QUALITY STANDARDS CHECKLIST
FOR PROPOSAL DEVELOPMENT

This practical checklist was developed for PIN staff to help them with developing new project proposals. It is **very easy use - within a few minutes you can check whether none of the important steps was forgotten**. As a result, your proposals are likely to be developed in a better quality and receive the required funding.

It is strongly recommended to use this QSC when developing proposals.

Project development is a process with clear steps. Each of them contributing to improve the quality of the proposals that we are developing. This checklist should be used:

- **When starting to develop a new proposal**: to support proposal development planning
- **While developing the proposal**
- **At the end of the proposal development** to check we have not omitted any important step that might compromise its quality.

All points requiring a more detailed explanation are clarified in *blue* directly below.

What are you working on? Click on the support you need!

ANALYSING NEW CALL FOR PROPOSALS	PREPARING PROPOSAL DEVELOPMENT
WORKING IN CONSORTIUM	PREPARING PROPOSAL SUBMISSION
NEEDS ASSESSMENT	LOGFRAME
PROPOSAL WRITING	BUDGET PREPARATION

CALL ANALYSIS

(Key criteria to analyse the call and to decide GO/NO GO)

1	Is PIN eligible to apply to this call? If you have a doubt, contact *Grant Helpdesk.*	Y	N	
2	Is the call in line with PIN's RDD strategy for the given sector and with PIN country strategy? Sectoral strategies are available here.	Y	N	
3	Can PIN submit more than 1 proposal? Are other PIN Country Program planning to apply?	Y	N	
4	Do we have relevant track record? In the target areas? In the sector? With the donor?	Y	N	
If we are not active in the target areas or sector, what strategy is required to remain competitive (i.e: apply in consortium)?				
5	Do we have enough time/resources to prepare a good quality proposal before the deadline? Will the project proposal affect your other tasks? Have you identified how to manage your workload so you can concentrate on the proposal development?	Y	N	
Time needed to prepare a proposal is very often underestimated with the consequence that people have to work during weekend or later during the day to submit on time.				
6	Do you need any external support to write the proposal?	Y	N	
For external support, you can contact your Desk Officer and request K&L department and Grants Development Management (GDM) Support or Technical Advisor support. If there are not available, you might need an external consultant, contact the GDM or your DO to have access to the roster of Project Development Consultant.				
6	Are there any limitations on budget distribution (e.g. maximum 25% staff and office costs, financial support to third parties)?	Y	N	
7	Is the project potential budget adapted to the country program size (too large or too low)? And adapted to the expected duration?	Y	N	
8	Have you analysed the risks related to the call/ proposal? Co-financing, Payments by results? Security, logistics?	Y	N	
10	If it is a global call, do we have a compelling argument/ idea which is likely to be successful in a highly competitive call?	Y	N	N/A
On what aspects of the call/ tender are we least competitive? What is our competitive advantage vis-à-vis our competition (e.g. technical capacity, value for money)? How can we ensure this is reflected in the proposal?				
11	Are partnerships required under the terms of this call/ tender? Would a partnership be an advantage?	Y	N	
What partnerships could be formed to make our proposal more competitive? Are any other potential applicants open to a joint proposal? Esp among Alliance 2015 members? What kind of expertise do we need to add to improve the quality of the proposal? *Have we explored opportunities for non-traditional partnerships (e.g. with private sector, universities)?*				
12	Do you know if other organisations are better positioned for this call? If yes, is it possible to partner with them?	Y	N	
13	Have you discussed the call and eventual strategy with relevant clusters/ working group ?	Y	N	N/A
14	Have you shared all these information with your Country Director, Desk Officer, Regional Coordinator to ensure that everyone has all the information available for the GO/ NO GO decision?	Y	N	

