

***Checklist instructions: All text in italics is instructional and will help you to complete the checklist. It should be removed from your document.***

*The following outlines the key activities that should be done and questions that should be answered in the Propose phase of a project. It should be reviewed before beginning the Propose phase and then periodically after that to remind you of what still needs to be done. Many project managers find it useful to have a printed copy of the checklist at their desk for easy reference.*

*Space is included at the bottom of the list to include any additional activities you may need to do during this phase.*

## Propose Phase Checklist

Activity / Question	Tool/Template	Complete?
Do you have an idea for a project?	Scope Statement	
Do you know what need or opportunity the project will address?	Scope Statement	
Have you considered other ways to address the need or opportunity?	Scope Statement	
Have you considered if you'll have the resources and time needed to do the project?	Scope Statement	
Will the project address the strategic priorities of one or more funders?	Scope Statement	
Have you discussed the idea with other networks?	Scope Statement	
Can you work with other networks on the project?	Scope Statement	
Have you identified the scope of the project?	Scope Statement	
Have you prioritized the scope?	Scope Statement	
Have you identified what will be out of scope?	Scope Statement	
Have you identified products or services that could be created in	Scope Statement	

Activity / Question	Tool/Template	Complete?
a future project?		
Is the scope based on past experience and advice from the people who will do the work?	Scope Statement	
Have you created a list of activities that will need to be completed for the project?	Work Breakdown Structure	
Have you estimated the amount of effort required for each activity?	Work Breakdown Structure	
Are the efforts based on past experience and advice from the people who will do the work?	Work Breakdown Structure	
Have you included planning, designing, testing, delivering and evaluating activities in your list?	Work Breakdown Structure	
Have you included project management activities in your list?	Work Breakdown Structure	
Have you included sustainability and change management activities in your list?	Work Breakdown Structure	
Have you included a margin of error of at least 20% in your total effort estimate?	Work Breakdown Structure	
Will your effort estimates realistically allow you to create the scope you've indicated?	Scope Statement	
Have you identified the roles that will be needed for your project?	Roles and Responsibilities Chart	
Have you determined the number of people that will be needed for each role?	Work Breakdown Structure	

Activity / Question	Tool/Template	Complete?
Have you created a budget for your project?	Budget	
Is your budget based on the amount of work indicated in your Work Breakdown Structure?	Budget	
Are the estimated costs based on past experience and advice from the people who will do the work?	Budget	
Is your budget based on roles (e.g., writer), not specific job titles (e.g., Executive Director)?	Budget	
Have you done other research as needed to complete your budget?	Budget	
Have you included a margin of error of at least 10% in your budget for unanticipated costs?	Budget	
Is your budget within the range that the funder is willing to fund?	Budget	
Will your budget realistically allow you to create the scope you've indicated?	Scope Statement	
Have you written the proposal?	Proposal	
Does your proposal match the scope statement, workplan and budget you've created?	Proposal	
Have you had the proposal reviewed by at least one person and made revisions based on that review?	Proposal	
Have you reviewed the proposal one last time to be sure everything is complete and realistic?	Proposal	
Have you submitted the proposal on time?	Proposal	

