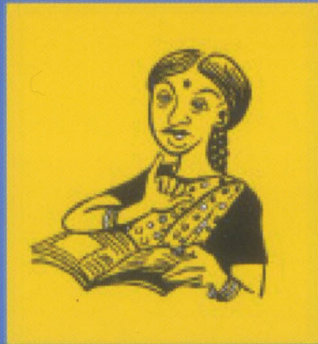


ABILIS MANUAL

1

Project Proposal Writing



Yutta Fricke

ABILIS

Development Aid for People with Disabilities

ABILIS Manual 1

Project Proposal Writing

Yutta Fricke



Development Aid for People with Disabilities

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NOTE! ABILIS FOUNDATION
recommends that the exercises in
ABILIS Manual 2: Planning for Success -
Participatory Project Planning are used in drafting a project plan
before using this ABILIS Manual 1.
.....
.....

ABILIS Manual 1.
Project Proposal Writing
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NOTE! Words that are underlined are explained
in the Word List found at the end of the Manual 1.

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Acknowledgements

The production of this manual was truly a global development process.

It began with a need (and frustration) regarding the preparation of project proposals expressed by disability groups in Central America, Africa and Asia, and echoed at Abilis Foundation Headquarters in Helsinki, Finland. The need was transformed into an Abilis project proposal that was approved for funding by the Ministry of Foreign Affairs of Finland, whose on-going collaboration has been vital to Abilis' success.

From Taija Heinonen, Tuula Heima-Tirkkonen, and Kalle Könkkölä at Abilis Headquarters, the expectations of a training manual on project planning and proposal preparation were then handed over to Yutta Fricke in Winnipeg, Canada. (Yutta was formerly Development Program Director of Disabled Peoples' International, DPI, and considers herself part of what Kalle calls the Abilis family.)

A first draft of the manual was prepared and presented to Abilis staff, board and colleagues in August 2002. We wish to extend special thanks for the input of Tuija Halmari of Finnish Disabled People's International Development Association, FIDIDA, Kari Bottas of Siemenpuu Foundation and Eija Mustonen from Finnish Service Centre for Development Cooperation, KEPA, Helsinki office. The Ministry for Foreign Affairs also provided their valuable input during the writing process.

The manual was then redrafted, becoming two manuals rather than one, edited by Andrea Cibinel, in Canada, and presented to a workshop of DPI's Sixth World Assembly held in Sapporo, Japan, in October 2002.

From there a third draft of the manual was passed onto Abilis partner organisations in Bangladesh, India, and Uganda. KEPA Zambia held a one-day workshop was a highlight of the testing phase of the manual's content. Many thanks go to all Abilis facilitators, KEPA Zambia staff and partners, whose input on language, lay-out and content were an enormous contribution. The competence, innovation and dedication of these individuals are key to the effectiveness of Abilis, and to any usefulness you may find in the manual itself.

The cartoons that illustrate the Manual were made by Katti Ka-Batembo, a Tanzanian cartoonist.

We recommend that you use this manual together with **Abilis Manual 2, Planning for Success - Participatory Project Planning**, which contains good hints for you on how to come about with a good plan – in a participatory way.

This is truly *your* manual. You are therefore welcome to photocopy and distribute it as you wish. However, we ask that you please acknowledge Abilis when you do so, and please send us a note to let us know how it is being used, and any observations you or the participants may have on how this or future manuals could be improved. And so the development process continues ...

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Development Aid for People with Disabilities







1. Introduction

The purpose of this manual is to assist Abilis partners in the Global South to successfully carry out their projects.

