Before You Write the *Proposal*

How to get your organisation ready for the money you are about to ask for. A working guide for nonprofits in Africa.

Three things that must be true before you open a blank document

GATE ONE	→	GATE TWO	→	GATE THREE
Your organisation		The problem		The donor

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WHAT THIS IS

A guide about the work that happens before the writing.

Most proposal training starts at the blank page. This one starts two months earlier, in the room where you decide whether your organisation is in any condition to ask.

WHO IT IS FOR

You run or work inside a nonprofit in Africa. You have real programmes and real relationships in the communities you serve. You have applied for funding and lost, or you are about to apply for the first time and you can feel that something is missing.

You do not need a fundraising department to use this. You need a notebook, two quiet afternoons and the willingness to be honest about what your organisation cannot currently prove.

WHAT IT WILL DO

By the end you will know exactly which documents a donor will ask you for, what they check when they check them, how to establish the facts of a problem before you design a solution, and how to research a funder properly.

You will also have three worksheets you can take into a staff meeting and use immediately.

HOW TO USE IT

Read it once through. Then go back to Part Four and work the checklists with your team. The guide is short on theory on purpose. Everything in it came out of proposals I have written, reviewed and watched fail across Nigeria and West Africa.

This guide covers preparation. It does not teach you to write the twelve sections of a proposal. That is a separate body of work and it comes later, after the ground is firm.

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What is inside

START HERE IF YOU ARE IN A HURRY

Read the opening, then go straight to Part Four. The three worksheets are the part of this guide that actually changes what happens in your organisation next week.

The most expensive mistake in proposal writing is starting *too early.*

That sounds strange. Most people assume the mistake is starting too late. Tight deadlines. Rushed writing. Thin arguments. Those are real problems and I have watched them cost good organisations real money.

But there is a different kind of rushing. It happens earlier in the process and it does more damage. It is the rush to write before you know what you are writing about.

I see it every year. A call comes out. Someone forwards it to the WhatsApp group at nine in the evening. By morning a draft exists. The draft is confident. It names a community, it names a number of beneficiaries, it proposes a solution. Nobody in the organisation has been to that community in two years. The registration certificate expired in March. The last audited account is from three years ago and shows a deficit nobody has explained.

The proposal will be rejected. The organisation will never be told why.

> The proposal is a product of preparation. If the preparation is thin, the proposal will be thin, no matter how long you spend at the keyboard.

I know this from both sides of the table. My first proposal was rejected and I received no feedback at all. Just silence. Since then I have written proposals, reviewed proposals, and sat with organisations across Nigeria and West Africa picking through the wreckage of applications that should have worked. The pattern almost never changes. The writing was not the problem. The organisation was not ready to be written about.

Readiness is not a mood. It is a set of facts that either exist or do not exist in a filing cabinet, in a community, and in a funder's published strategy. This guide is about establishing those facts.

Three things must be true before you open a blank document.

Everything in this guide sits behind one of three gates. You can pass through them in any order. You cannot skip one and expect the proposal to hold.

THE READINESS SEQUENCE

01

You know your organisation

Not from memory. From the documents, the accounts, the board minutes and an honest account of what you cannot prove.

02

You know the problem

Established through research, not observation. You can say what causes it, who it affects, and how you know.

03

You know the donor

Their strategy, their grant sizes, their eligibility rules, their language, and the projects they actually funded last year.

ONLY THEN

You write the proposal.

Everything you need is now a fact you can cite rather than a claim you have to make.

Notice what the sequence does to your writing. When the three gates are closed behind you, the background section writes itself from your needs assessment. The capacity section writes itself from your documents. The alignment section writes itself from the donor's own strategy. The proposal becomes an act of assembly rather than an act of invention.

When the gates are open, you invent. And a reviewer who reads forty proposals a week can tell the difference in a paragraph.

PART ONE

Know your *organisation*

The first question every proposal answers is not what you want to do. It is who is asking. Most organisations answer that question from memory. Donors answer it from documents.

Who is applying, really?

Not the name on the letterhead. Who are you, in a form a stranger can verify?

Many people assume they know their own organisation well enough to write about it. You founded it. You have run it for six years. You could describe it in your sleep. But the proposal writer needs more than memory. You need a detailed, current and honest picture of your track record, your capacity, your strengths and your limitations.

Here is the test I use. Take four claims you would naturally make about your organisation in a proposal. Something like these.

We have worked in this community for eight years.

We have reached over four thousand young people.

We have strong relationships with the local government.

We have managed donor funds responsibly.

Now for each one, name the document that proves it. Not the person who remembers it. The document. A signed memorandum of understanding. An annual report with numbers in it. A previous grant report. An audited account.

If you can produce the document for all four, you are in better shape than most organisations I work with. If you cannot produce it for two of them, you have just found the real reason your last application failed, and it had nothing to do with your writing.

> Specificity is credibility. Vagueness is suspicion. A reviewer has no way to tell an honest claim from an inflated one, so they treat unevidenced claims the same way: they discount them.

This is not cynicism on the donor's part. Put yourself at their desk. They have never met you. They may never visit your community. They are reading three hundred applications and every single one says the applicant is experienced, committed and community based. The only thing that separates you from the other two hundred and ninety nine is what you can evidence.

The twelve documents

Before you begin writing any proposal, these should be assembled, reviewed and current. Not findable. Assembled, in one folder, read by someone who checked the dates.

DOCUMENT	WHY IT MATTERS	WHERE IT GOES WRONG
Certificate of incorporation or registration	Proves you are legally registered and eligible to receive grants. Most donors require it before anything else.	Expired registration. The wrong registered name used in the proposal.
Audited financial statements Last two to three years	Demonstrates financial health and accountability. Donors check whether your income matches the grant history you claim.	Accounts never audited. Deficits left unexplained. Statements more than two years old.
Strategic plan	Shows the organisation has a direction and that this project sits inside it.	No current plan. The project appears unrelated to your stated focus.
Annual reports	Evidence of what you actually delivered, who you reached, and what changed.	No reports at all. Reports that list activities but never show outcomes.
Organisational chart	Demonstrates governance and management structure. Confirms who is responsible for what.	No board listed. A founder managed organisation with no separation between governance and management.
Staff CVs for key positions	Shows the team has the qualifications and experience to deliver what you are proposing.	CVs that do not match the project scope. A proposed project manager with no relevant experience.
Financial management policy	Confirms you have systems for managing donor funds responsibly.	No policy. Or a policy that exists but was never approved by the board.

