

Sample Proposal Review Worksheet

Developed by
Stephanie McAuliffe: The David and Lucile Packard Foundation
for the July Institute for New Grantmakers, 2002

1. **What** is the applicant organization proposing to do?
 - a. What are its goals?
 - b. Are its proposed activities likely to achieve these goals?
 - c. Beyond the stated goals, what other changes are likely to occur by the project's end?
 - d. Does the proposal clearly describe and justify the project's ongoing activities?
 - e. Does it offer insights into how the project will be structured, staffed and managed?

2. **Why** is this project being proposed?
 - a. What needs does it address?
 - b. What evidence establishes the existence of these needs?
 - c. Are these needs important?
 - d. What kinds of benefits will be derived from the project's implementation?
 - e. Are any unintended positive (or negative) effects likely?

3. **Where** will the project take place?
 - a. Why was this area selected?
 - b. Will the project have influence or repercussions elsewhere?

4. **When** will the project take place?
 - a. What is the timeline for accomplishing the work?
 - b. Is the timeline realistic?
 - c. Are there any crucial deadlines that must be met?
 - d. Is the organization capable of keeping to the timeline and meeting its deadlines?

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5. **Who** will participate in the project?
 - a. Who will the program serve?
 - b. Are they the right target group given the project's goals?
 - c. Who will provide the services?
 - d. What are their capabilities?
 - e. Who will oversee the project?
 - f. What are their qualifications?
 - g. Is anybody else attempting similar projects?
 - h. Is a consultation, collaboration or alliance with other organizations being considered? If not, why?

6. **How** are the chances of success being maximized?
 - a. Is the project's approach practical?
 - b. Does it demonstrate an understanding of best practices in the field?
 - c. Have other organizations gotten results by using equivalent means?
 - d. Are you aware of similar programs that have run into serious problems in the past?
 - e. Are there any crucial difficulties the proposal has not anticipated?
 - f. How will success be measured?

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7. **How much** will the project cost?
 - a. Is the budget adequate to carry out the program?
 - b. Has the budget been padded to absorb unrelated expenses?
 - c. Is the organization using any of its unrestricted resources to support the project?
 - d. Have other funders committed their support?
 - e. How will the project continue after your funding is over?