ORGANISATION/ PREPARATION				
1	Have you organized a first internal strategic meeting to clarify strategy, roles and responsibilities? Have you shared the minutes?	Y	N	
This meeting should be organised with the relevant people who will/could be involved in the proposal development from CP, DO, FO and K&L. The following points should be agreed: - *Who will lead the process?* - *Which resources are needed to develop the proposal?* - *What type of needs assessment is needed?*				
2	Once you have decided to apply for the call, have you updated the Proposal development table (SDO responsibility)? The table contributes to share information.	Y	N	
3	Is there any Information session organized by the donor?	Y	N	
Check the guidelines and website to find date and contact details to request invitation. These sessions are a good opportunity to better understand what the donor is expecting. If you (or other PIN staff) is not able to attend, make sure to have access to the minutes, presentation and/or Question and Answers.				
4	Have you identified the different roles and responsibilities among PIN (lead / proposal writer/ technical support)? Make sure that it is clear for everyone, even if it seems obvious. Write it in an email.	Y	N	
5	Have you identified who will be responsible to submit the proposal to the donor, to the portal?	Y	N	
For EC CN/ proposal, you can start the submission process as soon as you have decided to submit. By doing it, you will receive automatic notifications when new documents related to the call have been posted.				
6	Have you prepared and shared a time plan with clear division of roles between country programs, DO, FDO and K&L advisors? And consortium members if necessary?	Y	N	
Time needed to prepare proposal is very often underestimated. Realistic time plan is essential to ensure that: - *All the steps of the proposal development are considered.* - *Resource persons allocate their time (therefore it is also essential to respect the timeplan)* ***A template can be downloaded here***				
7	Are you sure you are using the correct proposal templates for the narrative, the budget, etc?	Y	N	
8	Do you need to proofread your proposal? If yes, have you included enough time for the proofreading?	Y	N	N/A

CONSORTIUM				
1	Do you need to build a consortium for this proposal? (to improve the quality of your proposal)	Y	N	
What is PIN's added value? Do we need a partner to complement PIN's added value? What kind of expertise do we need to add to improve the quality of the proposal?				
2	If yes, have you organized a consortium workshop to clarify the strategy, roles and responsibilities?	Y	N	N/A
It is essential to agree on key elements since the beginning. Who is leading the entire process? Who is the focal point in each organisation? How could each organisation contribute to the Proposal Development? Initial workshops also contributes to build commitment around the proposal development. Do not hesitate to organize several meetings to have transparent communication. A 2-3 hours meeting is very often more efficient than email exchanges. A teaming workshop agenda template is available here.				
3	Have you signed a teaming agreement with other consortium members?	Y	N	N/A
A teaming agreement is not mandatory. However, it is always better to agree on the administrative costs and cofinancing rules as soon as possible. The teaming agreement template is available here.				
4	If you are collaborating with a local organisation for the first time, have you conducted a Local Organisation Assessment Form?	Y	N	N/A
The LOAF template and training materials are available here				
5	If you are collaborating with an INGO, ask your DO and FDO if a Due diligence process must be done?	Y	N	N/A
The LOAF template and related training materials are available here				

SUBMISSION				
1	Have you checked how your proposal should be submitted? Online portal, email address?	Y	N	N/A
Registration to donors' portal and subsequent update is HQ responsibility. Please contact your Desk Officer if you need contact details or directly Grant Helpdesk.				
2	If Online portal, have you tested the portal to be familiar with it before the submission?	Y	N	N/A
3	Have you respected the character / page limits, if any?	Y	N	N/A
It is recommended to try to respect the character limits since the first draft. It will avoid situations where other contributors will read and provide comments to sections which will have to be completely modified/deleted to respect the character limits.				
4	Have you prepared/ asked the updated track record? Ask your Support Desk Officer	Y	N	N/A
5	Have you checked that all the administrative documents are prepared at least 5 working days before the submission?	Y	N	N/A
6	Have you printed and checked the donor check list for self-guidance? (ex: EC proposals have such check list at the end of the proposal template)	Y	N	N/A
7	If submitting an EC proposal, have you ensured that your co-applicant are registered under PADOR?	Y	N	N/A
If you want to control that your partner (especially local NGO) have correctly filled their PADOR registration, you can ask them to allow you to view their profile. They could create a user account with view rights. They can close the account after 2 days to give you time to control the information.				

