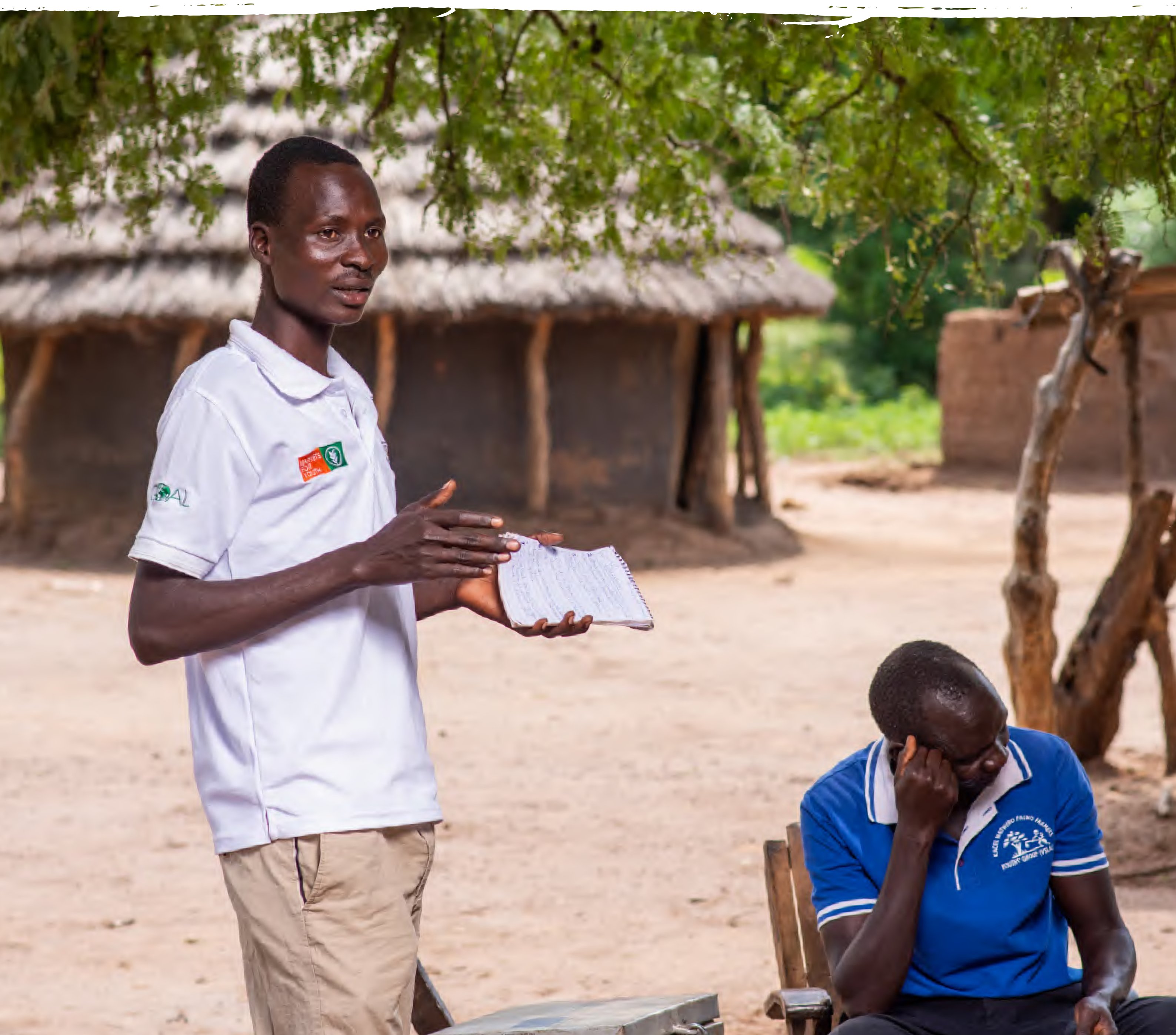
INSTITUTIONAL FUNDRAISING TOOLKIT

FOR LOCAL PARTNERS IN INTERNATIONAL DEVELOPMENT

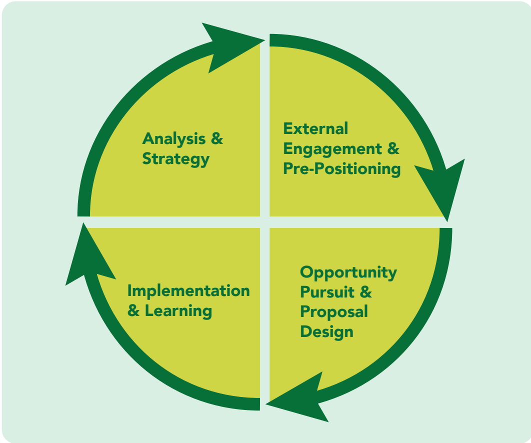


ABOUT THIS TOOLKIT

This toolkit is designed to help local organizations strategically expand and diversify their funding portfolio by navigating the full business development cycle. Whether you're a grassroots NGO, community-based organization, or local technical partner, this guide offers practical strategies and insights to strengthen your institutional fundraising efforts, and build long-term donor relationships.

The guide is structured to align with the business development cycle, which typically considers four key stages outlined in the graphic. Note these stages are not always chronological and may be happening in parallel for different donors and opportunities. A set of practical guidance notes and sample tools are provided as annexes.

Right: Business Development Cycle



1. ANALYSIS & STRATEGY

It is critical to understand the funding landscape and key actors – donors and partners – active in your context. This will help inform where to direct your business development efforts.

DONOR LANDSCAPE MAPPING

- Identify donors active in your region and thematic areas (e.g., health, education, climate).
- Review donor strategies, annual reports, and past funded projects.
- Understand their funding priorities, cycles, and preferred modalities (e.g., grants, sub-awards, consortia).
- Prioritize donors whose geographic and thematic focus aligns with your mission.
- Use tools like Devex, ReliefWeb, donor websites, and local networks to gather information and to monitor upcoming calls – see Annex 1 for a suggested list.

PARTNERSHIP MAPPING

- Identify potential partners active in the country – especially larger NGOs/INGOs that could potentially be a source of donor funding through on-granting / consortium mechanisms.
- Research their focus, priority areas, geographic presence, main projects and donors.
- Prioritize partners whose general thematic focus and values aligns with your mission.

2. RELATIONSHIP BUILDING:

PRE-POSITIONING WITH DONORS AND PARTNERS

Establish visibility, credibility, and strategic alignment before funding opportunities arise to increase your chances of success.

STRATEGIC RELATIONSHIP BUILDING & EARLY ENGAGEMENT

- Introduce your organization through tailored capability statements and impact briefs. Seek meetings to build relationships.
- Attend donor-hosted webinars, consultations and networking events. Ask questions and share your organization's work.
- Follow up with value-driven communication (e.g., sharing learning briefs, local insights).
- Build visibility: publish success stories, impact reports, and thought leadership pieces to raise your profile. Share assessment results with donors and invite them on project visits.
- Build relationships with programme officers and local representatives in advance of calls being released, attend donor consultations, particular when strategies are being developed.

PARTNERSHIP DEVELOPMENT

- Position yourself as a reliable local partner for INGOs and national agencies.
- Offer technical expertise, geographic presence, community access, or implementation capacity.
- Explore joint programming, consortium bids, or subcontracting opportunities.
- Strengthen Internal Capacity: Ensure your team is ready with updated organizational documents (e.g., registration, financial audits, safeguarding policies).
- Widely engage with consortia leads ensuring they know your programming expertise, geographical footprint etc

3. OPPORTUNITY PURSUIT & PROPOSAL DEVELOPMENT

A strong and competitive offer needs to consider the following:

- **Organisational capacity:** either as a single applicant or in a consortium you need to be able to demonstrate the required experience and expertise, capacity to implement, and ideally a reputation across the sector and/or with the donor, in the thematic focus of the Call.
- **Strong alignment** with the priorities of the Call.
- A strong, well-presented written **proposal, budget and application** that complies with all the requirements.
- **Added Value** – your offer should clearly demonstrate what differentiates you from the rest – why should the donor pick you over another applicant?