Continued overleaf.

DOCUMENT	WHY IT MATTERS	WHERE IT GOES WRONG
Safeguarding or child protection policy	Required by most donors funding work that touches children or vulnerable groups.	The policy does not exist. Or it exists and no member of staff has been trained on it.
Procurement policy	Shows how you manage purchasing and contracting so that fraud is caught rather than discovered later.	No policy. Every purchasing decision made by one person with no oversight.
Previous grant reports	Evidence of a track record with other donors. Proof you deliver and account for what you deliver.	No copies kept. Reports that show poor performance with no explanation attached.
Needs assessment reports	Evidence that your programme design came from community data rather than assumption.	No assessment ever conducted. Or one was conducted and never written up.
Letters of support and partner agreements	Shows collaborative relationships and legitimacy in the geography you are claiming.	Nothing on paper linking you to the community or to any partner in the target area.

THE PATTERN WORTH NOTICING

Read the third column again. Almost none of those failures are about capability. They are about maintenance. The policy was written and never approved. The certificate was renewed and never filed. The assessment was conducted and never typed up.

Funding is lost in the gap between doing the work and being able to show the work. That gap is administrative, and administrative gaps can be closed in a quarter if somebody owns them.

One more thing about this list. Do not assemble it for a specific call. Assemble it once, keep it current, and you remove between three and five days of panic from every application you will ever submit.

Running the audit

Set aside one morning. Put the twelve documents on a board with three columns and be strict about which column each one lands in. The board looks like this.

THE DOCUMENT BOARD

Current	Exists but stale	Does not exist
In the folder. Signed. Dated within the window a donor would accept.	You have it. It is out of date, unsigned, unapproved or unpublished.	Never written. Never conducted. Never kept.
Nothing to do. Note the expiry date in a calendar so it does not quietly move into column two.	Cheapest column to fix. Most of these are a board resolution or one visit to an office away from done.	This column decides which calls you are eligible for this year. Treat each item as a project with an owner and a date.

THREE RULES FOR THE MORNING

01 **One person owns each document.** Not a department. A named person with a date. Documents owned by everybody are owned by nobody and that is how a registration certificate expires.

02 **Nothing goes in column one on somebody's word.** Open the file. Look at the date. I have sat in too many meetings where a policy was confidently declared current and nobody could produce it.

03 **Column three is a plan, not a confession.** You are not listing failures. You are listing the work that stands between your organisation and the funding it wants. That is a useful thing to have on paper.

Most organisations I have done this with find between four and seven items sitting in columns two and three. None of them are unfixable. Almost all of them were invisible until somebody drew the board.

Due diligence

Scoring is not the only thing that decides whether you get the money. Many donors run a second process alongside it, and a proposal can win on merit and still lose here.

You submit. Your technical score is strong. The panel likes the design. And then a grants officer opens a separate file and starts checking whether your organisation is safe to send money to. Here is what they examine.

For many donors the outcome is binary. You pass and the grant proceeds, or you fail and the funding is withdrawn even though the proposal scored highly.

CATEGORY	WHAT THE REVIEWER IS LOOKING FOR
Legal status	Registration documents, certificate of incorporation, tax compliance certificates where they apply. You must be registered and in good standing where you operate.
Financial health	Audited statements for the last two to three years. Whether income matches the grant history you claimed. Whether a deficit suggests instability. Whether large liabilities went unexplained. Whether a recognised firm did the audit.
Governance	Your constitution, evidence of a board that functions, minutes of meetings. They are testing whether governance and management are genuinely separate, and whether the board exercises real oversight.
Financial systems	The financial management policy, the procurement policy, any internal audit reports. The question is not whether your current staff are trustworthy. It is whether the system would catch a problem if the staff changed.
Safeguarding	Policies for any work involving children or vulnerable groups. Most major donors treat this as a minimum that cannot be waived. The policy must be current, board approved, and staff trained on it.
Track record	Reports from previous grants and reference contacts at previous donors. Did you deliver what you promised, and report accurately when you did not?
Conflict of interest	Whether any board member, staff member or close associate has a financial or personal interest in the project that could compromise a decision.

> The gaps they find are almost always the ones you already knew about.

I want to be direct, because hoping is the strategy I see most often and it is the one that works least.

If your most recent audit is slightly old, address it before you submit. If your board has not met formally in a year, call a meeting and minute it. If your safeguarding policy was drafted by a consultant and nobody has read it since, put it on a board agenda and train your staff on it.

Donors conducting due diligence are methodical. That is the entire job. They are working through a list, and the item you are quietly worried about is on their list too.

The order this changes

Once you understand due diligence, the twelve documents stop being housekeeping. They become the precondition for receiving any funding you win.

That is why this guide puts your organisation first and the proposal last. A brilliant proposal from an organisation that cannot pass due diligence is not a near miss. It is wasted work.

A WAY TO THINK ABOUT IT

Scoring asks: is this a good project? Due diligence asks: is this an organisation we can safely transfer money to, and will we be comfortable explaining that decision to our own auditors in three years?

Both must be answered yes. Only one of them is answered by your writing.

WHAT TO DO THIS QUARTER

- [ ] Get the most recent audit signed off and filed, whatever it costs to finish it.
- [ ] Hold a board meeting. Minute it properly. File the minutes.
- [ ] Take every unapproved policy to that meeting and have it approved in one sitting.
- [ ] Run a short staff session on the safeguarding policy and keep the attendance sheet.
- [ ] Write to two previous donors and ask if they would act as a reference.

None of that requires funding. All of it moves you from ineligible to eligible, which is a larger move than any improvement to your prose.

SWOT, done honestly

Two hours. Four boxes. The value is entirely in whether you are willing to write the true things in the second box.

SWOT stands for strengths, weaknesses, opportunities and threats. The first two look inward at your organisation. The second two look outward at the environment you operate in. Most organisations have done one. Very few have done one they would be willing to show a stranger, because the weaknesses column tends to fill up with things like *limited resources*, which is true of every organisation in the sector and therefore tells you nothing.

INWARD

Strengths

Internal. Working for you.

An experienced team. A reputation in the target community. A programme model that has been run three times. Eight years of presence in the geography.

Weaknesses

Internal. Working against you.

No finance officer. High staff turnover. No track record in the sector you are proposing. A board that has not met in eleven months.

OUTWARD

Opportunities

External. Can be used.

A donor opening an office in your state. A policy change that creates room for your work. A partner seeking a local arm.

Threats

External. Can undermine you.

