Chapter 2:
Project Proposal & Write Up

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Objectives of this chapter

1. Master the tips for a successful project proposal.

2. Understand the components of a project proposal.

3. Writing a good project proposal.

Components of a Proposal

1. Cover Letter
2. Application Form (optional) / Tender
3. Proposal Text
4. Resume / Curriculum Vitae-Professional experience
5. Reference Letter-Testimonial

Components of a Proposal

Proposal Text

Project Proposal / Introduction (*What you want to do, Why it should be done*)

(a) Project Statement

(b) Project Rational

(c) Project Objectives

(d) Project Significant

…Components of a Proposal

Project Methodology / Formulation (*How*)
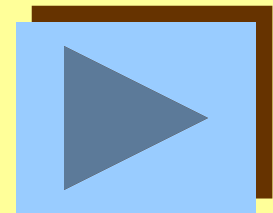
a. Project formulation for Institutions

b. Project Objectives

c. Project Organizational Structure & Personnel

d. Target Audience

e. Project Activities

…Components of a Proposal

Project Evaluation (*Expectation*)

a.   Project outcomes

b.   Presenting the Time Frame

…**Components of a Proposal**

Budget (*How much*)

a.   Tips for preparing your budget

- ▪   Project overview & budget
- ▪   Itemized budget
- ▪   Budget rational

Tips for a Successful Proposal

1. Think of your proposal as your personal representative.

   - good appearance, neat, well organized
   - well written, correct language
   - explain your idea clearly
   - convincing

2. Think high quality & professional.

3. Know your goal.

   - explain why project is important

… Tips for a Successful Proposal

4. Highlight what is unique/different about your project.

5. Know and have a good rapport with your funder/sponsor/client/customer.

- Two-way relationship between funder & you.

- What you can offer to funder?

- How much you know about the funder?

… Tips for a Successful Proposal

6. Follow the funder's procedure & work according to their system.

7. Use a clear language.

Developing a Two-way Relationship

Two-way relationship is between you & funder

1. Learn as much as you can about the funder.
2. Speak specifically about the funder's interests.
3. Speak the funder's language.
4. Include the funder's name.
5. Try to match your goals with the funder's goals & requirements

Worksheet: Watching Goals

Funder's Goal Your Goal

	Funder's Goal	Your Goal
1. Field of specialization		
2. Topic area		
3. Target audience		
4. Project objective		
5. Project methodology		
6. Time frame		
7. Award amount		
8. Due date for proposal		

Project Proposal Introduction 1(a) Project Statement

- It must be short, clear & give main idea of the project.

- It should answer the questions of:

a. **Who**-*target audience, who will benefit from your project*

b. **What**-*goals / objectives, major activities*

c. **Where-***location*

d. **Why**-*this project is important (immediate benefits & long term benefits)*

e. **When**-*duration for the project*

f. **How**-*to achieve goal / objectives*

1(b) Project Rational

- Provides important & relevant information about how the problem developed & what its current status is.

- This section should present a clear solutions.

- This is important because it gives the funder a good idea about the expertise & knowledge of the proposal writer.

Basic Ingredients for Project Rational

1. Present a clear & pressing problem
   - *show great urgency / great need (how many people are affected, & get benefit from your project)*

2. Provide important background information
   - *explaining how the problem began (cause & factor) & related information.*

Basic Ingredients for Project Rational

3. Give current status of the problem

-*Implication, current status of the problem.*

4. Show how your project will provide a solution to the problem

- *Your solution to the problem.*

- *Show how your project will address some aspect of the problem.*

- *Highlight what you expect, the benefits will be.*

Strengthening the Project Rational

Build a strong & persuasive argument.

1. **Try to contrast a very bad problem with a very good solution.** (3 steps involved):

1ˢᵗ, present a big & bad problem.

2ⁿᵈ, show the consequences of not solving the problem (create urgency).

3ʳᵈ, solve the problem (give solution that will provide timely and significant benefits).

*Tips: describe the problem big, bad, urgent with your solution that specific, beneficial, significant & timely.

Strengthening the Project Rational

2. Use research to demonstrate your knowledge and expertise

- Researching the problem & providing detailed information.

  i.e.: "Many Malaysian are infected by HIV" a better way to give this information is by adding statistics.

  "Approximately 80,000 Malaysian are infected by HIV accumulated to year 2005."

- Statistical numbers (concrete data) help show the magnitude and importance of a problem.