CONSORTIA AND PARTNERSHIP CONSIDERATIONS

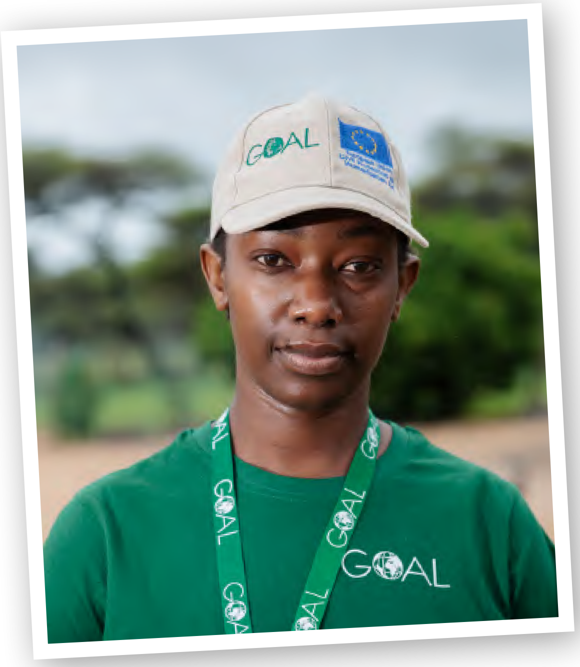
Joining a consortium can increase your possibilities of accessing large-scale funding and technical expertise. The benefits include shared resources and expertise; increased credibility and donor confidence; and access to larger funding pools, among others. When thinking about approaching potential consortium leads/partners, begin with the following questions:

- Is there an incumbent? Who is already engaging with the donor on this project or similar work? Who received funds in previous rounds? Does the donor seem to prefer to work with certain organizations?
- Who has experience with the donor in the region and in the sector? Are there any organizations who have a strong foothold in areas we do not? Do we cover geographical areas that they do not and as such can present a clear value add?
- Is there any organization with a distinct advantage? Sometimes organizations will simply be better suited to carry out most of the work, but it does not mean they may not need help.
- Is this a partner we have worked with before? If not, vetting and approval may be required to ensure this is an appropriate organization to work with. If so, what were the past experiences like? What worked well, what did not?

Key to forming an effective partnership is understanding what you bring to the table. Before engaging in conversations with potential partners, ensure you have a strong understanding of your organization's experience and capabilities. Once you begin negotiating with partners, you will most likely need to provide relevant capacity statements and track records or past performance details. Ensure you have updated relevant documents, or compiled the necessary information as soon as possible, as this highlights your organization's effectiveness as a strong partner. Ensure you are aware of what you seek to gain from other organizations, and similarly what you have to offer other groups. Consider presenting tailored 'value propositions' to potential consortia leads for specific opportunities, outlining the specific value your organization can bring to an identified opportunity.

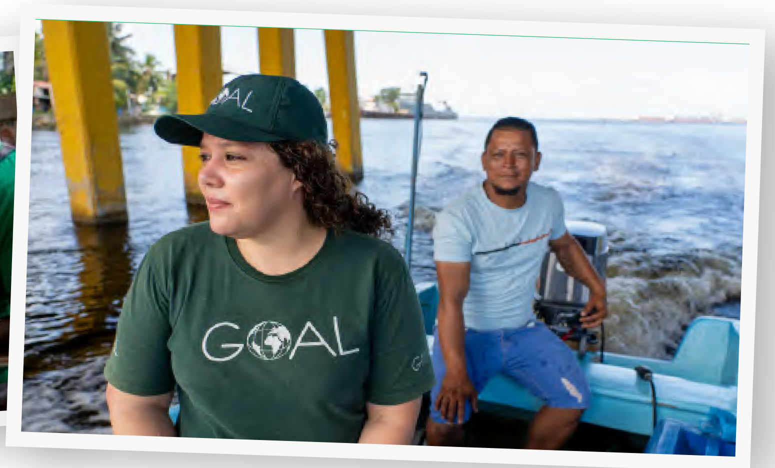
BE PROACTIVE!

Don't wait for an invitation: identify upcoming funding calls and approach potential lead organizations with a tailored pitch that highlights your unique value proposition. Share success stories, relevant credentials, and ideas for collaboration. Building relationships early can position you as a preferred partner when opportunities arise.



TIPS FOR WORKING IN CONSORTIA

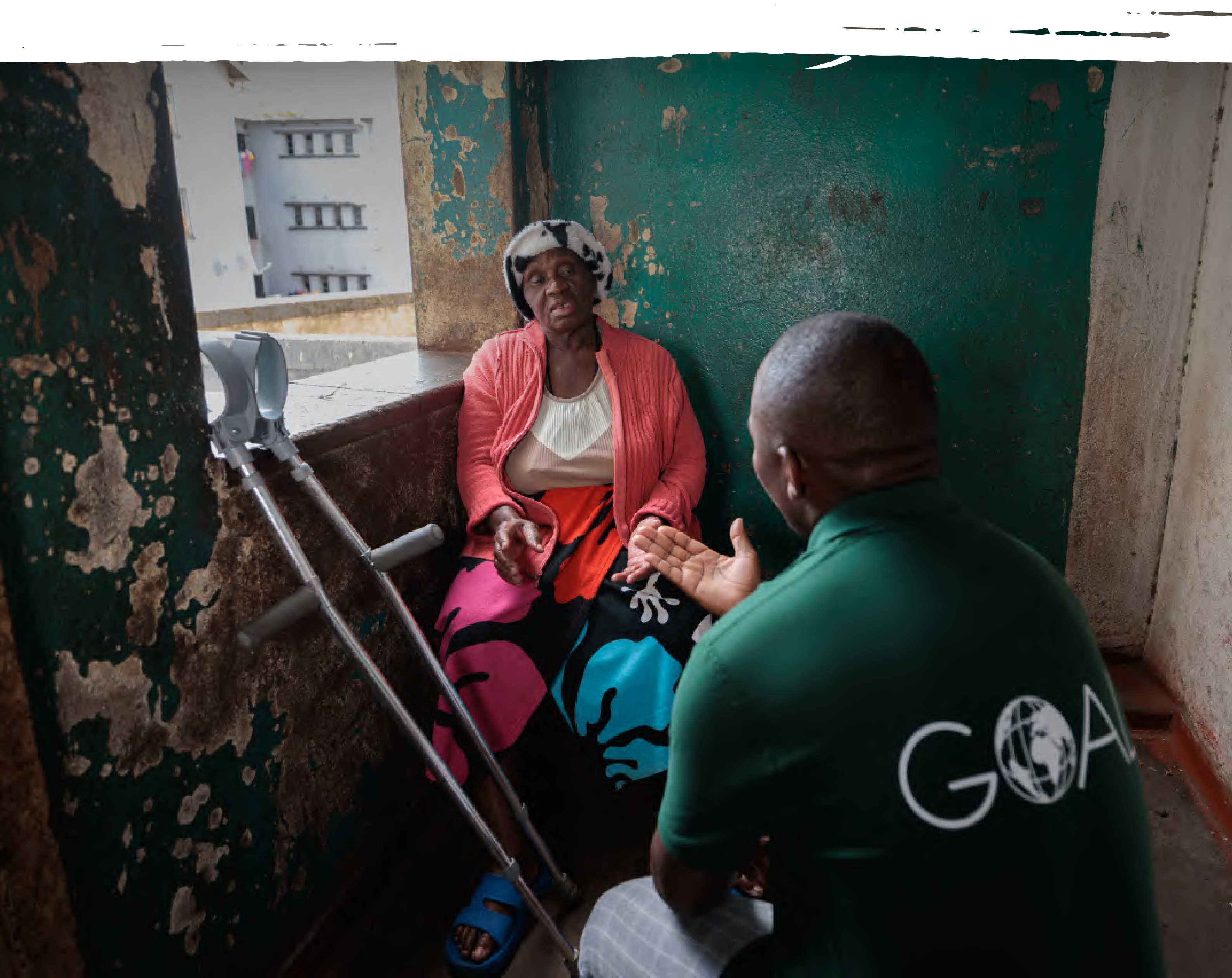
- **Clarify Roles Early:** Establish clear expectations from the outset regarding each partner's responsibilities, deliverables, and decision-making authority. Define your budget allocation, reporting obligations, and timelines to avoid scope creep or duplication of effort. A well-structured work breakdown can help ensure accountability and transparency throughout the project lifecycle.
- **Choose Partners Strategically:** Select consortium members whose capabilities, networks, and reputations complement your own. Look for organizations with a proven track record in similar projects, shared values, and compatible working styles. Consider geographic diversity, technical expertise, and stakeholder influence to strengthen your proposal and broaden impact.
- **Formalize Agreements:** Draft and sign Memoranda of Understanding (MoUs), Letters of Intent, or full consortium agreements that outline governance structures, intellectual property rights, dispute resolution mechanisms, and exit strategies. These documents safeguard against miscommunication and provide a legal framework for collaboration.
- **Clarify payment terms** whether funds are disbursed in advance or on a reimbursement basis. If payment is in arrears and your organization is a sub-partner, confirm whether the lead will provide pre-financing. If your organization is leading, ensure pre-financing arrangements have been discussed and determine whether you will extend pre-financing to sub-partners.
- **Harmonizing Approaches with Partner Agencies:** When collaborating with other partners, plan for harmonization of policies, standards, and implementation approaches where relevant. While this can be finalised during the inception phase (unless required at submission), it should be discussed during project design to reach broad agreement on minimum standards and shared principles.
- **Engage technical teams early:** Identify and involve relevant technical teams and advisors from both your organization and partner organizations at the outset. Early engagement ensures alignment on design, technical quality, and strategic direction.