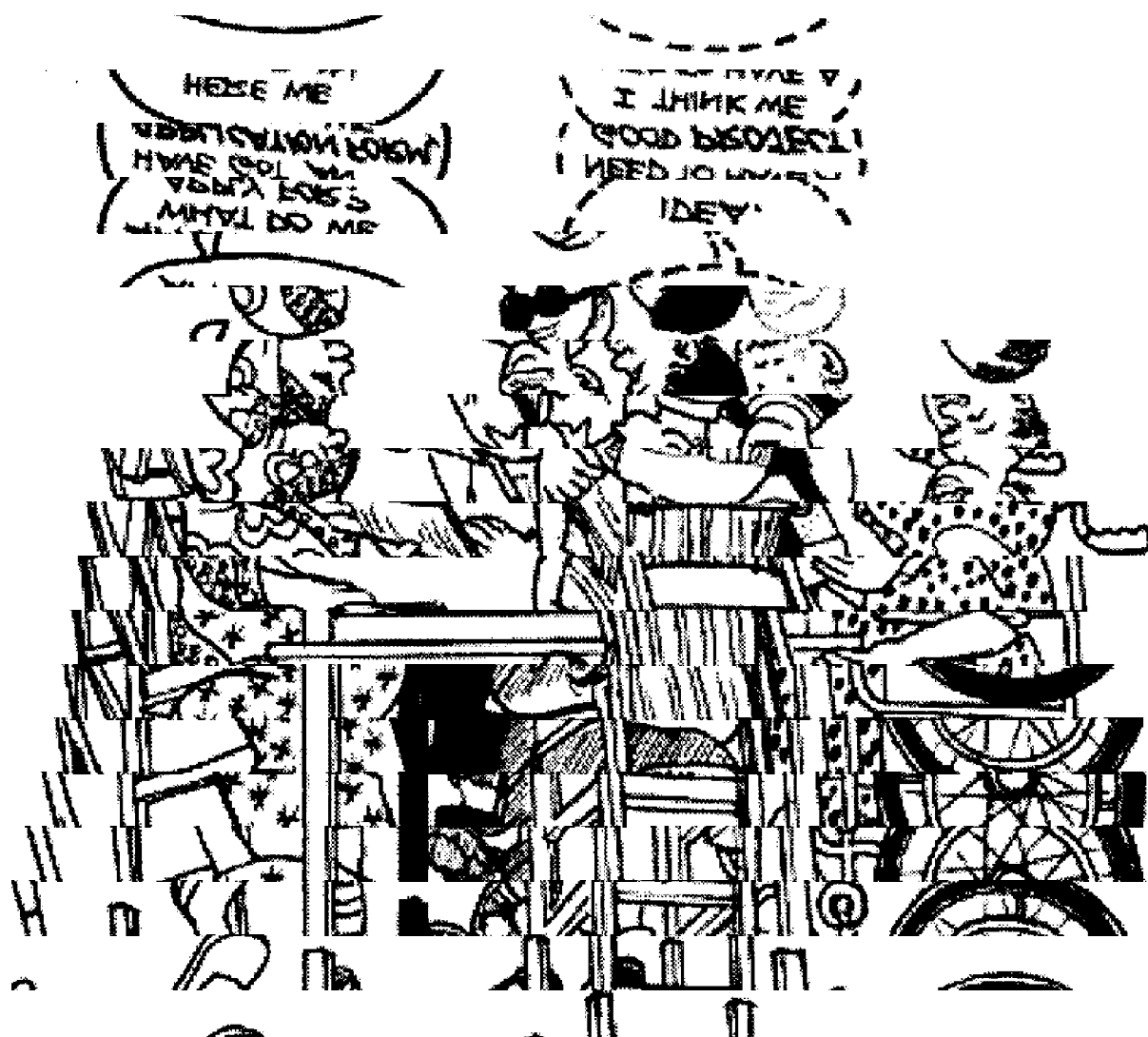
Abilis knows from its experience in disability and development, that there are lots of great ideas for projects among small and large groups of people with disabilities. Abilis also knows that sometimes the project planners feel like the demands of the funder result in extra work that *takes away from* instead of *adds to* the project. But all those requirements are there for a reason: The funder wants you to succeed!

This booklet will help make sense of the Abilis Foundation application form and many others. By focussing on what makes a good project or business plan, you will also learn the ingredients of a good funding proposal.

To get a project off the ground money is only part of the challenge. A successful project is built on:

-  **great ideas that meet real needs**
-  **goals that can be achieved**
-  **the right people and resources to carry out the project**
-  **strong commitment and participation - including in making decisions**
-  **excellent management**
-  **plans for future continuation and self - support of the activity**

By producing this manual, Abilis hopes to help its partners, and other community action groups, to go from great ideas to equally great projects.



HERE ME
(I DON'T KNOW HOW)
HAVE GOT MY
VOMITORS
MAY DO ME

I THINK ME
GOOD DISOBEY
I NEED TO LIVE
IDEA



2. Purpose of a Proposal

A project proposal is much like a business plan. It is usually prepared for people who are not familiar with either your organization or your project. The project plan will give the reader all the information needed about you and the activity you have in mind.

In the same way a bank would like to see your business plan before it offers you a loan, a funder asks for a project proposal. Unlike a bank, development agencies are not only interested in the management and financial parts of your business or project - they are also interested in the development aims. So there are two areas in which your proposal must convince the funder that you deserve its support:

1. You will contribute to development in your community.
2. You are capable of managing the resources needed to meet your dream.

.....
: **NOTE!** Think of the following guide as a business or "project" plan. :
: Do not think just about what the funder wants to hear, think about :
: what you need to do to manage your project effectively. If you have :
: a solid project plan, you are likely to have both a successful project :
: proposal *and* project. :
:
.....

The proposal headings set out in this section of the manual are based on Abilis guidelines. All funders basically ask the same questions:

Who? ... are you and who will benefit from the project

Why? ... are you planning a project

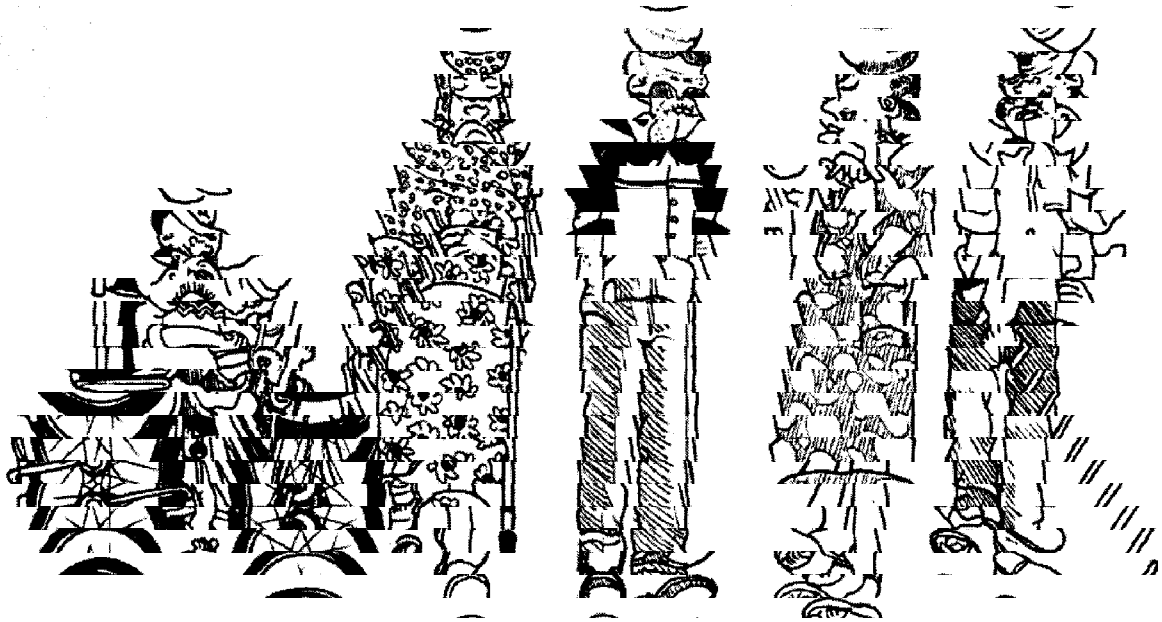
What? ... do you hope to achieve

Where? ... will the project take place

When? ... will it take place

How? ... will you proceed.

.....
: **NOTE!** The first page of Abilis Application Form (AAF) provides :
: a summary of your project proposal. Fill this page in last. :
: This manual's explanations begin with the questions on page 2. :
:
.....



3. Whose Project?

Question 7 in Abilis
Application Form,
AAF

1) Who are you? = "Project Applicant"

As a funder dedicated to disability and development, Abilis is especially interested in how your organization involves people with disabilities, including in your leadership. When you describe your organization to Abilis, or any other funder, be sure to include the following:

- ◆ Background of your organization or group. How was it started? Why?
- ◆ Activities and services. What does the group do?
- ◆ Previous experience, skilled people, or public support. Highlight anything that relates to the project.

NOTE! Abilis guidelines show how much they want you to write by how much space is provided in the box. Generally, funders prefer short, clear explanations and sentences rather than long ones. If you have extra information you want the funder to read (maybe an annual report or newspaper article about your group), attach it as an appendix.



EXAMPLE: Project Applicant

The Opportunityland Organization of People with Disabilities (OOPD) is a national organization, including persons who are blind, deaf, mobility impaired, as well as parents’ groups. It was created to help people with disabilities help themselves. Activities include leadership training, public education, and income generation. Every year OOPD organizes a national disability week including radio interviews, training workshops and a talent show. This year OOPD hopes to make this event even bigger with a national training seminar for people with disabilities.

.....
: **NOTE!** Highlight that your organization is made up of people with :
: disabilities. It is an important selling feature of a project that :
: targets people with disabilities. Think about it; who would know :
: more about your issues? :
:
.....

**2) Who are the partners working with you?
= “Co-operating Partners”**

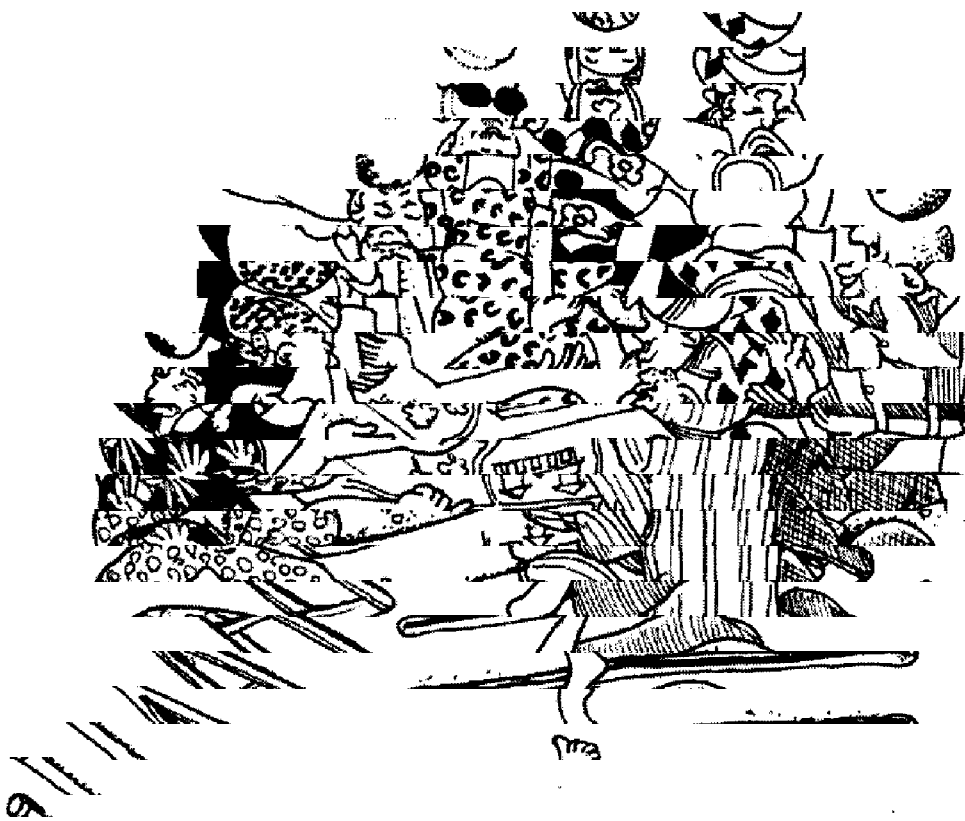
.....
Question
8 in AAF
.....

