

# GRANT PROPOSAL CHECKLIST

## J-PAL RESEARCH RESOURCES

### PRE-PROPOSAL PLANNING

- Review eligibility requirements. Are you eligible for this grant?
- Does your project fit within the funder's country and topic area priorities?
- Check funder's deadlines (for expression of interest, full proposal, etc.)
- Contact your institution's office for grants. What are the internal deadlines for review? Who needs to review what?
- Check procurement and payment restrictions by your institution. Do you need an open bidding process for purchases/contracts over a certain sum? Are there restrictions on what is reimbursable?
- Check funder's payment restrictions (such as the [Fly America Act](#)) and requirements (such as obtaining IRB approval before funds are released, or registering the trial prior to fieldwork)
- Obtain letters of support from implementing partners and sub-awards
- Plan sub-awards:
  - MoU between lead institution and sub-award
  - Deadlines for sub-awardee to review the proposal
- Confirm roles & responsibilities with staff involved in managing the grant (grants manager, RM, RAs). Do RMs and RAs know who the point person is? (e.g., who should they tell if fieldwork will be delayed and they think they need an extension)? What will the grants manager vs. RA/RM be responsible for?
- Decide on a communication plan for budgets with the grants manager. What types of information should be communicated, how often, and by what means?

### RESEARCH PROPOSAL FINAL CHECKS (IDEALLY BY SOMEONE NOT INVOLVED IN THE WRITING PROCESS)

- Is your study in line with the funder's priorities? Does it respond to the call?
- Is the language appropriate for the audience? If a non-technical audience, avoid jargon
- Is the project feasible? What needs to happen for the project to succeed, and how will it happen (e.g., partnerships with implementers)?
- Are your proposed intervention, methodology, and theory of change clear?
- Is your timeline clear, and does it seem feasible and make sense?
- Are your power calculation assumptions (such as about effect sizes and standard deviation of the outcome variable(s)) reasonable? Are the descriptions of the power calculations clear?
- If applicable, is your description of planned sub-group analysis clear? Note in particular funder priorities such as gender-disaggregated analysis
- If applicable, have you described how you will adjust for multiple hypothesis testing?
- Proofread the proposal
- Check local language translation

### THE BUDGET PROPOSAL

- Check budget for completeness (see [here](#) for a more complete list of items to include). Some key items:

- Census listing costs (if applicable)
  - Communication costs (e.g., phone credit)
  - Respondent compensation
  - Qualitative work such as focus groups
  - Quality control checks, e.g., translation and back translation costs, revisit and tracking costs, backchecks for 10% of surveys
  - Exchange rate and inflation assumptions
- Check all budget assumptions. Is the # of surveys/surveyor/day reasonable? Are travel costs reasonable? Is travel time reasonable?
  - Have you budgeted for overhead?
  - Does the budget justification provide sufficient detail for it to be clear how totals were constructed and how the budget amounts would change if necessary?
  - Check whether the funder wants a total budget, not just the amount requested from the funder, and provide this information if needed
  - If applicable, is the budget proposal in the template provided by the funder?

#### **GRANT MANAGEMENT AND REPORTING**

- Understand the award set-up. Will it be disbursed in tranches? Over pre-fixed time intervals? Is it cost-reimbursable?
- Understand the system your institution uses for accounting - this may include creating an online account or identifying the relevant financial officer
- Put deadlines in your calendar. In particular:
  - Your institution's financial year
  - Your funder's financial year
  - Deadline for no-cost extensions
  - Annual report: when it is due and when you will start working on it
  - Final report: when it is due and when you will start working on it
  - Deadline for other requirements (e.g., registering the trial)
- Check your institution's and the funder's reimbursement policies. Are digitized (photos) receipts allowed?
- Set up a system for tracking expenses, including for keeping concurrent documentation to go in the financial report. e.g., if you have a lunch meeting, where will you record attendees and what was discussed?
- Understand the system for submitting reports - is it over email? Do you need to create an online account?