ADVOCATING FOR CAPACITY STRENGTHENING AS A LOCAL PARTNER

Most donors encourage the inclusion of a clear and actionable strategy for capacity building that supports local partners' institutional growth and long-term sustainability. This should not be an afterthought – have discussions both internally to identify areas of support and with the lead agency to embed capacity strengthening within the implementation plan and budget from the outset. The following are considerations for discussions:

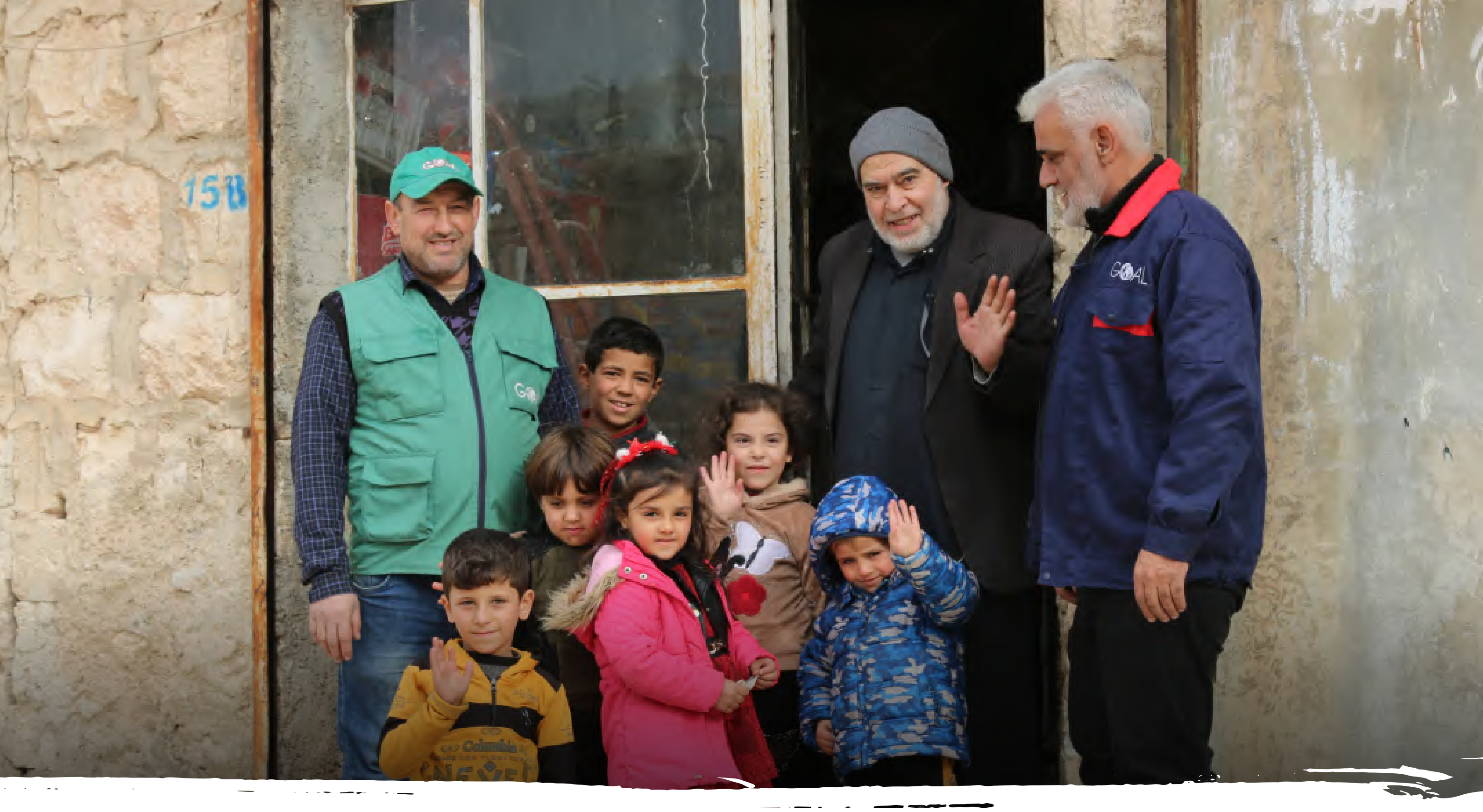
- **Dedicated Resources:** Where possible, allocate specific budget lines for training, systems development, and staff mentoring.
- **Joint Planning:** Collaboratively identify priority areas for growth – whether in financial management, monitoring and evaluation, safeguarding, or technical expertise.
- **Sustainability Focus**: Design capacity-building activities that leave lasting improvements beyond the project lifecycle, such as upgraded systems, policies, or certifications.
- **Mutual Accountability:** Establish mechanisms to track progress and ensure that capacity strengthening commitments are fulfilled throughout implementation.
- **Indirect Cost Recovery (ICR):** Unless the donor does not permit it, advocate for appropriate / pro-rata ICR to be included for your organization.



PROPOSAL DEVELOPMENT TIPS

Crafting a compelling proposal is essential to securing donor funding. Here are key practices to strengthen your submission:

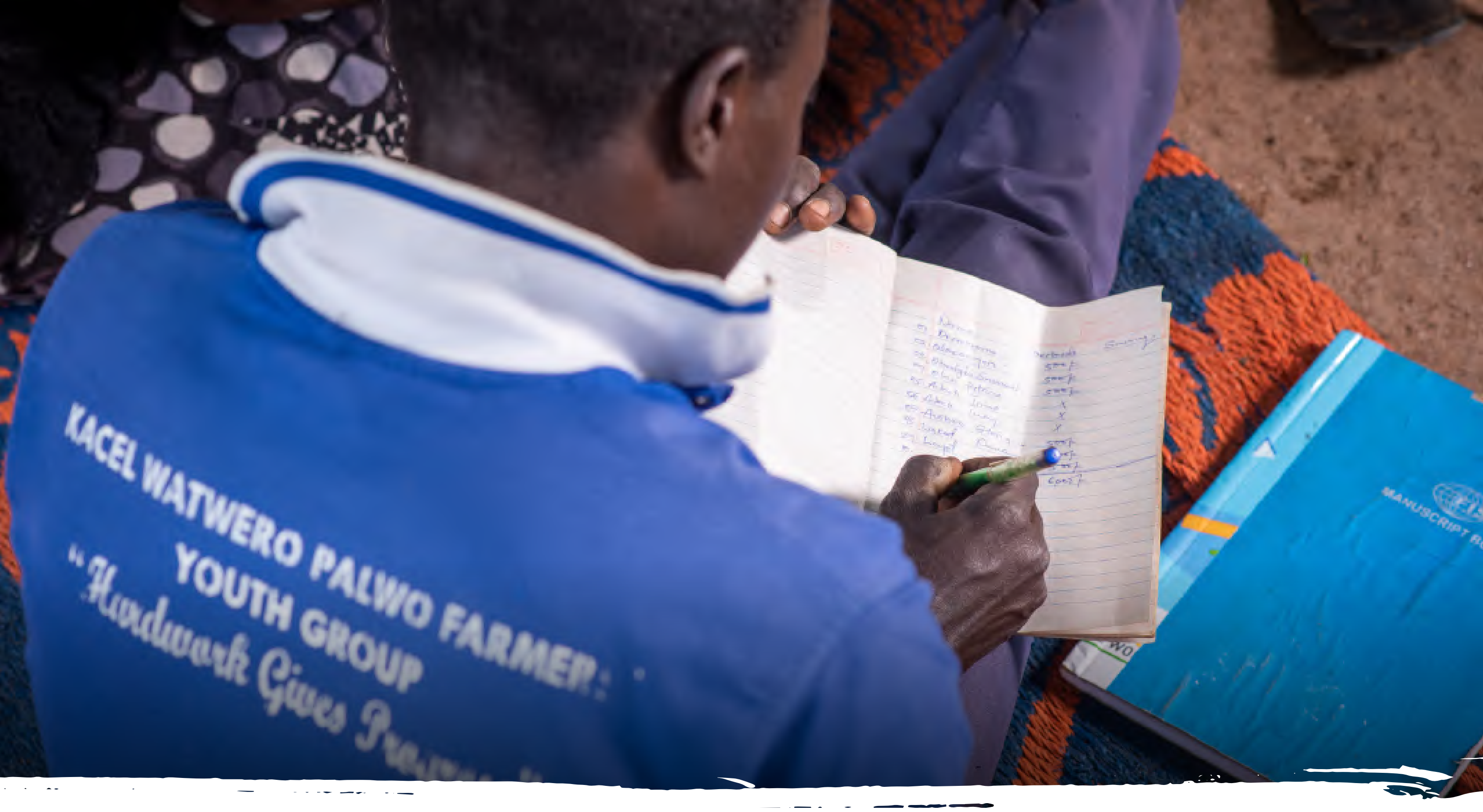
- **Understand the Guidelines:** Thoroughly review the call for proposals. Pay close attention to eligibility criteria, evaluation metrics, submission format, and deadlines. Highlight key donor priorities and tailor your proposal to directly address them. A checklist can help ensure all requirements are met.
- **Planning:** Organise Kick Off meetings. Develop a detailed proposal development workplan with feasible deadlines, and clear roles and responsibilities for all aspects of the application (design, M&E, writing, partnerships, budget, annexes, admin etc.)
- **Develop a Strong Theory of Change:** Articulate a clear and logical pathway from activities to outcomes and long-term impact. Your Theory of Change should demonstrate how your intervention addresses the root causes of the problem and leads to sustainable change. For guidance, resources like *5 Steps for Creating A Theory of Change - tools4dev* can be helpful.
- **Use Evidence:** Ground your proposal in credible data, past project success, and contextual knowledge. Enhance readability and impact by incorporating visuals such as infographics, maps, and highlighted case studies.
- **Budget Realistically:** Ensure your budget reflects the scope of work, aligns with donor expectations, and demonstrates value for money. Double-check consistency across all submission documents-proposal narrative, logframe, and budget -so that figures, activities and outcomes are fully aligned.
- **Be Kind to the Reviewer:** For competitive calls, Donors will receive dozens, sometimes hundreds of proposals. Make the review as easy as possible for them, so they can easily find the data or information they require to mark the proposal against all criteria. Do not assume anything will be inherently understood by the reviewers - present the information clearly.
- **Explanation of Deviation from Guidelines:** Donors understand that a one-size fits all model is not possible or appropriate and interventions have to be feasible for the context and in line with Government rules and local norms. Donors will usually accept deviation from their technical requirements *where this is sufficiently justified.* Explain why something is not possible in the context and what your organization will do instead, and the efforts that will undertake to meet the Donor requirements as much as possible.
- **Boilerplate Text:** Consider developing standard text, approximately half a page, for themes that are typically required in all proposals (e.g. accountability, GESI, safeguarding), which outlines your organization's approach and practices, so that you have some draft text ready which can then be tailored to each opportunity.
- **Review and Edit:** Engage multiple team members in the review process to ensure clarity, coherence, and compliance. Use a structured review checklist to catch inconsistencies, jargon, or gaps.



ADDED VALUE IN PROJECT DESIGN AND PROPOSAL NARRATIVE

The following are themes usually relevant for all interventions and which Donors are particularly concerned with. You can strengthen your application by paying close attention to these themes.

- **Gender Equality & Social Inclusion:** Describe how will your project be tailored to address the needs and differing realities of women, older people, persons with disability and other potentially vulnerable groups. How will your interventions promote GESI?
- **Accountability:** Describe your organization’s accountability mechanisms, and in particular the community feedback mechanisms that include independent grievance procedures.
- **Protection Mainstreaming:** Embed protection mainstreaming in the design and narrative particularly in humanitarian or conflict settings. Consider specific activities that will strengthen protection response that your staff could easily incorporate even without protection-specific capacities (such as mapping of protection actors in the targeted location and providing information to communities, supporting the strengthening of referral systems, working closely with Protection Cluster, UNHCR, government agencies etc.)
- **Climate, Environment:** Where possible outline how your proposed response is climate-sensitive, risk-informed, and applies a do-no-harm approach towards the environment.
- **Safeguarding and PSEAH:** Even if information is not specifically required by the Donor template, it is added value to provide details of comprehensive safeguarding and PSEAH policies and mechanisms. Annex them where possible.
- **Learning**: Where possible, make reference to lessons learned from previous programming that are informing the proposed response, and key adaptations made. Donors like to see that NGOs are constantly learning and endeavouring to improve quality and responses.



- **Coordination:** Ensure to demonstrate strong coordination practices and mechanisms with other stakeholders (NGOs, government, clusters, etc.) It can be added value to show donors that the proposed response has been discussed with and endorsed by relevant stakeholders such as Line Ministries, UN Agencies, or Cluster Coordinators – for both competitive and non-competitive procedures.
- **Evidence-based programming and data:** Presenting approaches to donors that are grounded in strong evidence that they ‘work’ is important and providing data or evidence from previous reviews, evaluations, and successes from previous interventions is added value. A funding expert highlighted that a donor will not fund organizations for what they ‘say’ they will do, they will fund organizations for what they can prove they have ‘already done’. Show the donor the evidence that the proposed intervention works.
- **Humanitarian-Development-Peace Nexus / Linking Relief, Recovery and Development:** Interventions and approaches that can incorporate strong nexus or LRRD linkages and which are clearly explained in proposals may add value as these are often priories of donors.
- **Technical Standards and Quality Benchmarks:** Ensure to refence the appropriate technical quality standards throughout the proposal (e.g. CaLP, Sphere, WHO, UNICEF); IASC, Cluster, or OCHA guidance documents; and how the intervention aligns with Government guidelines and plans (e.g. MoH Guidelines), Humanitarian Response Plans, Regional Strategies.
- **Sustainability, Scale, Impact, Local Ownership, Resilience:** Incorporate reference as much as possible throughout the proposal. Donors may have specific sections on these themes but the more you can integrate them across the proposal throughout multiple sections the better.

4. IMPLEMENTATION & LEARNING

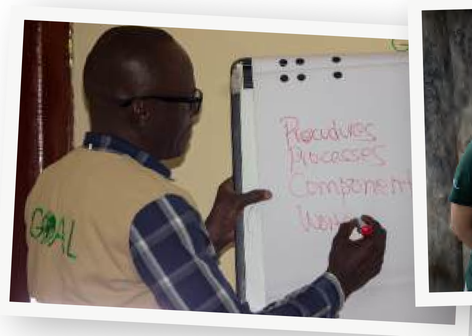
Business development does not stop when you have secured the funding. This should remain an ongoing activity throughout implementation.

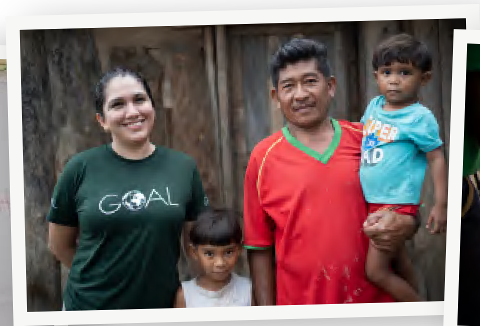
DONOR ENGAGEMENT & VISIBILITY

- Engage regularly with the donor, outside of the formal reporting requirements (as appropriate) – ensure they are kept informed of progress, contextual developments, challenges and proposed solutions
- Seek opportunities to showcase your project work directly to the donor by inviting them on field visits – ensure to prepare well.
- If you are a sub on a project, advocate with the prime for opportunities to engage directly with the donor – through meetings, learning events, project site visits.
- Share assessment reports, learning briefs, results from pilot activities, sit-reps, humanitarian needs updates. Remember that the next funding cycle is only around the corner – the information you share during project implementation can be used to advocate for the next round of funding.
- Ensure to align with the donor's visibility requirements and take the opportunity to credit the donor through social media and website publications where feasible.
- Document learning and use it to inform your next project design.