The involvement of other organizations in your project shows that you have support from your community and can access skills you might not have within your group. If you have been involving government bodies or other businesses, even if only for funding, this support adds strength to your proposal.

EXAMPLE: Co-operating Partners

This project will be carried out in partnership with the Opportunityland Learning Centre, which will provide space and training materials for the project. Participants who complete our leadership training certificate will be offered scholarships to continue their studies at the Centre’s Community Development Program. The Learning Centre is part of the advisory committee of the project, and so will provide advice to project staff throughout the project.





3) **Who are the women among you?** **= "Women's Participation"**

Question
9 in AAF

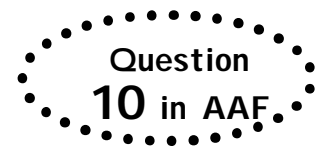
Because women are on the sidelines of activities and decision-making, it is important to Abilis and most agencies to know that they are fully included in the project. Ideally 50% of the project participants will be women. But that is not enough. They should also be fairly represented among the planners and decision-makers of your organization and project leadership.

NOTE! Some men think that women are too shy to participate or are not educated enough to contribute. For cultural and social reasons, many women have not developed all the same skills as men. Inclusion is the first step to a new balance of power. Help women organize themselves without men present. You can be sure there will be natural leaders!

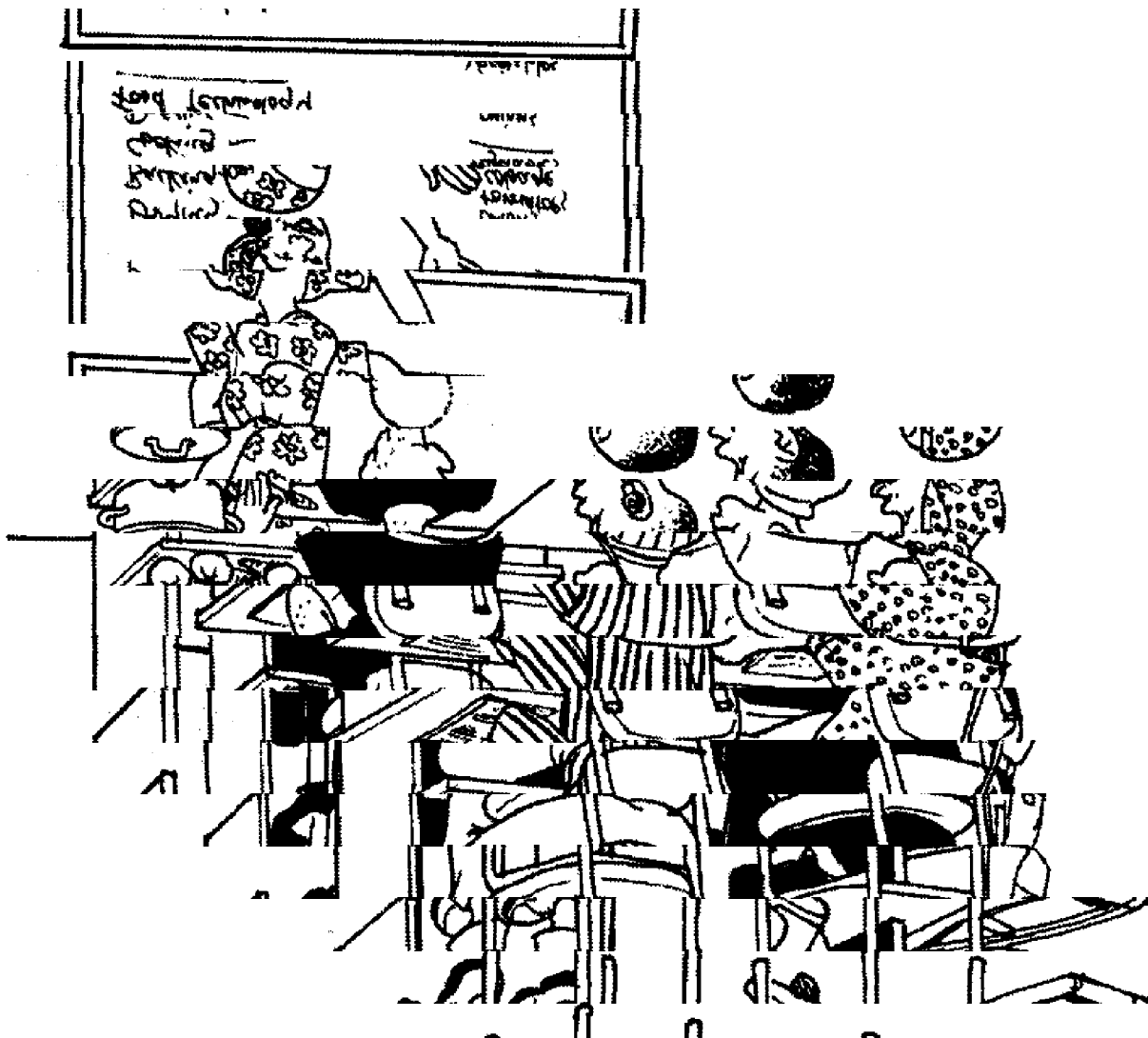
EXAMPLE: Women's Participation

Women will be included throughout this project. Of the 6 member Executive Board of OOPD, two persons are women, including the representative of the women's wing of OOPD. According to OOPD's Constitution, if the chairperson is a man, the vice chairperson must be a woman, as is the case presently. Two of the 4-person project planning team are also women. Part of the training seminar will be geared to women, including special workshops to discuss women's priority issues, like employment options and family life.

4) Who are the beneficiaries?



The beneficiaries are the people on whose behalf the project is being organized. They may include some of the people mentioned above among the partners that are coordinating the project. Generally, the beneficiaries include the participants who will benefit *directly* from their involvement in the project. In addition, there will be *indirect* beneficiaries, who may not be active in the project but whose lives will be affected nonetheless.

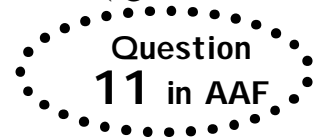


EXAMPLE: Beneficiaries

The direct beneficiaries of the project are the twenty disabled people who will receive skills training and the opportunity for employment in the food industry. The indirect beneficiaries will be the families, including several children of single mothers, whose income will be raised. All disabled people will benefit, as will the community generally, by this example of training and employment for people with disabilities.

4. Why do you need this project?

Abilis hopes that you develop your proposal idea with the participation of your members and the opinions of other members of the community who will be affected. Read more about this in ABILIS Manual 2: Planning for Success - Participatory **Project Planning**. **By using a process of participatory project planning**, you will have a clear understanding of exactly why you chose your particular project, beginning with the problems you need to address. Some project guidelines ask for a description of the “Problem.” Others, like Abilis, ask for the project **Background (Question 11 in AAF)**.