Political instability where you operate. Inflation that makes your budget projections unreliable within a year.

The examples in each box are illustrative. Yours should be specific enough that somebody outside your organisation could verify them.

What each box is actually for

A SWOT is not a reflection exercise. Each box has a job in a specific part of the proposal you have not written yet.

BOX	WHERE IT GOES IN THE PROPOSAL	WHAT IT EARNS YOU
Strengths	Organisational capacity section. Track record. The case for why you rather than somebody else.	Points on the capacity criterion, which is worth between fifteen and twenty percent with most major donors.
Weaknesses	Nowhere directly. They tell you what to fix before submitting, and what to staff or partner around.	They stop you from claiming something a reference check will contradict.
Opportunities	Rationale and sustainability. Why now. Why this project can outlive the grant.	A sustainability argument with something real in it instead of a paragraph of intentions.
Threats	Risk section and assumptions. Named risks with named mitigations.	Credibility. A proposal with no risk section reads as a proposal written by someone who has not implemented much.

A COMPOSITE EXAMPLE

The organisation: a youth skills nonprofit, seven years old, operating in two states. Illustrative and assembled from several organisations I have worked with, not a single real one.

The honest weakness: they had never managed a grant larger than twelve thousand dollars, and the call they wanted to answer had a floor of eighty thousand.

What the SWOT changed: they stopped writing themselves as the lead applicant. They approached a larger organisation already known to that donor and proposed themselves as the implementing partner for the two states they knew. They wrote their community depth into the partnership and left the grant management burden with the partner.

The result: they were in the consortium and delivering within the year, which put a grant of that scale on their record for the first time. The weakness did not disappear. It was routed around on purpose, because somebody wrote it down.

That is the argument for honesty in the second box. A weakness you have named is a design constraint. A weakness you have hidden is a reference check waiting to happen.

PESTLE: reading the environment

SWOT looks at you. PESTLE looks at the ground you are proposing to stand on. Six dimensions, each one capable of killing a well designed project.

THE SIX DIMENSIONS

P **Political**	E **Economic**	S **Social**	T **Technological**	L **Legal**	E **Environment**
Who holds power and what they want	What your budget will be worth later	Who decides things inside a household	What actually works where you will work	What you must comply with in each country	Weather, terrain and access windows

Each dimension produces one of two things: a design change you make now, or a risk you name in the proposal with a mitigation attached. Nothing else. If a scan produces neither, it was not a scan. It was a conversation.

HOW EACH ONE LANDS IN WEST AFRICA

DIMENSION	WHAT TO ASK, AND AN EXAMPLE OF WHAT IT CHANGES
Political	Are there elections, policy shifts or new government priorities in your window? A change of government can move health policy priorities, and a maternal health project written to align with the old national programme suddenly aligns with nothing.
Economic	What will your money be worth by year two? High inflation in Nigeria across 2023 and 2024 cut the real purchasing power of budgets held in naira. Projects with no contingency delivered less than they promised.
Social	Who makes decisions in the household you intend to reach? Where male leaders control household decisions, a women's economic empowerment project has to engage them from the first week, not in month nine when uptake is low.
Technological	What is actually available on the ground? In communities with high mobile penetration but unreliable internet, a health intervention should run on SMS rather than an app. Projects fail on this more often than anyone reports.
Legal	What rules apply where you will operate? Registration and operating requirements differ between Ghana, Nigeria and Sierra Leone. A project across three countries has to comply with three frameworks, and the donor will check.
Environmental	When can you physically reach people? Field activities in the Niger Delta must plan around rainy season flooding that can cut communities off for weeks. Build it into the work plan or watch the work plan slip.

Turning a scan into proposal text

A PESTLE scan is only worth the two hours if it changes what you write. Here is the conversion I use. Take each finding and put it through one question: does this change the design, or does it become a risk?

WORKED THROUGH

Finding: the two target communities are cut off by flooding for roughly six weeks between August and September.

Design change: all field training is scheduled between November and June. The August and September window is used for data cleaning, reporting and remote follow up by phone.

Named risk: flooding extends beyond the expected window. Mitigation: two community facilitators are recruited from inside each community and can continue basic activity without travel from the office.

What the reviewer sees: an applicant who has implemented in this terrain before. That impression is worth more than a page of claims about experience.

This is the difference between an organisation that knows its environment and one that has read about it. Reviewers can tell, because the specific detail only comes from people who have been rained on.

Mapping who matters

A stakeholder is anyone who has an interest in your project, is affected by it, or has the power to help it or stop it. Map them before you write and three sections of your proposal get stronger at once.

CATEGORY	WHO IS INCLUDED AND WHY THEY MATTER
Beneficiaries	The people the project directly serves. Their needs, preferences and perspectives belong at the centre of the design, not in a consultation paragraph added at the end.
Implementers	Your organisation and any partners delivering the work. Mapping who does what prevents duplicated effort and prevents two partners both assuming the other will do the monitoring.
Influencers	Government ministries, community leaders, religious institutions and anyone whose support or opposition can decide whether the project works at all.
Funders and partners	Current donors, other funders, and the organisations that will carry something forward after your grant ends. This is where a real sustainability argument comes from.

Then place them on the grid

Once you have the list, assess each one on two dimensions: how much interest they have in the project, and how much power they hold over whether it succeeds. Those two questions produce four very different engagement strategies.

POWER AND INTEREST

Keep satisfied High power, low interest National ministry officials. Regulatory bodies. Inform them without burying them.	**Manage closely** High power, high interest The lead ministry. A major funder. The chief who can mobilise or block participation.
Monitor Low power, low interest Peripheral actors. Minimal engagement unless circumstances change.	**Keep informed** Low power, high interest Community members. Beneficiary groups. Real participation, not a courtesy visit.

Power

Interest

The quarter that changed the answer

JANUARY

A community health nonprofit, nine years old. Three full time staff and eleven volunteers. Two thousand households reached with malaria prevention in a year. They had applied for funding eleven times in four years and won two small grants. Nine rejections, no feedback on any of them.

We drew the document board. Column three had five items. No strategic plan. No procurement policy. No safeguarding policy, on a programme reaching children through their mothers. No needs assessment. No copies of the reports they had already submitted.

FEBRUARY

Nothing glamorous happened. The director wrote a strategic plan over three weekends. Seven pages. Two priorities and a geography. Enough.

The board met for the first time in fourteen months and approved three policies in one sitting, all edited to match how the organisation actually worked. The minutes were filed that week. A resolution nobody minuted did not happen, as far as a grants officer is concerned.

