

# PROPOSAL PLAN

## TEMPLATE

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Your  
Fundraising  
Catalyst

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# 1. Opportunity Details

Opportunity Details	
Customer Name/Procuring Agency	
Opportunity/Contract Name	
Solicitation Number	
Proposal Conference Date/Time	
Questions Submission Date/Time	
Submission Date/Time	
Submission Type (Electronic/Hardcopy)	
Contract Value	
Contract period	

## 2. Major Proposal Details and Tasks

Major Proposal Details and Tasks		
Proposal Milestones and Dates	RFP Release	
	Kickoff Meeting	
	Q&A Due Date	
	Final Formatting	
	Delivery Date	
	Submission Deadline	
Submission Details/Instructions		
Signatures/Sign-Off		

### 3. Proposal Schedule (Calendar View)

This section should include a calendar view of the schedule to help team members visualize their schedules, upcoming deadlines, and how long they have between deadlines to complete their assigned tasks.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
February		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

## 4. Team Members

This should include the list of all individuals who will contribute to this opportunity. For each individual, include their role/responsibility on this bid, contact information (phone and email address). For start-ups, all these roles may be taken up by one or two individuals. You can also contract external service providers to support roles like editing and graphic designing.

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Name	Role/Responsibility	Contact Information
	Proposal Manager	
	Decision maker (Program Director)	
	Grant Writer	
	Editor/Graphic Designer	
	Subcontractor(s)/Teaming Partner(s)	

## 5. Key Personnel

This section identifies the key personnel that you need to implement the project. This may require you to outsource some individuals.

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Role	Name/Proposed Individual	Company	Comments

### 6.0 Partners

This section identifies the partners that you may need to implement the project. Read the donor instructions well to ensure partnerships are allowed.

Partner	Organization Status (CBO, FBO?)	Roles and responsibilities	Value addition

## 7.0 Win Themes

Identifying the key win themes is critical in writing successful proposals. Identify some of the themes that need to run through your proposal.

## 8.0 Proposal Requirements/Action Plan

In this section, note specific requirements and develop an action plan on the same. See a sample below:

Description of Requirements	Status	Person Responsible	By when

## 9.0 Important Notes

In this section, note any important points that you extract from the guideline. This could include any specific information on editing and formatting of the documents, page limits, font types and sizes etc. It could also include information of target countries or counties, list of support documents among others.



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# ALL THE BEST!

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