In describing the project background, share some of the information gathered in discussion groups, surveys and background research. You may wish to include the numbers and types of disabilities that are present in your district. Then, make a connection between your organization and this project in improving the situation.

EXAMPLE: Background

It is estimated that over 15 % of the population of Opportunityland is disabled. In some rural areas these numbers are much larger because of poor nutrition and river blindness. With a per capita average income of under 2000 Euro a year, poverty is widespread throughout Opportunityland. Because official aid does not target people with disabilities, most development programs do not include them at all. While the government officially promotes “education for all,” the lifelong exclusion of disabled people begins in childhood when they are discouraged from attending inaccessible schools.

This project plans to address the educational issues of people with disabilities in rural Opportunityland on many different levels, including integration into public education, scholarships for higher education, and technical skills training for adults with disabilities. OOPD will modify training materials that have already been developed by OOPD to suit the needs of rural Opportunityland.



5. *What do you hope to achieve?* = "Overall and Immediate Objectives"



What you do you hope to achieve can be divided into two parts:

- 1. in the long term and
- 2. by the end of the project.

1. Abilis refers to the long term aim or vision as the **Overall Objective**. (You will find this sometimes also called the *Development Objective*, the *Goal* or *Purpose*.) Your project will help meet the Overall Objective, but it cannot to do so alone. For instance, your vision or overall objective may be that disabled people in your country are educated. The skill training project you are planning will help in moving toward this vision, but many other policies and programs will also be necessary.


EXAMPLE: Overall Objective

(For the project "OOPD Bicycle and Wheelchair Construction and Repair Shop")

 *To increase the opportunities of people with disabilities in the community through employment and wheelchair access.*


2. What you hope to achieve during the time period of your project are the **Immediate Objectives**. (In some application forms these may also be called **Goals or Project Purpose**). Because the success of your project will be measured by how you are able to meet the objective(s), these should be realistic in the short term. Please see also *Checking Progress with "Monitoring & Evaluation,"* page 30.

EXAMPLE: Immediate Objectives

 *To train people with disabilities in bicycle repair and wheelchair construction*

 *To have the shop become profitable*

 *To offer mobility impaired persons access to affordable wheelchairs*

 *To increase the visibility of the persons with disabilities in the community*








NOTE! The objectives are generally written in point form, as shown above. This helps the writer be concrete and "to the point."

6. *Where, when, how* will the project happen?



These questions lead us into the nuts and bolts of the project proposal. At this point, it is especially important your team has the skills needed to develop a clear plan for how the activity will be managed. The management documents prepared here will eventually be used as part of your week-to-week guide for carrying out your project.

