

Proposal & Report Design Best Practices Checklist

Use these questions to review report and proposal forms for purpose, simplicity, and equity.

Purpose & Decision Use

- Does this question inform a decision?
- Are we asking for data we don't meaningfully analyze or use?
- Is the level of detail asked proportional to the grant size?
- If removed, would our decision materially change?
- Is the word/character limit proportionate to the importance of the question?

EASY EDITS YOU CAN MAKE TODAY

- ✓ Delete one question you don't use for decision-making
- ✓ Replace one compliance-oriented question with a learning-oriented one
- ✓ Rewrite one question in plain language

Simplicity & Accessibility

- Is each question written in plain, accessible language?
- Would someone outside philanthropy understand this prompt?
- Are multiple questions being asked within one prompt?
- Is this information available publicly elsewhere (website, ProPublica, GuideStar)?
- Is this question already asked in another section?
- Can this be pre-populated for returning grantees/applicants?
- Can attachments replace redundant re-entry?

Equity & Power



- Can this question be reframed to have a learning focus rather than a compliance focus?
- Does this question use person-centered language?
- Is there guidance (not requirements) for word or character counts?
- Are bullet point answers encouraged?
- Can this question be reframed to be strengths-based rather than deficits based?
- Would an alternative format (existing project brief, video clip, audio clip, virtual meeting, etc.) provide us with the same information in a way that's easier for the grantee?

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