Strengthening the Project Rational

3. Only provide information that directly related to the problem

- *Provide updated & specifically related information.*

1(c) Project Objectives

To prepare project objectives:

1. List each objective

2. Be specific

3. Begin each objective with "To"

4. State who, what, where, when, how.

i.e.: To improve the quality (what) of the proposals submitted by Palestinian professionals, academics and institutions (who) to international funding agencies (where)

1(d) Project Significance

- It is another section that allows to strengthen argument for project.
- Highlight some of the points such as:

a. Emphasize why project is important.
b. State why project should be done at this time.
c. State why the methodology you propose is best.
d. State who will benefit and why (target audience).
e. Give long-term, wider benefits of project.
f. State how project fulfil the funder's goals.

Project Formulation / Methodology

- This section is "the heart" of the proposal.
- In the previous section, you have explained the cause of the problem. Here, you need to explain very clearly what you intend to do.
- Institutions usually to use the terms "Project Formulation".
- The term "Project Methodology" is usually used by academic researchers.

Project Formulation For Institutions

Project Formulation contains 5 critical ingredients:

a. Project Objectives (restated in detail)

b. Project Organizational Structure & Personnel

c. Target Audience

d. Project Activities & Implementation

e. Project Evaluation

(a) Project Objectives

- Project Objectives are restated more specifically.

- *i.e.: The overall aim of the proposed project is to develop an in-school counselling program for the Palestinian school system. Described within this broader goal, are three (3) specific objectives:*

1. *to provide counselling services for 500 schools, with a total pupil population of 227,100;*

2. *to develop the awareness of school personnel of the role and benefits of counselling within the school; and*

3. *to provide professional training for school counsellors and supervisors.*

(b) Project Organizational Structure & Personnel

- Organizational structure of the institution highlights departments / individual who will be directly involved in the project.

- If outsource personnel (consultants or trainers) will be hired in the project, they should be included under some branch of the institution.

- Organizational structure shows:

a. Chain of responsibility

b. "Who" is in charge of "What" (responsibilities & duties).

c. Resumes of all personnel associated

(c) **Target Audience**

- Re-discuss "Who" will benefit and "Why" from the project in detail.

- The target audience should be identified with specific numbers.

(d) Project Activities

- Each activity should be discussed clearly & comprehensively.

- The best way to do this is to go step-by-step.

- When you present each step, explain

a. Why it is important?

b. Why it is the best approach?

c. How it relates to the step before it?

d. How it relates to the overall project goal?

(d) Project Activities

- **Proposed Activities (checklist)**
  - What are the specific activities?
  - Are activities stated clearly?
  - Do activities clearly relate to the project goal?
  - Are the activities achievable?
  - Is the personnel qualified to conduct the activities?

- **Resources**
  - What resources are available?
  - What additional resources are needed? Why?

Project Evaluation

- Project evaluation looks at the elements of the evaluation procedures.

- It is important for both institutions & individuals:

a. To state what they expect to be the project outcome / results.

b. Show how these results can be demonstrated.

(a) Project Outcomes

- Funder's perspective:

- *"Anytime they are giving money for a project what they are really doing is making an investment. They may be making an investment in an idea, a program, or a people. Therefore, what you need to do (as PM) is to demonstrate the results of this investment & show how these results can be determined".*

State specific, tangible goals of project / "project outcomes."

- Funders want to see in getting something for the money that have invested in your project.

- You must able to give tangible results that state the benefits of the project.

- General or vague results are difficult to evaluate as it is difficult to determine if a project was successful or not.

- A clear method for evaluating your project will be helpful for both you & the Funder.

Provide method for evaluating project success

- Funders always take risks in providing money.
- To minimize this risk, they are careful to look for "Project Evaluation Procedures."
- If the project has a set, specific objective, they want to see how the goal or objective will be measured.

Highlight "Project Sustainability"

- Funders contributing to development programs are concerned both immediate results & long-term results as well (activities which will help this project continue into the future).

- They want to see that the benefits of the project will not stop after the project funding ends - "Project Sustainability."

- You (as PM) have to stress project continuity throughout your proposal.

(b) Explaining the Time Frame

- "Timeline" (Gantt Chart) is helpful to show when you will conduce each activity as it shows the relationship among the activities.

- In preparing timeline, you list the time sequence (hours, days, weeks / months) across the top. The activities down the left side of the page.

- For each activity, you write the name of the activity and mark of the duration for the activity.

Budget

- This section looks at tips for preparing a budget & provides a sample of budget & budget rational.

(a) Tips for Preparing Your Budget

1. Think like an accountant.

- To prepare a sound financial planning & management. Some questions that need to look into:

- How much money you need for each item?

- What is necessary?

- How much does each unit cost?

- How much does something cost for 6-months? for three-years?

- How much is the salary if the person is only working 25% of the time for 2 years?

Tips for Preparing Your Budget

- Mistake: giving just a general amount. It does not state specifically how the money will be used.

- This does not show responsible financial management / any kind of financial planning.