There are seven essential areas of your plan:

-  **Description of Activities**
-  **Work Plan**
-  **Time-line** (See also *Abilis Manual 2.*)
-  **Budget**
-  **Financial Management**
-  **Management Structure**
-  **Monitoring & Evaluation**



7. Description of Activities

Question
13 in AAF

The activity is the plan you chose to solve your problem. (The application forms of funders may refer to the *Strategy, Approach* or *Implementation Plan.*) This section describes what the activity is, where it will take place, when, and a general idea of how. If you used the participatory methods discussed in **ABILIS Manual 2, Planning for Success**, to decide on an activity, you can describe here how you decided on your project. The work plan will provide more organizational details.



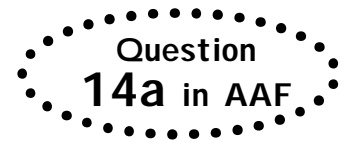
EXAMPLE: Activity

OOPD will carry out an 18-month training-the-trainer program entitled “OOPD Rural Leadership Training” beginning in the third quarter of 2003. The program will target people with disabilities in the rural areas. Groups of 5 trainees from the 4 western rural regions of Opportunityland will come to the OOPD training centre in the capital city every 6 months for a 2-week intensive program on organizational development skills. They will be trained on how to organize self-help groups in their communities, including independent living, education of children and employment training for disabled adults.

The trainees will be given tasks and resource materials to help them get started in their communities between their own training sessions. In some cases, the Internet will be used to keep in touch with the trainers and fellow trainees. The trainers will also visit each of the sites throughout the 18-month period.

This training program was chosen through community discussion groups and meetings of the OOPD Board. The approach allows OOPD to use the skills and curriculum already available within the organization.

8. Work Plan



A **work plan** provides all the organizational details of your activity, including a schedule and related resource needs. It should offer a complete picture of how the project will be organized from the beginning to the end of the project.

.....
: **NOTE!** Generally, a funder like Abilis requires about half a year to
: receive, review, gather additional information from references, make
: decision and transfer funds to its partner. So plan accordingly!
:

Just like following a recipe, often there is a natural order in which the various steps of the project must take place. These are the stages or phases of the planned activity. Generally, there are at least three stages, as follow:

Phase 1.

Start-up, possibly involving:

- ◇ Building the organizational structure (including board meetings, meetings with cooperating partners, hiring of staff and financial arrangements)
- ◇ Further background studies (including market analysis for income generating activity)
- ◇ Contacting participants (perhaps including application processes)
- ◇ Set up of office
- ◇ Booking future meeting locations, equipment and resource persons
- ◇ Publicity

Phase 2.

Event(s) or Activity (which will have their own stages)

Examples:

- ◇ Training program
- ◇ Special event or conference
- ◇ Product or service development and/or sale

Phase 3.

Follow-up

- ◇ Integration of project into regular program
- ◇ Evaluation activities
- ◇ Preparation and mailing of reports

EXAMPLE: Work Plan

(for the project “Opportunityland National Conference on the Standard Rules for the Equalization of Opportunities for Persons with Disabilities”)

Stage 1. Start-up

- ◇ Hire project coordinator.
- ◇ Update work plan.
- ◇ Establish an organizing committee.
- ◇ Invite and confirm speakers.
- ◇ Develop and print a final program along with registration forms.
- ◇ Confirm location of the conference site and sign contracts.
- ◇ Make accommodations to venue.
- ◇ Make equipment rental agreements.
- ◇ Contact related stakeholders including participants, businesses, and government.
- ◇ Coordinate transport
- ◇ Plan lunches and refreshments
- ◇ Plan special event and/or reception.
- ◇ Prepare documentation.
- ◇ Prepare media information packet.
- ◇ In month 6, an interim report will be sent to the funder.

Stage 2. Conference

- ◇ The event will take place over a three-day period.
- ◇ The theme of the conference will be “Human Rights and Disability.” Sub-themes include education, work, family life, cultural life, legislation and women’s issues. (A draft program should be included.)
- ◇ Participation will be limited to 50 delegates.
- ◇ Dignitaries, including Vice President, his Excellency Mr. X will attend the opening and closing ceremonies.
- ◇ Presentations will be made mornings from 9–10:15 and afternoons from 1:30–2:45.
- ◇ Presentations will be followed by workshops.
- ◇ Free transport will be provided for participants who need it.
- ◇ Lunch and two refreshment breaks will be included.
- ◇ Participants will be asked to complete an evaluation form.

Stage 3. Follow-up

- ◇ Review participant evaluation forms and use content for a final report.
- ◇ Link participants through Internet chats, using the organization website.
- ◇ Print conference report to send to participants and other stakeholders.
- ◇ Thank local contributors.
- ◇ Write grant reports.
- ◇ Organize audit of OOPD

NOTE! In order to use this work plan for project management, each of the activities must be broken down further into steps, with a person assigned to each step and given a deadline. An example of such a plan can be found in the *Abilis Manual 2 Planning for Success - Participatory Project Planning*, page 17





9. Time-line

Question
14b in AAF

The **time-line** is not necessarily based on the calendar, but more likely the number of weeks or months required for the various stages of the projects and activities within them. Before you set your time-line, check any important dates that might effect your project like:

- ◆ Funding deadlines and funding periods (maximum time limit for projects)
- ◆ National or religious holidays or other competing events
- ◆ National or International Disability Days (December 3rd is the International Day of Disability Rights)

To develop the **time-line**, use your work plan. Decide how long each activity will require and when it should take place. Provide a project completion date.