PROPOSAL LEARNING REVIEWS

- In the case your application was unsuccessful, consider undertaking a learning review.
- Assess the process – what went well, what could have been done differently?
- Assess the partnerships – were the consortium arrangement appropriate, how was it managed, were there gaps?
- Assess the project design and donor feedback – what were the strengths and weaknesses, what informed the donor's decision, and what should you do differently next time?
- Ensure to incorporate this learning into future proposals.





ANNEX 1: PLATFORMS TO TRACK FUNDING OPPORTUNITIES FOR NATIONAL / LOCAL PARTNERS

Global Aggregator Websites

These websites aggregate details about funding opportunities, drawing directly from the site where they are originally published. Often a paid subscription is required, but sometimes basic details are provided for free. Some key examples include:

Devex	https://www.devex.com/
Development Aid	https://www.developmentaid.org/
Funds for NGOs	https://www.fundsforngos.org/
Terra Viva Grants	https://www.terravivagrants.org/
Hub Cymru Africa	https://hubcymruafrica.wales/funding/
Charity Excellence	https://www.charityexcellence.co.uk/grant-funds-for-ngos/
Impact Finding	https://impactfunding.substack.com/
Grant Finder	https://grantfinder.co.uk/

African Grant Funding

Africa Grants	https://africa-grants.com/
Africa NGOs	https://africanngos.org/
Start Point Africa	https://startpointafrica.org/

Middle East Grant Funding

Arab.Org	https://arab.org/portal/resources/funds-for-ngos/

NGO Network Websites

Bond	https://www.bond.org.uk/funding-opportunities/

UN Partner Portal

UN Partner Portal	https://www.unpartnerportal.org/landing/opportunities/

UNOCHA Country-based Pooled Funds and CERF

UNOCHA manage country-based pooled funds. You need to be an existing certified partner of OCHA to access these funds. CBPFs are going to be increasingly channelled to local and national partners. Calls are shared by UNOCHA and though Cluster coordinators.

Central Emergency Response Fund (CERF) allocations are usually channelled directly to UN agencies such as UNICEF or IOM. However they have scope to on-grant to implementing partners also, this would be managed directly with the UN agency with information provided via Cluster coordination.

Bilateral Funding

- **Donor embassies** often have civil society funds available that are specifically aimed at national CSOs/NGOs. They may be published on their website or through local networks and platforms.
- **Donor websites,** including **country-specific donor websites** e.g. "EU Delegation to Ethiopia", usually publish opportunities (and sometimes they are not advertised globally)

Other Donor Directory Resources

https://humanitarianweb.org/donor-directory/
https://mesh.tghn.org/funding/
https://blog.moni.africa/uncategorized/top-grants-and-funding-opportunities-for-african-non-profits-and-ngos/

REMEMBER: RELATIONSHIP BUILDING IS KEY!

The best way to find out about potential, forecast, or live opportunities is through networking and engagement. Ensure to continuously raise your profile and engage with donors, NGOs, cluster networks and key government ministries, through meetings, attending events, sharing information and updates about your organization's work and offering etc. and gathering intel on potential opportunities and ways to partner.