MARCH

Nine days in four communities. Focus groups with mothers. Interviews with clinic staff and a traditional birth attendant. A household survey.

Bed net coverage was not the binding problem. Nets were in most households. They were being used to fence vegetable gardens, because a garden feeds a family now and malaria is a risk later. That finding reorganised the whole proposal.

APRIL

They submitted, citing their own field data. The capacity annex held eleven documents. They were funded, for roughly six times more than anything they had managed before.

WHAT ACTUALLY CHANGED

A composite, assembled from several organisations I have worked with in Nigeria and Ghana. The sequence is real.

Not the quality of their work, which was always good. What changed was that in April a stranger reading their file could verify things that in January only the director knew. The turnaround cost one board meeting, three weekends of writing and nine days in the field. No consultant. No funding.

PART TWO

Know the *problem*

A needs assessment establishes the facts of a problem before a solution is designed. Before you can convince a donor that a problem exists, you have to convince yourself. This is how you do that.

Why this is not optional

A project fails in one of two ways. It is executed badly, or it was designed to solve a problem that was not the problem. The second kind is more expensive and far more common.

The first kind you can see coming. Budgets slip. Staff leave. Activities run late. Everyone in the sector knows what a badly executed project looks like and there are systems for catching it.

The second kind looks healthy all the way through. Activities happen on schedule. Reports are submitted on time. Beneficiary numbers are met. And at the end, nothing in the community has changed, because the intervention was aimed at a symptom or at a cause that was not operating.

> A needs assessment is not bureaucracy. It is how you find out what the problem actually is.

I want to show you two examples before any theory. Both are real. Both are the kind of thing that only surfaces when somebody goes and asks.

THE TWO ROUTES FROM OBSERVATION TO PROJECT

You observe → You assume the cause → A project that is busy, on time, and changes nothing.

You observe → You establish the cause → A project that is smaller, cheaper, and works.

EXAMPLE ONE

The boreholes that could not be sunk

Igugu is a small town in Enugu State. The water problem there is real. The obvious solution is impossible. You would only know that if you asked.

The soil around Igugu has very little clay in it. It is mostly sandy. That makes it extremely difficult to sink a well or a borehole, and geological studies have confirmed that functional boreholes cannot be established in the town. The people buy their water from outside the community.

Now imagine an organisation arrives. They see women walking long distances for water. They see money leaving poor households to buy something that falls out of the sky elsewhere. They are moved by it, and they should be. They design a project to sink a borehole.

They mean well. The need is genuine. The project will fail, and it will not fail because of poor execution. It will fail because the solution was designed before the problem was understood.

SAME OBSERVATION, TWO CONCLUSIONS

WITHOUT ASSESSMENT	WITH ASSESSMENT
Observation: women walk far for water. Assumed cause: no water point nearby. Solution: sink a borehole. Outcome: a dry hole and a closed file.	Observation: women walk far for water. Established cause: the geology rules out groundwater extraction in this town. Solution: rainwater harvesting, storage, or a piped scheme from outside the town.

The second column is not a cleverer idea. It is the same idea after two days of asking. A conversation with the local water board, one afternoon with older residents who remember previous attempts, and a search for existing geological survey data would have produced it.

Notice also what the second column does for your proposal. It lets you write a background section that explains why the obvious intervention does not work here. A reviewer reading that immediately understands they are dealing with an organisation that knows the place.

EXAMPLE TWO

The marks were not about identity

In some West African communities, facial incisions are made on infants. To an outsider this reads as a hygiene and child protection issue. The obvious response is a sensitisation campaign. The obvious response would largely fail.

A thorough needs assessment often reveals something different. In many of these communities the marks have little to do with tribal identity. They are spiritual practices used to protect infants. The thing driving the practice is parental fear about whether the child will survive, not cultural pride.

Sit with that for a moment, because it changes everything. If the driver is fear of child death, then a campaign explaining the health risks of the incisions is arguing with a parent about a risk they are already accepting knowingly, in exchange for protection from a risk they consider larger.

> You are not competing with ignorance. You are competing with a solution the community already has.

With that knowledge, the most effective intervention might be something quite different: improve child health services so that children fall sick less often. Reduce the fear and the practice loses its function. A campaign aimed at the wrong root cause will produce very little lasting change, and it will produce it expensively.

SYMPTOM, ASSUMED CAUSE, ACTUAL CAUSE

Visible: infants carry facial incisions

↓ ↓

ASSUMED CAUSE	ACTUAL CAUSE
Cultural attachment to tradition.	Parental fear that the child will die.
Response: awareness campaign about the health risks of the practice.	Response: strengthen child health services so the fear has less to feed on.

Both of these examples share one feature. The organisation that gets it wrong is not lazy or unkind. They are moving fast on a real problem with genuine concern. Speed is the thing that hurt them.

What an assessment actually produces

Five things, and every one of them lands in a specific part of the proposal you will write later.

01 **Evidence for your background section.** The statistics, the testimonies and the field data that make your problem statement concrete rather than general. This is the difference between *malnutrition is a serious problem in the north east* and a figure you collected yourself in five named communities.

02 **Clarity about root causes.** Which causes your project will address and which fall outside its scope. Being explicit about what you are not solving is a sign of a serious designer, not a weak one.

03 **Validation of your solution.** Evidence that the approach you are proposing is likely to work in this place, with these people.

04 **Community insight.** An understanding of what the target population values, prefers and already does. This shapes how you design activities, and it is what keeps you from proposing something that will be politely accepted and quietly ignored.

05 **Baseline data.** The starting point against which your monitoring system will measure change. Without it you cannot honestly claim an outcome at the end, and reviewers know that.

THE REVIEWER'S ANGLE

Monitoring and evaluation is worth roughly ten to fifteen percent of the score with most major donors. A large share of proposals lose most of those points for the same reason: no baseline plan, so no way to prove the change they promise.

A needs assessment conducted before you write hands you the baseline for free. You already collected it.

There is one more thing it produces that nobody puts in a table. It produces conviction. When you have sat in four communities and heard the same thing from thirty people, you write differently. The hedging drops out of your sentences. Reviewers feel that even when they cannot name it.

The four stages

A needs assessment moves through four stages. You can run a small one in nine days with volunteers, or a large one over three months with a research partner. The stages do not change.

01 Ideation

You have an idea about a problem. Right now it is an assumption, and it is the most dangerous thing in the room because it feels like knowledge.