.....

● **NOTE!** If it is an event you are planning, you may wish to develop your time- line backwards. Begin with the date of the event, then list what needs to take place leading up to that date.

.....

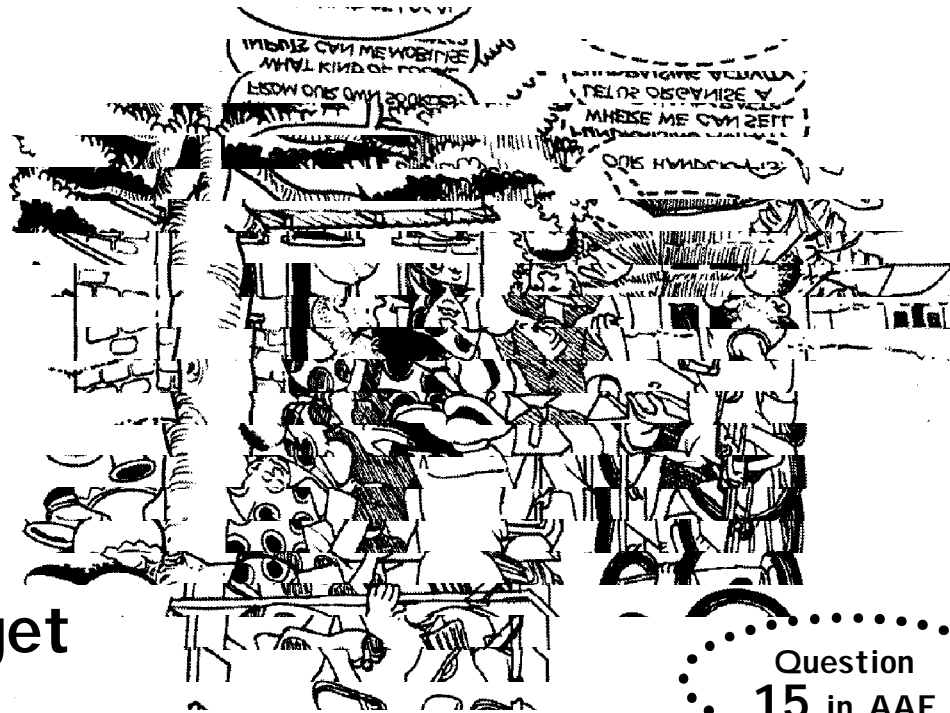
One way to combine the list of activities in the work plan with a time-line is to create a table. Activities are listed on the vertical line and months are listed across the horizontal, marking with an X the month in which the activity takes place.

EXAMPLE: Time-line

Phase 1 Activities	Mth 1-2	Mth 3-4	Mth 5-6	Mth 7-8	Mth 9-10	Mth 11-12
Hire coordinator	X					
Update work plan	X					
Confirm organizing committee	X					
Invite and confirm speakers	X	X				
Print a final program			X			
Confirm site	X					
Any accommodations to site are made				X	X	
Confirm rental equipment		X				X
Coordinate transport			X			X
Contact stakeholders			X	X	X	X
Plan lunches and refreshments					X	
Plan special event			X	X	X	
Prepare documentation				X	X	X
Prepare media information packet			X	X	X	
Send interim report				X		

Please note that many of the activities listed could be broken down into their own stages and sub-activities, with lists of whom to contact and when. Individuals using this plan would probably divide it further into weeks, and then plan day by day.





10. Budget

Question
15 in AAF

In order to plan your **budget**, you must first consider all the different resources required to carry out your project. These are sometimes referred to as the **means** or **inputs** of the project. (Your Work Plan will provide you with most of the information you need.)

Your project’s costs can likely be organized in the following categories:

- ◆ Project Personnel: experts, coordinators, technicians
- ◆ Materials and supplies
- ◆ Equipment
- ◆ Travel and accommodations
- ◆ Communication costs: alternate media, telephone, Internet and postage
- ◆ Documentation
- ◆ Disability accommodations 1)
- ◆ Administrative costs: utilities, rent and administrative staff
- ◆ Miscellaneous

1) List for the funder the costs linked to disability like putting documents in alternative formats, paying personal assistants, local transport, staying in more expensive accessible hotels etc. Also, be sure *you* do not forget these costs.

NOTE! Abilis and many other funders will only fund direct administrative costs of the project, and not general office expenses. You must estimate the project time required by administrative personnel and other project costs, like copying and mailing.

To develop your budget, consider the value of all the different inputs or resources used by the project, not just the costs you wish to have covered by the funder. Include the resources that your organization, your volunteers and other local donors will contribute. If there is no transfer of money, these are called “in-kind” contribu-

tions. Include them in your budget by calculating how much someone else would normally pay for the item or free hours of expertise.

.....
NOTE! Abilis asks its partners to please provide the budget figures in Euros. Abilis requires its partners to contribute 10% of the total project cost in cash or with the equivalent value of material or human resources.