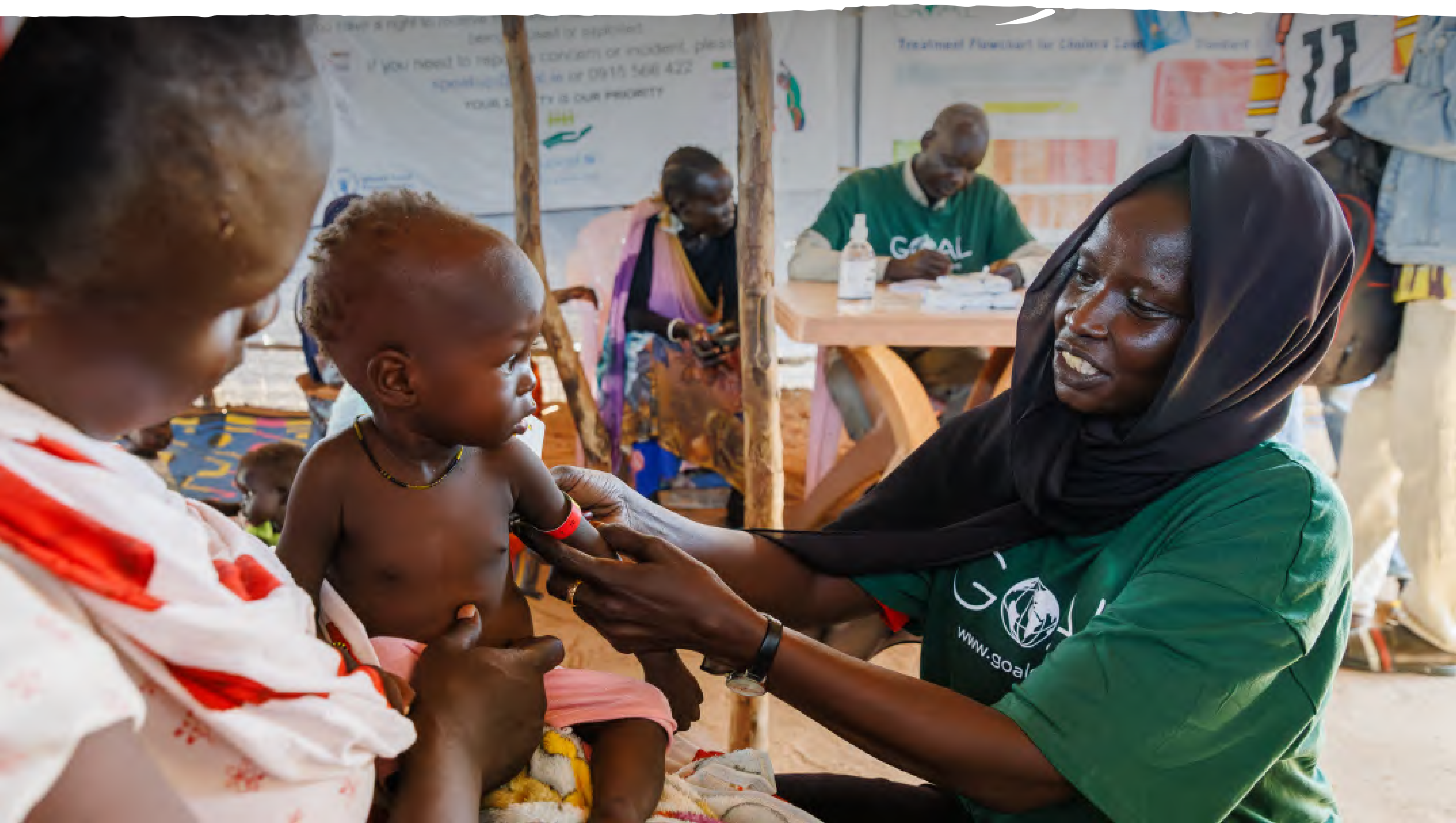
ANNEX 2: QUICK GUIDE TO MAXIMISE OUTCOMES OF DONOR MEETINGS

BEFORE

- **Know the Context & Participants:** Is this a formal or informal meeting? For example, the meeting content will be delivered differently in a café compared to a donor office. Who will attend the meeting from donor side? Technical advisors? Head of Mission/ senior reps? The content of the meeting will highly depend on the participant.
- **Agenda:** If you are requesting the meeting, you may wish to send an agenda. If not, you can ask politely what points the donor would like to discuss to make sure you are prepared.
- **Donor:** Who is the donor, do you already know them and have a partnership / relationship or history of engagement? If they are new, how did you make the connection? Research the donor in advance so you are familiar with their priorities and opportunities for discussion topics and avoid raising subjects that may be irrelevant.
- **Engagement Tracking:** Is this the first time you are meeting? If not, when was the last time you met, what was the subject, expectations, agreed action points? Did you deliver on these, is there anything outstanding and why?
- **Meeting objective:** Summarize for internal purposes what is the objective of the meeting, and what do you want to come away with. Programme updates? Intel? Advocacy on needs, discussion on challenges or solutions? Presenting a particular topic, e.g., learning, or assessment findings? Be clear on the point of the meeting.
    - If you want to understand more about the donor and their priorities in country, and areas of alignment or opportunities for collaboration you will need to show that you know the Donor's priorities, and present how your programmes align.
    - If you want to raise your profile in a specific sector or geography, share precise operational updates, providing information on the impact of programmes, data, achievements, etc.
    - If you want to advocate on needs and operational constraints, you need to provide detailed information on programme implementation, sit-reps, need assessments.
- **Content:** Identify topics for discussion in advance (based on your research or the relevant project). What messages do you want to convey? Prepare your talking points and identify questions you will ask as relevant; ensure consistency of messaging from your team members who will also be attending.
- **Materials:** Identify supporting materials you'd like to provide the donor with during the meeting and allocate time for printing if necessary (E.g. brochure, annual report, capacity statements, PowerPoint presentation). You may wish to share this by e-mail, but sometimes it is useful to have some documents to hand – it also means that you don't need to memorise a lot of data. However, don't overdo it; donors have limited time to read a lot of materials.
- **Ongoing Project:** If you have a current partnership, ensure you have up-to-date information on your project, achievements, context, challenges (and proposed solutions), and plans. Be able to answer questions and build their confidence in your ability to deliver.

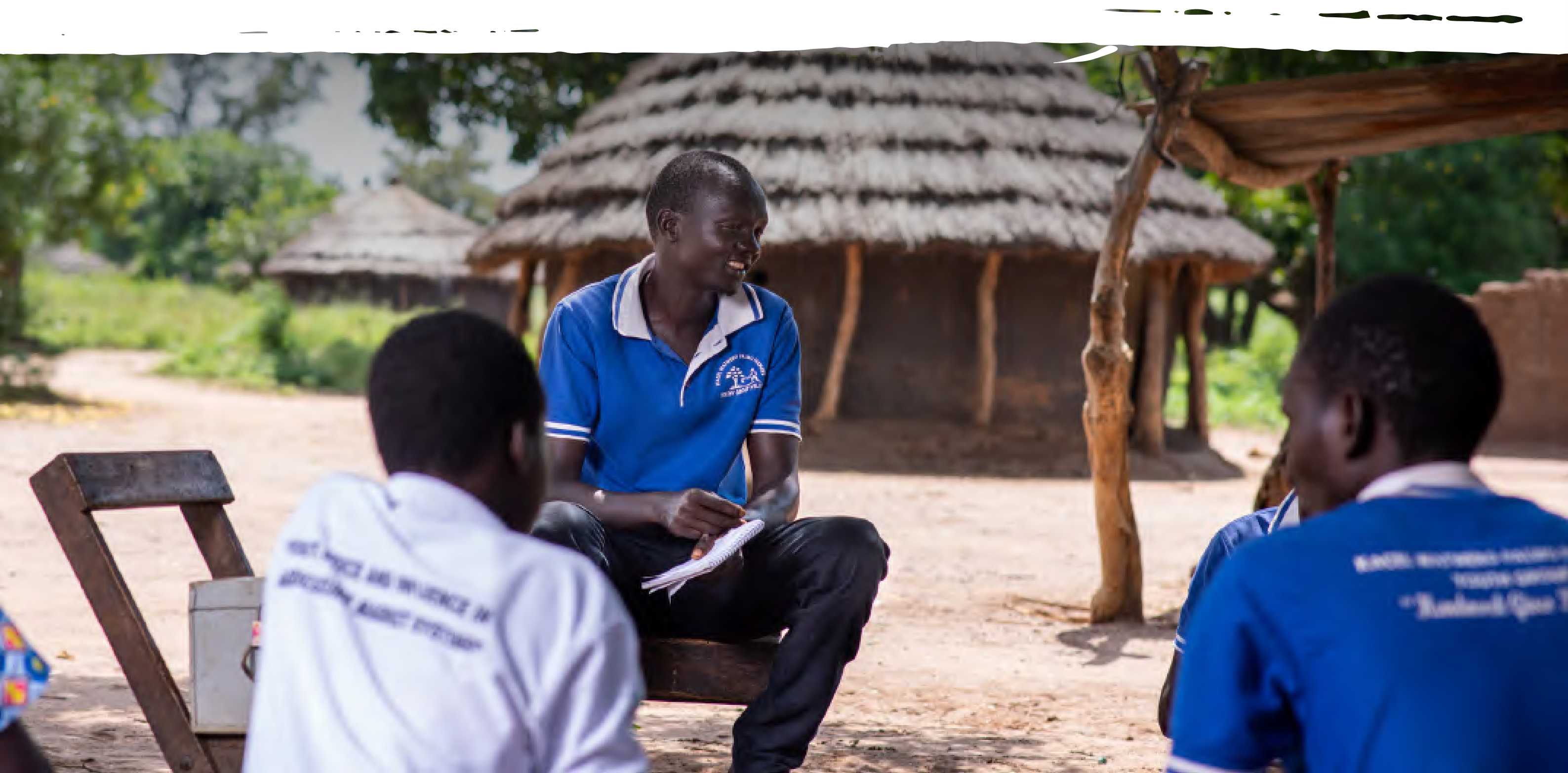
DURING

- **Engage and actively listen:** Don't do all the talking, make sure to listen! What are the key messages, what does the donor want to know and what interests them? Ensure to leave time for the donor to provide feedback/advice, ask questions and share their priorities/concerns.
- **Keep it positive:** If there are challenges, don't focus only on the problems, be honest about challenges but equally offer solutions or recommendations on how to proceed, and try to get buy-in from the donor – engage in the spirit of partnership!
- **Show you understand their priorities** – and how your work can help the donor achieve them (preparation in advance is key).
- **Add Value:** Donors rely on partners to implement programmes and help them achieve their objectives! Try to add as much value as possible, providing contextual intel and information based on on-the-ground experience, technical expertise, and so on, that may interest the donor which they may not have.
- **Acknowledge if there is information you don't hav**e – and offer to follow-up with your team and share it afterwards.
- **Build connectors for future engagement:** For example, is there additional information you can share by e-mail (e.g., project-related, or learning reviews, context updates?). Is there any opportunity for a follow-up meeting, are there other contacts you would like them to connect you with for specific reasons (e.g., technical advisors, regional staff etc.)?
- **Is there anything in particular that you can be helpful with**? For example, connecting donor technical staff with other key connections in the sector, or sharing information?
- **Action Points:** Be sure to track what action items, and who is responsible for them.



AFTER

- **Thank you note:** Send a follow-up email thanking them for their availability and the opportunity to discuss a specific issue. Share additional documents that were mentioned in the meeting. Offer to re-connect contact at a later date, as appropriate.
- **Debrief:** Debrief with your staff to ensure the key messages from the meeting are understood, all action points are captured, and that you have identified any relevant opportunities for further strategic engagement.
- **Engagement Tracker:** Update your donor engagement tracker to ensure there is a record of the meeting, participants, and any follow up action.
- **Share intelligence gathered internally** with your teams as relevant.
- **Identify action points (with timelines and responsible person):** For example, do you need to arrange a follow-up meeting, or internal meeting to discuss feedback? Do you need to make introductions, share any update or document, meet with a peer agency, etc.?
- **Use the intel to contribute towards your Funding Strategy:** How does the information you received potentially steer or influence your strategy – do you need to pursue engagement with other peer agencies? Is there a need to do more thorough internal analysis? Is the donor focusing on a particular sector or approach you could capitalise on? Are there networks or alliances that it would be good to be represented on, to create visibility with this donor?
- **Use the connectors you established:** Be strategic about how you use the intel and contacts – are there opportunities for further engagement, other business development actions?
- **Deliver:** Make sure you get back to the donor with what you agreed to, and in a timely manner.
- **Follow-up** if you are waiting on something from the donor – e.g., perhaps they agreed to share some information, or connect you with someone. If it is not urgent, give it some time and then follow-up.



ANNEX 3: PROPOSAL DEVELOPMENT CHECKLIST

Tool Usage: The Checklist is an optional tool to use when developing any proposal to ensure that programmatic and operational minimum standards are considered. The checklist can be used from the initial planning stage and throughout the entire proposal development process, as a guide for the main elements which the team need to consider during the proposal development.

