidder DP, Fierro LA, Luna E, et al. 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.

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