NEEDS ASSESSMENT				
1	Did you develop a clear plan for your needs assessment, specifying a list of the required information and who can provide them?	Y	N	
4	Have you informed the relevant sector advisor that you are planning an assessment (they might have readily-available assessment guides)?	Y	N	N/A
5	Have you read and followed the Quality Standards Checklist for Needs Assessment? Check it here.	Y	N	
6	Have you met all stakeholders (intended beneficiaries, target groups, authorities, private sector) and identified their attitude and interest towards the action?	Y	N	
It is essential to spend time to identify all stakeholders and to understand their attitude as it could radically change the intervention strategy. A Stakeholder Analysis template can be downloaded here.				
6	Have you identified previous/existing/ future interventions in the target area or in the same sector in the country funded by the same donor or by other donors?	Y	N	
7	Have you identified government priorities and previous, existing or planned public interventions?	Y	N	
8	Have you ensured that your needs assessment will include the opinions and identify the specific needs of the different genders, ages and people living with disabilities?	Y	N	
9	Have you met with relevant cluster/ organisation to ensure that you are not duplicating existing intervention? They could also advise you on the most appropriate strategy/ activities/ budget.	Y	N	
10	Before the assessments, have you checked what are the modalities suggested by the donor for the intervention (e.g: Cash transfers)?	Y	N	
11	Before the assessments, have you checked what are the donor requirement to justify an intervention?	Y	N	
For example, ECHO will not support any Food security intervention if key indicators (Food consumption score and Coping Strategy Index) are not included in the needs assessment.				

LOGFRAME				
Essential: once the needs assessment is done, the following step is the LOGFRAME. First draft must be shared with HQ and resource persons before starting to write the proposal.				
1	Have you consulted the Tips and Tricks for developing logframe? Check it here.	Y	N	
2	Have you done a participatory construction of the problem tree based on the needs assessment?	Y	N	
A participatory process is not mandatory but it will contributes to ensure that all the elements have been considered. Local staff experience is crucial. It is also a strong capacity building exercise when done with the local team				
3	Have you prepared the logframe based on the problem tree and before writing the CN/ proposal?	Y	N	
4	Are you sure that your project design is in line with donor's guidelines, policies and strategies?	Y	N	
No matter how many times you have already read the Guidelines, read them again. It is important to read the call guidelines several times to have a very good understanding of donor expectations. If you have any doubt, do not hesitate to contact the donor. There is always a way to officially contact them and a deadline before sending questions.				
5	Have you ensured that your results chain (inputs=> activities => outputs => outcome => impact) is coherent and realistic?	Y	N	
Take advantage of IRC's Outcome and Evidence Framework. It delivers key information on outcomes related to health, safety, education, economic wellbeing, and power through theories of change, provides evidence for interventions that work or don't work to achieve the outcomes, and includes guidance on how to measure progress. It can help you to design your intervention.				
6	Are your Outcome/Output/ Indicator formulations SMART? (Specific, Measurable, Accurate, Realistic and Timebound)	Y	N	
7	Did you for your logframe took advantage of the indicators listed at www.indikit.net ?	Y	N	
8	Have you checked whether the donor requires to use its own indicators (e.g. ECHO's KOI and KRI)? If so, have you ensured that you have used them?			
9	Have you uploaded the logframe in ELO for its approval at least 10 days before the submission (5 days for Emergency cases)_? Check how it works here (not yet available)	Y	N	