- To the Funder, it reflects the inability to manage his project & budget responsibly.

Tips for Preparing Your Budget

2. Include all expected costs.

- Specifically & accurately stating what items you really do need & include with their specific, detailed costs.

- Some people try to "play" with budget & put in items that they don't need in order to get more money than they actually need.

- Funders take great offense to this practice.

- If you plan your budget carefully, (include all the necessary items) you find that at the end of the project, you will have more than enough funds to complete your project.

Tips for Preparing Your Budget

3. Find official / documented sources to obtain cost amounts -- do not guess.

- In cost estimation, locate official sources to quote exact amounts of items.

- Find standard costs for equipment by contacting the procurement office / get quotation.

Tips for Preparing Your Budget

4. Be specific & accurate about all figures you quote.

- Once obtain a cost estimate from an official source, state the amount accurately.

- Do not try to exaggerate the amount.

- Funders take offense to this practice, because most Funder have worked with so many proposals, any type of exaggerated amount will usually standout.

Tips for Preparing Your Budget

5. Use a standard budget format.

- Budget should look neat and professional.

- Budgetary items are listed in a specific order: (1) Personnel costs; (2) Equipment costs; (3) Travel; (4) Training costs; (5) Materials & Office Supplies.

- Under each headings, list each specific item and its cost.

…Tips for Preparing Your Budget

6. Show brief calculation of cost in the itemized budget.

- In "Itemized Budget," put very brief, math calculations for each item.

- In the "Budget Rational," explain how you made each calculation and state the item's importance to the project (even something obvious like office supplies).

Proposal Attachments

1. Cover Letter

- Attaching a cover letter provides a nice, professional, & sophisticated touch to proposal.

- The cover letter is a VERY SHORT, CLEAR, IMPERSONAL note about the contents of what you are submitting to the Funder.

- Keep it impersonal -- many Funders like to be "objective" in their selection process. If you include any personal references, "wasta" type information / gratuitous salutations, it may be seen as "subjective" & biased.
Refer pg. 24 Sample Cover Letter

Proposal Attachment

2. **Application Form**

- Treat each question in application form as important.

Application form

1. **Type your application.**

- Application form is usually the 1st thing the Funder sees.

- Typed proposal looks professional.

- Typed application will avoid bad hand writing that the Funder has to struggle to read each word.

2. **Follow directions carefully.**

- Read the directions carefully & follow them exactly.

Application form

3. Fill in all the spaces & answer all the questions.

- Put N/A for "not applicable" do not leave it blank.
- Avoid putting "see above" or "same as above" -- unless the form allows.

4. Avoid using abbreviations.

- Other types of abbreviations are unfamiliar & become meaningless to the reader. (ex:FYI, FYTS)

Application form

5. Use the Funder's "codes" / special abbreviations.

- Some application use special "codes." Follow the directions for filling these sections.

6. Invite others to read your application form.

- "Fresh eyes" (someone who hasn't seen your proposal), to look for any errors that might have missed.

7. Curriculum Vitae / Resume

- Curriculum Vitae (CV) is used by academics to highlight their education & publications.

- Resume is used by professionals to highlight their professional experience.

Curriculum Vitae / Resume

1. **Highlight your skills, experience / knowledge which directly relate to the project.**

- Demonstrate that you are qualified to undertake & complete the project you have proposed.

2. **Omit personal information.**

- Personal information (marital status, number of children) is not included in professional resumes.

Curriculum Vitae / Resume

3. List most recent items and dates first.

- Listing dates work experience which put the most recent item / date first.

4. Be selective

- Not necessary include ALL the items as you will lose the point to highlight what you want to emphasize.

- Be selective in what you include & have a purpose for why you are including it in your CV.

Curriculum Vitae / Resume

5. Check for errors.

- Checking every words. Western funding agencies (native language is English) can be extremely & particularly critical about spelling errors.

6. Avoid abbreviations.
Except for general & universal words, all words should be spelled out.

Curriculum Vitae / Resume

7&8. Use standard style format.

- Make your resume looks neat & organized.

- Ex Format of CV / Resume:

a. Name

b. Address

c. Phone number & Fax

d. Education: (Year Degree, Specialization, University name, Place)

e. Professional Experience (Year, Position, Place)

f. Brief description of activities & services performed.

g. Highlight any awards / accomplishments

h. Professional Memberships

i. Publications / Contribution

8. Reference Letters / Testimonial

1. **Make sure to submit the Reference Letters / Forms on TIME!**

- If a funder asks for references, it shows the importance of it.

2. Keep the Reference professional.

- The Funder is wants to know about your professional experiences / quality of the project.

- Avoid stressing any personal / family relationship with the person to be your referee.