02 Defining objectives

You write down exactly what the assessment must find out. One main objective and three to five specific ones. Vague objectives produce data you cannot use.

03 Methodology

Study design, location, population and sample, and how you will collect and analyse. This is the section a reviewer checks when deciding whether to trust your numbers.

04 Reporting findings

You interpret the data and say what it means. Three to five pages is enough. Undocumented research is not evidence.

The stage organisations skip is the second one. They go to the field with goodwill and a questionnaire somebody adapted from another project, and they come back with data that does not answer anything in particular.

THE NINE DAY VERSION

Two days defining objectives and building the tools. Five days in the field with volunteers. Two days writing it up. This is what a small organisation can do without external funding, and it is enough to carry a proposal.

THE THREE MONTH VERSION

A research partner, a larger sample, formal analysis and a published report. Worth it when you are entering a new geography or when the assessment itself can be funded as a first activity.

Both follow the same four stages. The difference is sample size and rigour, not sequence. Do not let the absence of the second version become a reason to skip the first.

Ideation: an assumption you must test

Ideation is where a project begins. You observe something, read a report, or a colleague tells you about a problem. The idea formed at this stage is an assumption. It says: I believe this problem exists, I believe I know why, and I believe I have an approach that could help.

That assumption must be tested before you invest further. Many failed projects were built on untested ideation by people who were certain they understood the problem.

> **A COMMON ONE**
>
> An organisation assumes a community lacks income because people lack skills. They design a vocational training programme and implement it well. Graduates finish with real ability.
>
> The binding constraint was never skills. It was market access. The training produced tailors and welders with no customers. A needs assessment would have surfaced that in days. The failed project surfaced it after twelve months and about eighty thousand dollars.

Defining objectives: the step nobody skips twice

Before going into the field, write down what the assessment is trying to find out. The main objective describes the purpose. The specific objectives break it into discrete questions.

> **WORKED EXAMPLE**
>
> **Main objective:** to establish the nature, prevalence and root causes of child malnutrition in five target communities in Borno State.
>
> **Specific objectives:**
>
> - To determine the proportion of children under five who are stunted or wasted.
> - To identify the dietary, behavioural and structural causes of malnutrition there.
> - To map the health and nutrition services available to families there.

Those objectives become the framework for your data collection tools. Their clarity determines the quality of everything you bring home.

Methodology

The plan for collecting the data and making sense of it. Four parts: design, location, sample, and analysis.

STUDY DESIGN

DESIGN	WHAT IT GIVES YOU
Cross sectional survey	Data from a population at one point in time. Establishes how widespread something is.
Descriptive study	A description of a problem or a population, without claiming to establish what causes what.
Participatory rural appraisal	Community mapping, seasonal calendars, preference ranking, focus groups. Strong where literacy is uneven and the community should shape the analysis.
Key informant interviews	Interviews with people who hold special knowledge. Clinic staff, teachers, market leaders, traditional birth attendants.

LOCATION AND SAMPLE

Be specific about location. The reviewer wants your data to come from the communities the project will serve, not a national database. Name them, name the boundaries, say how you selected them. The population is everyone affected. The sample is the subset you reach. Document how you chose it: random, purposive or stratified. An unrepresentative sample cannot describe the population, and a reviewer who spots that discounts every number you present.

TWO KINDS OF DATA

QUALITATIVE

Interviews, focus groups, literature. Tells you about experience, belief and perspective. It answers *why*.

QUANTITATIVE

Surveys, questionnaires, observation. Tells you about prevalence and frequency. It answers *how many*.

The best assessments use both. Quantitative tells you how many children are stunted. Qualitative tells you why their families do not feed them differently.

STAGE FOUR

Reporting findings

Write it in plain language. Interpret the data. Do not present tables and leave the reader to work out what they mean.

This is where most assessments lose their value. The fieldwork was good, the data is sound, and then somebody produces forty pages of tables with no argument in them. Nobody reads it. Nobody cites it. Within a year it cannot be found.

Say what the data means. If sixty percent of children in the target community are not attending school, say what that means for those children and for the community's trajectory over the next ten years. Then connect it directly to the solution you are proposing.

THE FIVE SECTIONS OF A USABLE REPORT

01 **Executive summary.** The key findings, in one page, for a reader who will not read further.

02 **Methodology.** What you did, where, with whom, and how you selected them.

03 **Findings by objective.** Take each specific objective in turn. Give the quantitative result and the qualitative insight that explains it.

04 **Conclusions.** What the findings add up to, including a clear statement of root causes.

05 **Recommendations.** What this means for project design.

> Even a three to five page summary is worth more than no documentation at all. It proves you went into the field before you went to your keyboard.

When a donor conducts due diligence, this is often the document that separates an organisation seen as evidence based from one seen as assumption based. In a competitive round that distinction is worth real money.

A HABIT WORTH BUILDING

Write the report within two weeks of leaving the field. Not because anybody is waiting for it, but because the qualitative insight lives in your memory and your memory has a shelf life. The notes will still be there in three months. The thing the woman said that reframed the whole problem will not.

Judging secondary data

When you do a desk review, not all data is equal. Put every source through four gates before you let it into your background section.

FOUR GATES

Currency	Credibility	Relevance	Consistency
How recent is it?	Who produced it?	Does it fit your place?	Does it agree?
Five years is the outer limit. Two to three for fast moving contexts.	Statistics offices, peer reviewed journals, UN agencies, major INGOs.	National figures rarely describe one district. Always go as local as the data allows.	If one study says sixty percent and another says twenty, investigate before citing either one.

A source that fails any one gate does not go in the proposal.
One weak citation invites a reviewer to doubt the rest of your evidence, including the good parts.

WHAT COUNTS AS LOW CREDIBILITY

Uncited blog posts. Advocacy documents with no methodology attached. Data produced by an organisation with a financial interest in the result. Figures that circulate widely in the sector but whose origin nobody can name.

That last category is worth dwelling on. Every sector has a number that everybody quotes and nobody sourced. If you cannot trace a figure to the study that produced it, do not use it. A reviewer who happens to know the figure has been discredited will treat your whole background section as unchecked.

A PRACTICAL RULE

Keep a simple citation sheet while you research. Source, year, producer, the specific figure, and the page. It takes a few extra seconds per source and it saves you a day when you are assembling the background section under deadline and cannot remember where a number came from.

When you cannot reach the field

Sometimes the deadline is in eleven days and primary research is impossible. Two honest options, one dishonest one.