The checklist has multiple functions:

1. As a management tool for Country Director to monitor proposal development and quality.
2. To guide and support those involved in the proposal process on what aspects need to be considered during proposal development, budgeting, writing, and submission.
3. To assist stakeholders in their review, to assess whether important aspects have been sufficiently addressed in the programme design, donor proposal, and budget.

1. Technical Quality, Approach, Design and Write-Up			
Theme	**Item/Issue**	**Yes/No**	**Comments**
Needs Assessment & Country Priorities	**Needs Assessment**: Has a thorough needs analysis been conducted with the participation of affected communities, government, partners, and other stakeholders? Has this been documented and an assessment report produced which can be attached to the proposal (if relevant)?		
	Government/UN Strategies: Is the proposed approach in line with local government / humanitarian stakeholder strategies and priorities? Is this referenced within the narrative?		
Coordination & Endorsement	**Consultation:** Has consultation / coordination taken place with key stakeholders (Community, Cluster, Partners, Government) during planning, and to inform programme design?		
	Coordination: Does the proposal clearly outline how you will coordinate during the project implementation (Government, UN, Clusters, Partners, other NGOs, Community Leaders, Private Sector, Other initiatives)		
	Duplication/Overlap: Have you ensured no duplication or overlap with efforts of other NGOs?		
	Endorsement: If endorsement of the proposal is required by any stakeholder (Cluster lead, UN, Government) has this been requested, and has this been mentioned in the proposal?		
	Synergies/Complementarity: Have synergies been identified with your /other stakeholder initiatives and are these adequately discussed in the proposal? How do your plans fit or complement other donor / Government / partner initiatives?		

<table>
<tr><th colspan="4">1. Technical Quality, Approach, Design and Write-Up (cont.)</th></tr>
<tr><th>Theme</th><th>Item/Issue</th><th>Yes/No</th><th>Comments</th></tr>
<tr><td rowspan="7">Technical Approach & Programme Strategy</td><td>Technical Team Inputs: Have relevant technical members been involved / consulted on the proposal design from the initial stage (sector-specific and cross-cutting issues also – gender, resilience, cash, SBC).</td><td></td><td></td></tr>
<tr><td>Donor requirements: Is the technical approach in line with the donor guidelines and requirements?</td><td></td><td></td></tr>
<tr><td>Theory of Change/Response Analysis: Does the response address the stated needs? Is there a logical flow in the proposal between needs assessment and proposed response?</td><td></td><td></td></tr>
<tr><td>Approach: Is the overall approach clearly described in a way that will be easily understood by the donor? Has another person reviewed it to confirm they understand the approach as it is described?</td><td></td><td></td></tr>
<tr><td>Integration: Are the sector interventions integrated with each other? Is it clearly described which target groups and participants will be addressed by multiple sectors/activities etc.?</td><td></td><td></td></tr>
<tr><td>Results/Impact: Does the proposal clearly describe what the impact of this intervention will be, what will be achieved, why it is worthwhile for the donor to invest in it?</td><td></td><td></td></tr>
<tr><td>Activities: Are the sectors, sub-sectors and activities described in detail within the proposal document; do they incorporate all donor guidance on specific sectors?</td><td></td><td></td></tr>
<tr><td rowspan="3">Accountability & CHS</td><td>Participation: Does the proposal adequately reflect the involvement of the affected population (men, women, boys, girls, youth, people with disability, older people, minorities, host, IDP, etc.) in the needs assessment, proposal design, project implementation, monitoring decision-making etc?</td><td></td><td></td></tr>
<tr><td>Information-Sharing: Have you clearly described how information will be made available to the project participants regarding your organisation, the project, donor, entitlements, targeting criteria, activities, feedback mechanisms, etc.?</td><td></td><td></td></tr>
<tr><td>Feedback & Grievance Mechanisms: Does the proposal clearly explain the feedback mechanisms and grievance procedures which will be in place, how the community will be made aware of them, how they will be inclusive, etc?</td><td></td><td></td></tr>
</table>

1. Technical Quality, Approach, Design and Write-Up (cont.)			
Theme	**Item/Issue**	**Yes/No**	**Comments**
Inclusion & Project Participants	**Vulnerabilities & Capacities:** Does the proposal adequately consider the specific vulnerabilities of the project participants and affected groups. Does the proposal also leverage participant capacities?		
	Gender, Age, Disability: Is the approach gender-sensitive at minimum? Does the proposal include sufficient gender and age analysis and mainstreaming? Have additional vulnerabilities (such as disability, ethnic minorities, displacement status etc.) been considered?		
	Target Groups: Have the target groups been clearly described?		
	Reach: Does the proposal clearly describe the number of direct participants, indirect, households etc. Has double-counting been taken into account when counting unique individuals reached by sector and overall?		
	Disaggregation: Does the proposal clearly describe the target groups and refence age and gender breakdown, at a minimum, with disability breakdown where possible, and IDP/host/refugee breakdown as relevant?		
Partnership & Localisation	**Partnerships:** Does the project include partnerships with other actors such as Govt, Private Sector, NGO, CSOs? Are the partnership approach and actors involved clearly described?		
	Roles: Where multiple organisations/actors will implement the project, are the roles and responsibilities of each actor clear and clearly described in the proposal?		
	Partnership Management: Has a budget been included for partnership management, monitoring, and capacity building?		
Protection	**Protection Analysis:** Is a protection analysis included regarding the impact of the crisis and protection risks, especially, but not limited to, GBV?		
	Protection-Mainstreaming: If relevant, are the Global Protection Cluster principles mainstreamed throughout the intervention? Are protection mainstreaming activities included? Is there a description of referral pathways to appropriate actors?		

1. Technical Quality, Approach, Design and Write-Up (cont.)			
Theme	**Item/Issue**	**Yes/No**	**Comments**
Resilience, Sustainability, Exit Strategy	**Resilience:** Are the activities designed in a way that builds resilience where possible, and have details been provided within the proposal (individual, household, community, government, system etc.)?		
	Sustainability / Exit Strategy: Has it adequately been thought through how the project activities will be sustained beyond the project timeframe and who will sustain them? Will follow-on funding likely be needed? Have the above elements been clearly described in the proposal?		
Safeguarding	Have safeguarding **risks** been identified and addressed in the project design and proposal narrative (adherence to policies and guidance)?		
	Have you **planned and budgeted** for training or awareness raising on safeguarding risks, mitigations, and methods to report wrongdoing, for staff, partners, community, and government?		
	Have **reporting systems** to receive and respond to safeguarding / PSEAH concerns or incidents been described in the proposal?		
Risk Analysis	**Risk Analysis & Mitigations:** Have project risks adequately been considered (those affecting the project objectives, activities, organisation, environment etc.) and are they documented in the proposal as relevant with corresponding mitigations?		
	Fraud: For high-risk environments, and as required by the donor, have appropriate mitigations related to fraud, aid diversion, wrongdoing, sanctioned groups, been described?		
	Assumptions: Are critical assumptions/pre-conditions identified and included in the proposal?		

1. Technical Quality, Approach, Design and Write-Up (cont.)			
Theme	**Item/Issue**	**Yes/No**	**Comments**
Capacity and Management	**Project Management & Oversight:** Are management and oversight arrangements described in the proposal? If required, is operational set-up / structure described (office set-up etc.).		
	Consortium: If a consortium approach, what is the proposed project management structure, has this been agreed with the Prime / Partners, is it described in the proposal where relevant?		
	Partners: Are details on partner monitoring and oversight included?		
	Capacity & Experience: Does the proposal include sufficient detail on partner capacity to implement the activities, value-add, expertise, experience in the sector and region etc.		
Value for Money	**Operational Efficiencies / Cost Effectiveness:** Where possible or required, does the proposal clearly describe how these issues are incorporated into the project design, budget etc. Is there clear value for money presented?		
Monitoring, Evaluation and Learning	**Donor Guidelines:** Have donor guidelines been adhered to on use of specific indicators?		
	Indicators: Are Indicators SMART? Is there a clear distinction between output and outcome indicators, are the appropriate to measure the activities and change		
	Processes and Tools: Does the proposal adequately describe monitoring processes, framework, data collection, tools, staff, technical backstopping, etc?		
	Baseline/Endline: Is a baseline/endline survey included and appropriately budgeted for?		
	Learning: Are the activities designed based on previous learning, and has learning from other stakeholders (Cluster, Partners, studies etc.) been considered and referenced in the proposal?		
Feedback	Has feedback from the donor (if any) been addressed and incorporated as relevant (e.g. where this proposal is the next stage of submission after Concept Note / EoI)?		

