PROPOSAL DEVELOPMENT

Module 4 Lesson 4 – Proposal calendar

Items to include in Proposal calendar:

For the technical proposal and technical annexes you might list:

- Kick-off meetings
- Design meetings
- Preliminary sections/components completed and circulated (such as the theory of change, organisational chart, win themes, draft work plan)
- First full draft of main narrative completed and circulated
- First full draft of technical annexes completed and circulated
- Feedback from the proposal team received
- Feedback incorporated and revised drafts completed and circulated
- Internal technical reviews
- Packaging and compliance checks
- Final proofreading
- Any required internal approvals or signatures

For the cost proposal, the milestones might include:

- High level budget prepared
- Budget templates prepared, including tailored templates for partners if needed
- First draft budget completed and circulated
- First draft budget narrative completed and circulated
- Feedback from the proposal team received
- Feedback incorporated and revised drafts completed and circulated
- Budget and budget narrative updates (as the project design changes or becomes clearer)
- Supporting documentation compiled
- Internal cost reviews
- Packaging and compliance checks
- Final proofreading of the budget narrative
- Any required internal approvals or signatures

For recruitment:

- Job descriptions for key personnel drafted and posted (online or in local media, as applicable)
- Candidate screening and interviews
- Reference checks and salary verifications
- Candidate selection offers made to top candidates
- Candidates confirmed
- Required documentation received (such as biographical data form and certifications on USAID proposals)
- CVs formatted and finalised for inclusion in the proposal

For partner coordination:

Partner selection finalised (if this was not done during the preparation period)

- Teaming agreements developed and signed by both parties
- Partner packed developed and shared
- Technical inputs received from partners as needed
- First draft partner budgets received
- Feedback provided on draft budgets
- Revised budgets received
- Supporting documentation received

If people are traveling to support the proposal process, you can include their travel dates. You should also flag any public holidays.