The dishonest one is to write as though you have evidence you do not have. It fails at due diligence rather than at scoring, which means it fails after you have already spent the effort.

Option one: a rapid desk review

Pull together existing data from statistics offices, ministry reports, previous evaluations, academic research and credible NGO publications. If you have worked in the area for years, your own programme data belongs here too and is often the strongest material you have.

A careful desk review with clear citations can establish a solid evidence base quickly. Apply the four gates from the previous page to everything you use. One that cites weak sources is worse than none.

Option two: make it the first activity

Put the needs assessment into the activity plan, the work schedule and the budget. Then say so in the narrative: detailed design will be refined on the basis of the baseline findings.

Many donors accept this, particularly for longer projects or a geography that is new to you. Some will fund a standalone assessment as a precursor to a full proposal. Presenting it as a planned activity is honest, credible, and reads as rigour rather than weakness.

HOW TO PHRASE IT

A baseline needs assessment will be conducted in the first eight weeks across the five target communities, using the household survey and focus group methods in Annex C. Design for Outputs 2 and 3 will be finalised after the baseline findings are validated with community stakeholders and the state ministry.

That tells a reviewer three things. You know what you do not know. You have a method for finding out. And you will let the findings change the design.

PART THREE

Know the *money*

The donor is the most important reader of everything you write. Know them before you write a single word for them, because the alternative is writing a good proposal for the wrong person.

Understanding your donor

Four things to establish before you write. Each of them can disqualify you on its own, which makes this the cheapest hour you will spend on any application.

01 **Their strategic priorities.** Every donor works inside a published framework that defines what they fund, where, and what outcomes they want. Read it. Then ask yourself honestly whether your project aligns. If the answer is not clearly yes, do not apply. A proposal squeezed into a priority it does not fit is visible from the first page.

02 **What they actually funded.** This is the most useful research you can do. Look at three to five funded projects similar to yours. Notice the scale of the budgets. Notice the language. Notice how much community participation they describe and in what terms. Let that shape how you write.

03 **Their guidelines and format.** Page limits. Word counts. Required sections. Budget templates. If the guidelines ask for a gender analysis section, include one. If anything is unclear, contact the programme officer before submitting rather than guessing.

04 **Grant levels and eligibility.** Many donors have minimum and maximum grant sizes. Many specify organisation type, years of operation, or a minimum annual turnover. Read these carefully. If you do not meet them, do not apply. Applying anyway costs you three weeks and teaches you nothing.

Being known before you submit

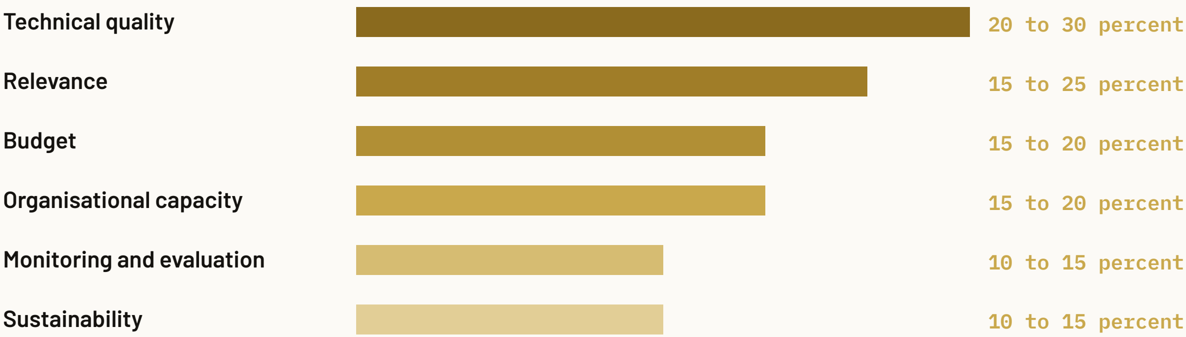
The organisations that secure funding consistently are not only good writers. They are known to their donors before the proposal arrives.

Attend the pre application sessions donors host. Follow up afterwards with a short email introducing your organisation. When a proposal is unsuccessful, request feedback if the donor offers it, and read the feedback as information rather than as a verdict. None of this guarantees anything. All of it changes the odds.

What reviewers actually score

Most major donors score against a structured set of weighted criteria. Knowing the weights before you write is one of the most practical things you can do with an afternoon.

TYPICAL WEIGHTING, MAJOR COMPETITIVE CALLS



CRITERION	WHAT REVIEWERS CHECK	WHERE APPLICANTS LOSE THE POINTS
Relevance	Does the project address the donor's stated priorities? Is the problem well established?	Vague problem statements. A weak connection to the thematic focus.
Technical quality	Is the design sound? Are objectives specific and measurable? Does the logic hold together?	Objectives that do not match the background. Activities that do not connect to objectives.
Organisational capacity	Have you delivered similar work? Do you have the systems and the team?	No track record cited. Team profiles missing or mismatched to the scope.
Budget	Are the costs realistic and consistent with the activities described?	Costs that cannot be justified. Budget lines with no matching activity.
Monitoring and evaluation	Can the project measure what it claims? Is there a baseline plan?	Vague indicators. No data collection plan. The whole section in one paragraph.
Sustainability	Will the results outlast the grant?	Generic claims. No concrete plan. No named partner or government linkage.

The volume problem

A major donor running a competitive call may receive hundreds of applications, sometimes thousands. One programme officer may be responsible for a large share of them, under time pressure. The practical implication is simple: your proposal will initially receive a very short window of attention.

In the first pass a reviewer is not evaluating your idea. They are looking for disqualifiers. Does this organisation meet the eligibility criteria? Is the application complete? Does it comply with the format and page limit? Does the project sit inside the stated thematic area? Applications that fail any of those are set aside before the content is read.

> Write every section knowing that a tired, time pressed reviewer is your first audience. Make their job easy. Lead with the most important point.

What happens after shortlisting

After the initial scoring, shortlisted proposals go through a further phase that many applicants do not know exists. It may involve a review panel of technical experts who assess the shortlist against each other and make a collective recommendation. It may include reference checks with your previous donors or partners. For larger grants it may involve a site visit or a presentation from your team.

Some donors negotiate scope or budget before final approval. A proposal can be approved in principle with a reduced budget or modified activities. That is not a rejection. It is an invitation to show flexibility, and how you handle it shapes whether they come back next cycle.

The final decision sits with an approval committee. Timelines vary enormously, from three weeks for an emergency grant to twelve months for a large bilateral programme. Build that into your planning. An organisation with one application in flight is an organisation holding its breath.