2. Programme Budget and Financial Arrangements			
Theme	**Item/Issue**	**Yes/No**	**Comments**
Payments	**Payment details:** Are these understood? Will it be payment in arrears or advance?		
	If this is payment by results, has this been sufficiently discussed and are risks understood?		
Fluctuations	**Exchange Rate Fluctuations and Inflation:** Have inflation, FX rates and fluctuations been appropriately considered when costing activities and programming, especially for multi-annual programmes?		
On-Granting	**On-granting:** How much of the budget will be on-granted to partners/consortium members? Has a budget been received from the partner/consortium members?		
Co-fund	If required by donor, has co-funding been secured? If not, have likely co-funding scenarios been identified?		
ICR	Have indirect costs (ICR) been included at the appropriate rate?		
Allocations	**Fair allocation:** Have core costs and support costs been fairly allocated to this budget?		
	Non-recoverable costs: Have associated costs that will not be covered by the donor or cannot be included within the budget (including sufficient/ fair share of core costs and support costs), been identified, which need to be covered by your organisation or other donors? Is this properly understood, documented?		
Programme Delivery	**Programme activities and supplies:** Are all activities budgeted? Are these adequately budgeted and do they match the narrative (e.g. # trainees, # sites, # supplies per household etc.)		
	Vehicles: Have adequate number of vehicles (including associated vehicle running costs such as fuel, vehicle maintenance and repair costs, etc) been budgeted at field level to ensure achievement of activities for all sectors. Is appropriate truck rental, secondary transport included for supplies?		

2. Programme Budget and Financial Arrangements (cont.)			
Theme	**Item/Issue**	**Yes/No**	**Comments**
HR	**Direct Staff:** Have sufficient direct technical staff at field level been included for implementation, monitoring and management purposes?		
	Is a sufficient allocation for **support staff** included?		
Capacity Development	**Capacity Development:** Has a budget been included for specific learning, training, workshops, capacity development etc., where allowed by the donor?		
Systems	**Equipment (field):** Is this adequately budgeted and in accordance with planned number of sites, field offices etc.		
MEAL	**MEAL costs (project):** Have these been sufficiently included (staff, per diems, transportation, government monitoring).		
	Budget: What % of the budget is allocated to MEAL? (Aim is 10% / or as per donor guidelines)		
Safeguarding	**Safeguarding & Protection/GBV Mainstreaming:** Have funds been allocated for these activities within the budget		
Value for Money	**Cost-effectiveness:** Have you calculated and agreed costs thinking through the following ratios and in line with donor and/or Government guidelines? • Total Support Cost vs. Total Direct Cost • Total Direct Programme Cost vs. Total Budget • Total Direct Beneficiaries vs. Total Budget		
Narrative	Does the proposal narrative match the final budget? Do the amounts per objective/result that are listed in the proposal narrative match the final budget?		

3. Operational Considerations			
Theme	**Item/Issue**	**Yes/No**	**Comments**
Procurement & Logistics	Does the donor have specific procurement policies or can you use our own procedures?		
	Does the proposal include high value procurement? (>€30k)		
	Are proposed supplies available on the market, have you factored in any potential delays or seasonal issues affecting supply into the workplan?		
	Is the timeframe sufficient to procure proposed supplies/services/works in accordance with policies? Is sufficient time factored in for national / international tenders (if required)?		
	Does the proposal include the purchase of restricted goods, medical supplies and/or equipment? Has this been identified in the proposal where relevant? This is critical as many donors have strict regulations on medical procurement that may affect project timelines.		
	Does the donor allow for depreciation of vehicles to be charged to the award? If not, is there provision for funding of country office fleet / leasing in the proposal?		
	Have requirements on logs/procurement staff workload been considered (staff capacity and capability?)		
Human Resources	If new positions will be required to deliver this project, are these skillsets available on the local market, or will international recruitment be required? Has the recruitment timing been considered in the budget?		
	If international positions will be recruited, have issues of work-permit, salaries and donor guidelines on expats been considered?		
	Where skillsets which are in high demand and low supply (e.g., MSD experts) will be required, has an adequate salary been budgeted?		

3. Operational Considerations (cont.)			
Theme	**Item/Issue**	**Yes/No**	**Comments**
Human Resources (cont.)	Will consultants be required to support activities? Has availability of such resources been ascertained?		
	Have sufficient human resources been included within the budget to ensure the project activities can be achieved *without* jeopardising other ongoing projects?		
	How will the project staffing / management structure be integrated within the existing country programme structure?		
Security	For programmes in conflict or volatile contexts, has a security risk assessment linked to this specific project been conducted?		
	Has a budget for security costs been included if required (training, equipment etc.)?		
	Have mitigations against security concerns been incorporated?		

ANNEX 4: PROPOSAL SUBMISSION CHECKLIST

The below should be adjusted / amended in accordance with the Donor requirements. The template provides the basis of points to consider, but specific requirements should be identified in accordance with the Donor guidelines.

Donor Requirement (as per Guidelines)	Yes/ No	Comments *If you have deviated in any way from the Donor guidelines, explain. Indicate source or back up information as relevant.*
Narrative Proposal		
Use of most up-to-date Donor template (details shared in Call for Proposals).		
Proposal for Donor is saved in the file format required by Donor (Word/PDF etc.).		
All instructions within the Donor template (guidance on what to include in each section etc.) have been followed.		
All instructions regarding page limits, font size etc. have been followed.		
Log-frame includes specific Donor indicators where required and all indicator guidance has been followed.		
Insert additional specific instructions as required		
Cost Proposal		
Use of most up-to-date Donor template.		
Adherence to most up-to-date instructions.		
Budget Summary, Detail, Workings, and Narrative Tabs are prepared as per Donor guidelines.		
Insert additional specific instructions as required.		
Required Annexes (List as per Donor guidelines)		
Insert		
Insert		
Insert		
Insert		
Insert		
Insert		
Coherence		
Cross-check of narrative, budget and annexes to ensure they match.		
Submission		
Submission on relevant platform.		
Donor File Naming Conventions respected.		
Deadline date and time are noted and respected.		

ANNEX 5: PROPOSAL DEVELOPMENT WORKPLAN (SCHEDULE)

The below provides a **general list** of steps during a proposal development process where you are submitting as a single agency (not in consortium). The exact steps will of course be adapted according to the specific application, involvement of partners, complexity of the process etc.

What	Who	Deadline	Status	Comments
(Depending on the complexity of the process this list of specific activities can be more or less detailed.)	*(Who is individual responsible for the specific activity or output?)*		*Done? Ongoing? Delayed?*	
General				
Create Teams / SharePoint channel				
Registration on Donor website/ submission platform (if relevant)				
Share Guidelines/Call for Proposals/Templates to all relevant individuals				
Initial high-level planning and brainstorming meeting.				
Share relevant background documents among team (e.g. OCHA, needs assessments, sit-reps etc.)				
Weekly coordination meetings between core proposal development team				
Add rows and activities as relevant, and in accordacne with decisions made during the process.				

What	Who	Deadline	Status	Comments
Proposal Narrative				
Develop Template in Word, assigning inputs to various team members, as relevant				
Detailed design meetings / workshops				
Content - 1st Draft				
- *Activities & Approach Write Up (first draft)*				
- *Detailed Logframe*				
- *Country-specific sections (as per template)*				
- *General sections (as per template)*				
Share 1st Draft Technical Proposal with relevant team				
Content - 2nd Draft				
- *Revisions after review*				
- *Beneficiary Calculations*				*It is better to do this after the budget is nearly finalised, as the exact number of people to be reached will be informed by what the budget can accommodate and this way you don't need to keep changing in the proposal*
Final Donor Version				
Budget				
First draft				*Budget needs to be prepared alongside the design & approach.*
Submit for review				
Feedback				
Revisions				
Final Financial details relevant for narrative				

What	Who	Deadline	Status	Comments
Final Donor Version				
Annexes (Donor Version)				
Workplan				
Beneficiary Calculations				
Map				
Needs Assessments				
Add/adjust as relevant to the particular requirements (and Call for Proposals)				
Submission				
Submission to Donor				*Endeavour to submit one day before the deadline*
Deadline				