Training – Proposal writing
Proposal writing

• Tenders
  • Competition on price/quality
  • Predefined terms of reference
  • Budget ceiling defined

• Grant Proposals
  • Competition on relevance/approach
  • Broad fields predefined
  • Budget range defined
Tender Proposals

• Different donors have different standard procedures and formats
• For each project different scoring criteria (cost, approach, cv’s) – important to know
• Process
  • Expression of Interest
  • Shortlist
  • Technical and financial proposal
Preparation

• Study terms-of-reference including contractual arrangements (input-based, lumpsum-based etc)
• Visit clients to find out priorities and suggestions and establish contact
• Try find out scoring criteria
• Prepare attractive looking proposals (clear text, illustrations, markers)
Typical content tender proposal

• Introduction
• Comments on terms-of-reference
• Approach
• Workplan
• CVs
• Financial Proposal (separate)
Comments on terms of reference

• Start with words of praise..and continue in positive fashion
• Use this to correct things that you think are not workable/ correct; may need to be added or clarified (assumptions in your approach)
Approach

• Take terms-of-reference and write your own approach
• Make sure you do not deviate too much, cover all the points
• Refer occasionally to your own earlier experience and capabilities
• Show solid knowledge and sound imagination
• SUGGESTION: look at relation between consultancy services and operational budget, as the effectiveness of the first is very much dependent on the latter
Workplan

• List out all activities
• Provide time-line for it (consider using Microsoft Project)
• Make matrix of which team member will be responsible for each activity
• Give summary descriptions of responsibilities within the team
CV’s

• Use donor format
• Emphasize the strong points of key person for the project (rewrite CV)
• Not too long not too short
Financial proposal

• Very important!
• Safeguard your margins on fees and on operating costs
• Be very clear on what you are supposed to pay and what not
• Make sure no double-counting occurs
• Consider ‘pro memory’ items

SPECIAL TRAINING WILL BE PROVIDED
Grant Proposals

• CONCEPT DEVELOPMENT
• CONTACT WITH DONOR
• FINALIZE PROPOSAL
Grant Proposals

CONCEPT DEVELOPMENT

• Define problem
• Identify project proponents
• Identify partners and other stakeholders
• Stakeholder consultation and support
• Consolidate partnerships:
  • Clear objectives
  • Not too many players
  • ‘Champion’ in each organization
  • Real contributions
Proposal for Grants

CONCEPT DEVELOPMENT

• Context, problem definition
• Objectives
• Scope and scale
• Description of partners
• Tentative cost estimate
• Tentative timeframe
Assess the concept internally on donor priorities:

- **Problem definition**
- **Relevance**
  - Scientific and technical merit
- **Capacity building**
- **Gender considerations**
- **Human and institutional resources**
- **Complementarity**
- **Sustainability**
- **General research soundness**
- **Development relevance**
- **Ethical considerations**
- **Assumptions and risks**
- **Environment**
- **Monitoring and evaluation**
Contact donors

To see whether concept fits in with scope and priorities

• Informal inquiry
• Formal inquiry
Prepare proposal

• Basic information
• Project overview
• Background/ rationale/ goals/ objectives
• Info on partners
• Strategy, approach, workplan
• Budget
• Outputs and impact
• Risks and assumptions
• Monitoring and reporting
• Link proposal to objectives of WEC
Prepare budget

• Do factfinding on major cost items
• Separate:
  • Management/ administration costs
  • Direct hire
  • Consultancy fees
  • Training cost
  • Cost for producing resource material
  • Equipment and tools
  • Use of capital items
• In some cases define revenues from project too
Budget should fulfill:

- Respects all funding agency financial regulations and standard rates
- Uses unit costs based on current prices
- Relates directly to input quantities and scheduling
- Distinguishes program from management costs
- Reflects a proportionate balance between program and management costs
- Provides sufficient financial resources to manage the project effectively
- Provides sufficient detail without compromising financial reporting ability
- Presents an attractive cost/benefit package