PROPOSAL WRITING				
1	Have you consulted the Tips and Tricks for proposal writing? Check it here.	Y	N	
	Have you used the W Rule to describe the activities?			
	• *WHY – start by describing the problem the activity will address.* • *WHAT will be done* • *FOR WHOM – who will benefit from it (don't forget numbers)* • *BY WHOM – who will implement the activity (PIN staff vs. extension workers)* • *HOW MANY TIMES / HOW FREQUENTLY will it happen* • *WHERE will it happen* • *WHICH approach or well-known methodology will be used* • *WHAT materials will be used* • *WHAT change will the activity achieve*			
2	Have you developed the implementation work plan just after the logframe?	Y	N	
	Do not wait the final minute to develop the work plan! It is not an administrative tool. It contributes to develop a feasible proposal and support budget preparation.			
3	Are your activities coherent with the budget and the implementation work plan? (Feasibility) (ie: Have you budgeted all means needed to ensure that the activities will be implemented? Is your work plan feasible by ensuring enough time to prepare and implement each activities?)	Y	N	
4	Have you described how the target groups/ beneficiaries/ stakeholders have been consulted and involved in the project design?	Y	N	N/A
5	Have you included in the proposal key expressions from the guidelines? Do not hesitate to use same words, expression or even sentences, especially for the Relevance section.	Y	N	
6	Are you clear about who are your target groups/direct beneficiaries and who are the final/ indirect beneficiaries? Have you described how will you select them? Is it clear in the proposal how did you calculate the total number of beneficiaries and is it consistent throughout the proposal?	Y	N	
	Target groups are direct beneficiaries of the intervention (e.g: they receive training, inputs, etc). The project should be able to count them as part of the project monitoring activities. Final beneficiaries are indirect beneficiaries, the population who will benefit from the project (population of target area).			
7	For humanitarian project, are you sure that your proposed intervention respect the Sphere standards and country specific Humanitarian Response Plans and clusters' guidance?	Y	N	N/A
8	Is it clearly explained that PIN/ the consortium has the capacity and credibility to implement the proposed project? (highlight relevant track record, lessons learnt, etc)	Y	N	
9	Have you contacted the Communication and Advocacy Department at least 2 weeks in advance to draft the Project Communication and Visibility plan?	Y	N	
10	Have you properly described the project exit strategy?	Y	N	N/A
11	Have you developed a strong Sustainability plan/strategy? Discuss it with relevant sectoral advisors	Y	N	
12	Have you included references to the key mainstreaming/ added value elements? Avoiding discrimination across ethnicity, religions and age groups, cultural and religious sensitivity, environmental protection, HIV/AIDS, human rights, child protection, disabilities. Check the donors' policies and strategies.	Y	N	N/A
13	Have you included the M&E plan in your proposal? If you have doubts, please contact your M&E Advisor.	Y	N	

14	Have you included evidences that your project will be successful? That your Outputs will lead to Outcomes and to Impact?	Y	N	
We should show that our project design is evidence-based, this can be done through referring to existing global evidence e.g. http://www.3ieimpact.org/en/evidence/systematic-reviews/ or referring to PIN's previous experience.				
15	Did you in the proposal's methodology / M&E section included the following text about IndiKit? *To ensure that the project's baseline and endline surveys are designed and conducted to the maximum quality, the project team will take advantage of the M&E support available at www.indikit.net. IndiKit provides step-by-step guidance on collecting and analyzing data required for the most common project indicators. At the same time, its practical Rapid Guides help managers to ensure the required quality of the surveys' methodology. IndiKit was developed by PIN in cooperation with M&E specialists from INGOs and UN agencies and is currently used by up to 400 people per day*.	Y	N	
16	Are you regularly following the call webpage to check for amendments, Questions and answers documents which can influence proposal development?	Y	N	

BUDGET PREPARATION				
1	Have you identified the person in charge to develop the budget? (several person could be involved) Make sure to involve him/her soon in the process.	Y	N	
Start to develop the budget after the logframe and the time plan have been developed. Logframe will give indications on the activities. The timeframe will give indications on how many months some costs must be calculated.				
2	Is your budget in line with PIN Budgeting Policy (will be developed soon)?	Y	N	
3	Have you included relevant technical advisor (from K&L) cost in your budget (flight tickets, fees)?	Y	N	
4	Have you uploaded the budget in ELO for its approval at least 4 days before the submission (2 days for emergency proposals)?	Y	N	
5	Have you read carefully the donor's guideline for preparing budget? (esp: conditions for support costs, admin costs)	Y	N	
6	Do you need to include co-financing for your project? Check donor's guidelines. Have you received approval from your Regional Coordinator on the co-financing?	Y	N	N/A
7	Have you included enough budget for your M&E activities, including: baseline survey, mid-term review, external endline survey/evaluation, formative research (e.g. Barrier Analysis), tablets for data collection, etc.?	Y	N	N/A
8	If required, have you budgeted sufficiently to have a control group during the baseline and endline surveys?	Y	N	N/A
9	Have you used PIN's Value for Money toolkit (Available here) ?	Y	N	N/A

> Do you have a suggestion for improving the checklist's content? Let us know: resource@peopleinneeed.cz