ELEMENTS OF A PROJECT PROPOSAL

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Fundraising and the Effective Proposal

• Fundraising and the organization
• Sources of money
• Why do people/organizations give?
• “The Effective Proposal”
  --Components
  --Critiques
Organization and Fundraising 1

• Institutional objectives should be established
• Development objectives should be established
• Support should reflect institutional needs
• Start fundraising with natural prospects
• Search for sources of money

Organization and Fundraising 2

• Case for funds should reflect mission of granting institution
• Needs
• Involvement is key to support
• Prospect research should be thorough and...
• Realistic
• Cultivation of key donors and partners
• Solicit when previous principles followed
Types of Fundraising 1

- Individual versus organization as donor
- Proposals - specific requests
- Annual campaign
- Capital campaign
- Corporate and business support
  - in kind
  - cash
  - partnership

Types of Fundraising 2

- Non-profit support
  - in kind
  - cash
  - partnership
- Foundation or philanthropy
- Specific benefit event
- Major gift - money, land, stock, other
- Deferred or planned gift
Why Do People Give? 1

- Needs, motivations benefits to persons or...
- institutions who give
- Communitarian - doing good makes sense
- Altruist - doing good is an obligation
- Devout - doing good is G-d's will

Why Do People Give? 2

- Investor - doing good is good business
- Socialite - doing good is good business
- Person who repays - doing good in return
- Dynast - doing good is family tradition
Key Concepts of Proposals

• Write for the donor, not yourself
• Simple language that is interesting
• Clarity and descriptive text
• Avoid superlatives
• Defense is the worst offense
• Friend-raising, not fundraising

How to Write an Effective Proposal
## Components of Proposal

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### #1: Cover Letter

Includes funder’s name, title, and address:
- Directed to the responsible individual
- Brief overview of the organization and purpose
- Reason for the funding request
- The amount requested
- One or two pages
- Name and address of contact
- Signature
# 2: The Title

- Choose a title that conveys information about your project.
- Avoid jargon
- Make it brief

# 3: Summary Sheet

- Title of the Project
- Project Type
- Location
- Implementing agency
- Donor agency
- Duration of project
- Starting date
- Beneficiaries
- Project Cost
- Contact person name, title, phone and email address
- Narrative?
# 4: Project Description

- This is the first (and could be the only) part of the proposal that a busy reviewer will see.
- The PD should be a map of the rest of the proposal.
- It should be able to stand alone
- give it careful time and effort

Project Description...Cont...

- Provide a clear statement of the problem.
- Describe the factors that have contributed to the problem.
- Describe what has and has not worked in the past.
- Indicate what needs to be done (by you) now.
Never assume the proposal reviewer knows what you know.

Convince the reviewer that the problem is IMPORTANT!

# 5: Goals & Objectives

Goals:
What does this word mean? Let’s talk!

Objectives:
What does this word mean? Let’s talk!

How are these two words different? What do they mean to YOU?
Goals vs. Objectives

- Sometimes used interchangeably, but importantly and in practical terms, objectives form the foundation of goals.

- **Goals.** Think of the word 'go'; it has no end. They are usually: broader, less tangible and precise, more abstract, more difficult to measure and validate.

- **Objectives.** Think of the word "object." They are usually: narrower, more tangible and precise, more suited to measurement, evaluation, and validation.

  Miyamoto (2002) has said “Think of the goals as the treasure at the top of a stairway, and the objectives as the stairs.”

# 6 Activities

Implementation Steps

- Focus on **How** the objectives are to be accomplished and the goals are to be met.

- Use “Action” words, e.g., recruit, analyze, evaluate.
Effective Project Design

Goals, Objectives and Activities Should Always Relate to One Another

# 7: Input

• Resources (money, materials, time, personnel)
# 8: Output

- Goods/Products or services produced, and competencies and capacities resulting from the proposed activities.

# 9: Impact

- what will be different and better as a result of the work to be done.
# 10: Beneficiary

- Beneficiary
  - Direct
  - Indirect
    - Implementing Partner
    - Target Group
    - People of the Area

# 11: Sustainability

- Ability to generate results after the external support has been discontinued.
- While a project is limited by time, the benefits should continue without the need for external inputs.
# 12: Methodology

- State your method clearly
- Choose and detail appropriate policy
- Say something about evaluation and monitoring for validity and reliability
- Answer reviewers’ questions before they are asked!

Organization & Key Personnel

Describe your organization’s Strengths and Capabilities

Describe the people that will help to make decisions in how the project is carried out.

Provide a description of their background, training, and expertise.

Highlight everyone’s accomplishments.
Facilities

Describe any special capabilities or experiences possessed by your agency to carry out the project.

Evaluation

• Measures of performance
  – input
  – process
  – output
  – outcome
• Structure of Evaluation
• Process of evaluation and timetable
• Form and timetable of reporting
• How evaluation used for program
• Improvement
Structure of Evaluation

• Who will evaluate?
• How will evaluators be selected?
• Evaluation criteria
• Methods and instruments
  – instruments as attachments
• Process of analysis

Attachments

• Organization, Board
• Staff, with resumes
• Partner organization
• Letters of support
• Documentation as required
  – Status documents
  – Evaluation instruments
  – Bids
• Timetable
• Budget
Timetable

- Schedule of activities
- Use of staff
- Deliverable schedule
- Measurement schedule

Budget

- Line item or program budget
- Budget
- Budget justification
- Budget documentation
- Matching or in kind contribution
- Categories, rates, and documentation
Line Item Budget 1

- Personnel costs
- Salaries and wages
- Fringe benefits
- Consultants
- Contracts

Line Item Budget 2

- Non-personnel major costs
- Equipment - purchase or lease
- Space
- Overhead or indirect costs
Line Item Budget 3

- Non-personnel costs - not major
- Supplies or materials
- Travel
- Telephone or fax
- Postage or delivery
- Photocopying
- Books or documents
- Tuition and fees
- Publication costs
- Maintenance and repair
- Other expenses

Budget......Cont......

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Unit</th>
<th>Unit #</th>
<th>Unit cost</th>
<th>Donor</th>
<th>IP</th>
<th>Community</th>
<th>Total Cost</th>
</tr>
</thead>
</table>

**Code:** For better references to the desired item.
**Description:** The explanation of the expenses.
**Unit:** Measure for each expense.
**Unit Number (#):** The number for each unit.
**Unit Cost:** The price or rate for each unit.
**Cost Contribution:** Allocation of the cost for different sources.
**Total Cost:** Total sum of cost contribution.
Enjoy & Celebrate the Success