WHAT THIS MEANS FOR PREPARATION

Two of the six scored criteria, capacity and sustainability, are decided before you write. They are decided by what your organisation has assembled, who it has relationships with, and what it can evidence. That is between twenty five and thirty five percent of the available score sitting outside the writing entirely.

Funding sources worth knowing

A starting map, not a complete one. The point is to know which doors exist before you spend a month on the wrong one.

SOURCE	FOCUS AND GEOGRAPHY	HOW TO ACCESS
USAID usaid.gov	Health, education, agriculture, governance, democracy. Active across the continent.	Grants.gov and country mission websites publish calls. Partnership with local organisations is common.
EU Delegations eeas.europa.eu	Development, human rights, environment, governance. Each Delegation publishes local calls.	Search the Delegation website for your country. The EuropeAid portal also lists international calls.
FCDO gov.uk/fcdo	UK bilateral funding. Strong focus on girls' education, climate, health and governance in East and West Africa.	Calls published on the website and through the UK development tender portal.
Ford Foundation fordfoundation.org	Inequality, civil society, human rights, arts and culture. Offices in Nigeria and East Africa.	Letters of inquiry through the website. Relationships with programme officers matter.
Mastercard Foundation mastercardfdn.org	Youth employment and education across Africa, with a focus on skills and financial inclusion.	Open calls on the website. Also partners with selected implementing organisations.
Tony Elumelu Foundation tonyelumelufoundation.org	African entrepreneurship and small business development. The annual programme funds thousands.	Annual application cycle published on the website. Open to African entrepreneurs and enterprises.

Continued overleaf.

FUNDING SOURCES, CONTINUED

SOURCE	FOCUS AND GEOGRAPHY	HOW TO ACCESS
Open Society Foundations `opensocietyfoundations.org`	Human rights, justice, governance, transparency. Active across Africa.	Open calls and direct outreach. Relationships with programme officers are important.
African Development Bank `afdb.org`	Economic development, infrastructure, private sector, agriculture, climate.	Works primarily through governments. Civil society access runs through the Bank's engagement platform.
The Global Fund `theglobalfund.org`	HIV, tuberculosis and malaria.	Sub grants through Country Coordinating Mechanisms. Civil society has a formal role in country level governance.
fundsforngos `fundsforngos.org`	Aggregates grants relevant to nonprofits globally, with strong Africa coverage.	Free subscription to grant alerts by sector and geography.
Devex `devex.com`	Development sector news and jobs. Also publishes calls from major donors.	Free and paid tiers. Useful for tracking bilateral and multilateral calls.

HOW TO USE A LIST LIKE THIS

Do not apply to all of them. Choose two that genuinely fit what you do, and spend the next six months getting known to those two. Read their strategies. Attend their sessions. Study what they funded last year.

An organisation that has researched two donors properly will outperform an organisation that has shotgunned eleven applications, every time, and with far less work.

ONE CAUTION ABOUT AGGREGATORS

Alert services are useful for discovery and dangerous for strategy. A weekly email of forty open calls creates a feeling of opportunity and a habit of chasing. Use them to find the two or three calls that fit your published priorities. Ignore the rest without guilt.

Knowing the landscape

Competitive analysis is not only about avoiding duplication. It is how you decide what your proposal is going to be about.

Donors are making choices. When a funder receives fifty proposals on youth unemployment in urban East Africa, they want the one that best fits their priorities, shows the most credible delivery capacity, and offers the most compelling approach. Knowing what everyone else does is how you sharpen your position.

FOUR QUESTIONS

01 **Who else is working on this problem in this geography?** Name the organisations. Know their approaches. If you cannot name three, you have not looked.

02 **What have similar projects achieved?** Use their results to inform your theory of change and your impact claims. Cite them. A proposal that engages with what has already been tried reads as serious.

03 **What gap does your project specifically address?** The gap is your position. Make it explicit rather than leaving a reviewer to infer it.

04 **How is your approach different or better?** Articulate your specific contribution in a sentence. If you cannot, the proposal does not yet have an argument.

POSITIONING, DRAWN

What is already being done in this place

Three organisations run vocational training. One runs a mentoring scheme. Nobody works on market linkage.

↓

YOUR POSITION

Graduates of existing programmes have skills and no customers. We connect them to buyers.

Stated in one sentence, in the background section, on page two.

WHERE TO FIND THIS

The state or district development plan. The ministry that coordinates your sector. The local NGO network or coordination forum, which exists in most states and is usually underused. Previous evaluations published by donors. And half an hour with two peer organisations, who generally know the landscape better than any document does.

PART FOUR

Do the *work*

Three worksheets and a plan. Take these into a staff meeting. Reading this guide changes nothing on its own. Working these pages with your team changes what you are eligible for.

Organisational readiness

Work through this honestly before your next submission. Any no is a gap to address before you submit, not after.

- [ ] We have a current certificate of incorporation or registration, and the name on it matches the name we use in proposals.
- [ ] Our audited accounts are no more than eighteen months old.
- [ ] Any deficit in those accounts has a written explanation we would be comfortable showing a funder.
- [ ] We have a current strategic plan, and the project we are about to propose sits inside it.
- [ ] We have a financial management policy that the board has formally approved.
- [ ] We have a procurement policy, and purchasing decisions are not made by one person alone.
- [ ] We have a safeguarding or child protection policy, if this project involves children or vulnerable groups.
- [ ] Our staff have been trained on that policy and we have the attendance record.
- [ ] Our board has met in the last twelve months and the minutes are filed.
- [ ] There is genuine separation between our governance and our management.
- [ ] We can demonstrate at least one previous grant successfully managed and reported on.
- [ ] We hold copies of the reports we submitted for those grants.
- [ ] Two previous donors or partners would act as a reference for us.
- [ ] The proposed project manager's qualifications match the project scope.
- [ ] We have conducted a needs assessment in the target community in the last three years.
- [ ] That assessment is written up in a document somebody outside the organisation could read.
- [ ] We have a signed agreement or letter of support from at least one partner in the target geography.
- [ ] No board member or staff member has an undisclosed interest in this project.

Donor research

Complete this for the target donor before writing a single word. A proposal written after this page is filled in is a fundamentally different document from one written without it.

