

Work Plan Guide

A work plan is an invaluable tool for preparing successful grant proposals. Many proposals, especially those for government funders, are large and complex, requiring input from many different sources, both internal and external. For these, a detailed work plan is essential. Even for more straight forward foundation proposals, a work plan can help you stay organized, and make sure that you include everything you need to make the strongest possible request.

However simple or complex, the work plan has six main functions:

1. **Organizes information** – RFPs can be many pages long (or several inches thick); foundation proposal guidelines on the website may also be long and complex. A work plan simplifies and summarizes the process.
2. **Assigns sections to be written and target dates for completion** – includes the person, the target date, and a place to check when complete
3. **Outlines materials to be submitted to the funder** – Does the proposal require audited financials? A Board list? Letters of support?
4. **Establishes the proposal outline** – including important details, such as page limits for each section, formatting requirements, and the questions to be answered in each section. (See following page)
5. **Guides the writing of the project narrative** – the work plan uses the funder's own wording regarding the content of each section. This helps the writer not only to provide the information that the funder is looking for, but also to use key words from the RFP in the proposal narrative
6. **Serves as a monitoring tool** – to track the progress of proposal preparation, to ensure that you have answered all the questions, and to document that you have submitted all the required information within the funder's deadline.

You can create your work plan using spreadsheets, Gantt charts, or simple lists and documents like the following sample outline.

Proposal to XYZ Foundation

Project Title

Amount of Request:

Deadline: 11/11/2025

Section	Who?	When?	Y/ N
Executive Summary 1 page	JKG	11/1	
Background: <ul style="list-style-type: none"> • Who we are • Organization mission • Community • Needs assessment 2 pages	TR	10/25	
Project Description: <ul style="list-style-type: none"> • Approach • Target market • Goals & objectives • Activities • Staffing • Expected results 5 pages	JKG	10/1	Y
Evaluation: <ul style="list-style-type: none"> • Logic model • Explanation of metrics & KPIs 2 pages	TR	10/15	
Budget 2 pages	CFO	10/15	
Appendix: <ul style="list-style-type: none"> • Audited financials • Board list • Staff resumes • Annual report 10 pages	JKG	11/1	Y