DONOR NAME AND TYPE: BILATERAL, FOUNDATION, MULTILATERAL, CORPORATE

CURRENT STRATEGIC PRIORITIES RELEVANT TO THIS PROJECT: NAME THE SPECIFIC ONES

GEOGRAPHIC FOCUS, AND WHETHER YOUR TARGET AREA FALLS INSIDE IT

GRANT SIZE RANGE FOR THIS CALL, AND WHETHER YOUR BUDGET FITS INSIDE IT

ELIGIBILITY REQUIREMENTS, AND WHETHER YOU QUALIFY ON EVERY ONE

THREE PREVIOUSLY FUNDED PROJECTS SIMILAR TO YOURS: NAME THEM AND WHAT THEY FUNDED

SPECIFIC TERMINOLOGY THIS DONOR USES THAT YOU SHOULD ADOPT

SECTIONS THIS DONOR REQUIRES THAT DIFFER FROM THE STANDARD STRUCTURE

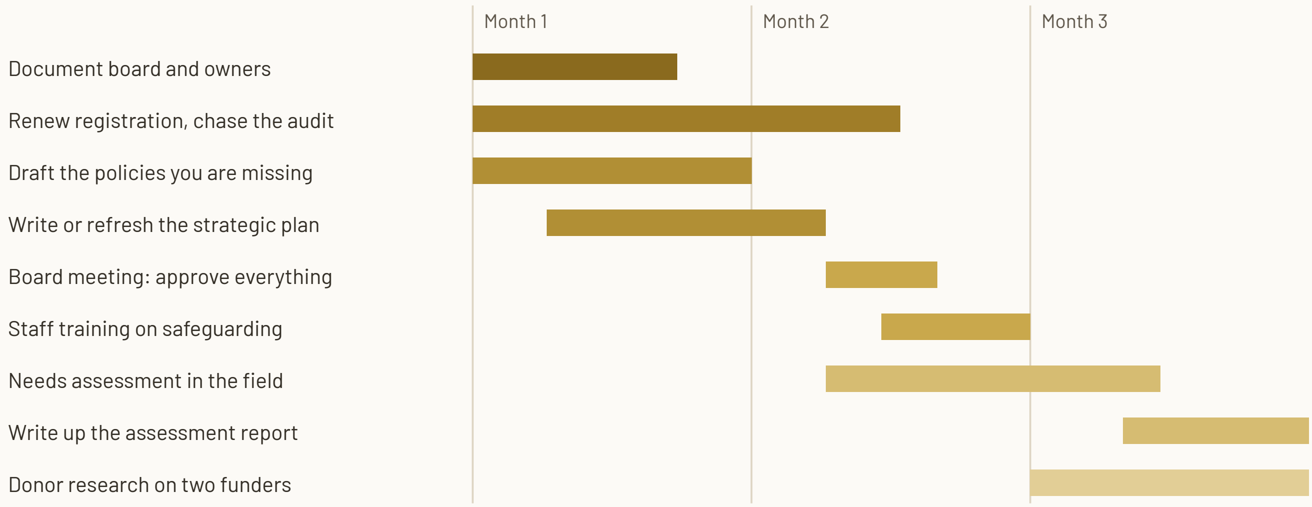
SUBMISSION DEADLINE, AND YOUR INTERNAL DEADLINE TWO WEEKS EARLIER

PROGRAMME OFFICER NAME AND CONTACT, IF AVAILABLE

The ninety day readiness plan

Almost everything in this guide can be done in one quarter, without funding, by an organisation of three people. Here is the order I would do it in.

NINETY DAYS



MONTH ONE

Draw the board. Assign owners. Start the two things that depend on other people and therefore take longest: the registration renewal and the audit. Both involve queues you do not control, so start them on day one.

Then begin drafting the policies. Templates exist. Adapt them to how your organisation genuinely operates rather than copying a model you will never follow.

MONTH TWO

Finish the strategic plan. Seven honest pages beat forty borrowed ones. Then hold one board meeting and approve every outstanding policy in a single sitting. Minute it. File the minutes the same week.

Begin the needs assessment. Define your objectives before anybody travels.

MONTH THREE

Finish the fieldwork and write the report while the conversations are still fresh. Run the staff training on safeguarding and keep the attendance sheet.

AND THEN

Pick two funders. Complete the donor research worksheet for both. You are now in a materially different position from the organisation you were in January, and you have not written a proposal yet.

Find out where you actually stand

This guide gave you the checklist. The next question is harder: across everything your organisation does, where are the real weaknesses, and which ones matter most right now?

I built a free assessment that answers that. It covers twenty seven areas of organisational capacity across three domains, scored against a five level rubric. It takes about forty minutes with your team in the room, and it is worth doing with the team rather than alone, because the disagreements are where the useful information lives.

FREE, NO SIGN UP

The Organisational Capacity Assessment

Twenty seven areas. Three domains. A printable report at the end showing your level in each area, your critical gaps, and what to do first.

Your answers stay in your browser unless you choose to share them. Nothing is sent anywhere by default, and the evidence notes you write are never transmitted at all.

`michaelukwuma.com/organisational-capacity-assessment`

WHAT YOU GET

- A level from one to five in each of twenty seven areas.
- A domain by domain view of where you are strong and where you are exposed.
- A critical gaps list, filtered to the things that block funding first.
- A report you can print and take into a board meeting.

HOW TO USE IT

Do it as a team. Where two people rate the same area differently, stop and find out why. That conversation is usually worth more than the score itself.

Then take the critical gaps list and put it against the ninety day plan on the previous page.

A last word

My first proposal was rejected and nobody told me why. I have spent the years since then making sure other people in this sector do not have to learn it that way.

The development sector in Africa is not short of committed people. It is not short of problems worth solving. What it is sometimes short of is the ability to connect those two things on paper, in a form a stranger in another country can verify and fund.

That is a skill. Skills can be learned. Start with the ground under your organisation, and the writing gets much easier than you expect.

ABOUT

Michael Ukwuma is a nonprofit consultant, leadership trainer and author working across Nigeria and West Africa. He is the founder of SEVICS Africa. He holds a Bachelor of Science in Anatomy and a Master of Science in Public Health Education, and his work has been published in international academic journals.

He has designed and facilitated programmes for youth, nonprofit professionals and community leaders across the continent, worked as Country Lead for HundrED Nigeria, and written more than ten books on leadership, development and community practice.

WORK WITH ME

I work with nonprofits on organisational capacity: governance, systems, evidence and the things a due diligence officer checks first. Scope is agreed before any budget is discussed.

Start with the free assessment. If what it surfaces is bigger than a quarter of internal work, we can talk about what a piece of work would look like.

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