EXAMPLE: Budget

For the Project Opportunityland Access Awareness Week

In your actual proposal the column entitled “other Fundraising” may be given the name of the donor. Below the budget, state the total amount being requested of the funder.

Budget

All figures are provided in Euros. The current exchange rate with the local currency (name) is X : 1 Euro.

Expense	Self-financed (in-kind)	Other Fund raising	Abilis	Total
Public Education Coordinator Euro 12 x 50 days	100		600	700
Committee members Euro 10 x 10 days x 6 members 1)	600			600
Theatre Company fee	200		400	600
Stage and audio equipment rental		300	500	800
Poster campaign - Design - Printing - Distribution			100 300 75	475
Radio commercials		600	600	1 200
Sign language interpreters			200	200
Bus rental 2)			600	600
Administration			500	500
Audit	100	100	300	500
Contingency	150	150	200	500
Total in EUR	1 150	1 150	4 375	6 675

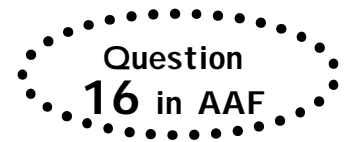
1) In kind. The members will devote their time free of charge.

2) OOPD will rent a bus for 3 days to transport mobility impaired members to the events.

The Opportunityland Organization of People with Disabilities requests that Abilis contribute 4 375 Euro to the project.

.....
NOTE! Under miscellaneous costs consider inflation and exchange rates. Because there can be delays of over a year before funds are received, rate changes can have a big impact on your financial situation.
 Budget the difference!

12. Financial Management



If finances are managed on an on-going basis, with ways of tracking all money coming in and going out, the **financial management** will not seem complicated at all. On the other hand, sometimes the actions of the most honest person in the world come into question when you just don't know where the money went. It happens in households around the world; it also happens in organizations. Don't let it happen to you! There are many steps you can take to *always* know where the money is (and not to run out).

1. Appoint one person to be in charge of the checkbook and the bookkeeping. Make sure that person is aware of the budgeted limits for expenditures in each area of the budget (ie. Communication, meeting space etc.) Therefore, she or he must also monitor and control the project expenditures of all other staff persons.
2. If the project director is also the bookkeeper, have the treasurer take an active role in tracking the cash flow. The person involved directly with the cash should have a supervisor.
3. Use only your organization's bank account for receiving funds and for spending the money. Have two peoples' signatures on every check. Sometimes an organization will have a third "signing authority" in case one of the regular two people is away.
4. Track your expenses and receipts on a weekly and monthly basis. Use a receipt book for noting all payments. Enter these and the amounts of other payments into a ledger. When you receive your monthly statement from the bank, make sure that what you have noted in the ledger matches the report from the bank account.
5. Have a certain amount of cash in the office, sometimes called "petty cash." Be sure to track this money as "miscellaneous office costs" in your ledger, and keep receipts.
6. For reporting purposes, note the official rate of exchange when you received your grant. Take note also of how that rate changed during the period of the project. The loss of exchange is itself considered a project cost. Budget and report on your project in either US dollars or Euros.
7. For unforeseen costs, like exchange rate loss, budget a "contingency fund." Budget approximately 10% of your total budget for the unknown.



8. Budget for an auditor if possible. Sometimes it is not possible because of the expense. In that case, ask someone independent of your organization (possibly from an international NGO) to review your finances at the end of the year and guarantee that they are in order.

In your project proposal, describe what steps you will take to manage the finances. Who will be responsible for the funds? Where will the funds be kept (provide full information of the bank)? How will the finances be monitored and reported? Do you have an outside auditor?

.....

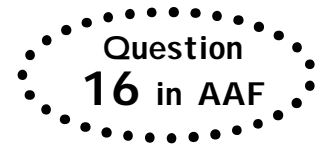
NOTE! If your organization already has financial reports or balance sheets from previous years, send a copy of the most recent one to Abilis together with the proposal. If you do not have a financial report then answer question 16 in AAF.

.....

EXAMPLE: Financial Management

OOPD has a part-time bookkeeper who will keep track of all finances. Expenditures will be made by cheque only with two signing authorities, including the Executive Director and the bookkeeper. The organization's Treasurer is a third signing authority, who reviews the work of the bookkeeper and reports to the Board on financial matters. Our books are audited on an annual basis. OOPD has an account at Opportunityland Central Bank. Please see address below. (Include full Bank mailing address.)

12. Management Structure



Most organizations and groups automatically elect or appoint members to carry out key responsibilities. Some of these are the chairperson or president, vice president, treasurer and secretary. Possibly your organization also has one or more staff persons and a small secretariat. Possibly you have neither. Maybe you have a partner organization that is providing staff persons... Whatever the case, there should be at least two organizational levels:

1. **project team or staff**
2. **supervisory structure, such as the board of directors**

As the role of the staff persons become more important in carrying out project plans, sometimes there is tension between staff and board. So it is important to know what kinds of tasks belong to each body.

Major functions of the board or elected leadership

1. **Hire, fire, and evaluate the executive director**
2. **Define the vision of the organization**
3. **Set policies**
4. **Speak on behalf of the organization to government officials and in public places**
5. **Have final responsibility (accountability) for the legal and financial operations of the organization**

Major functions of staff

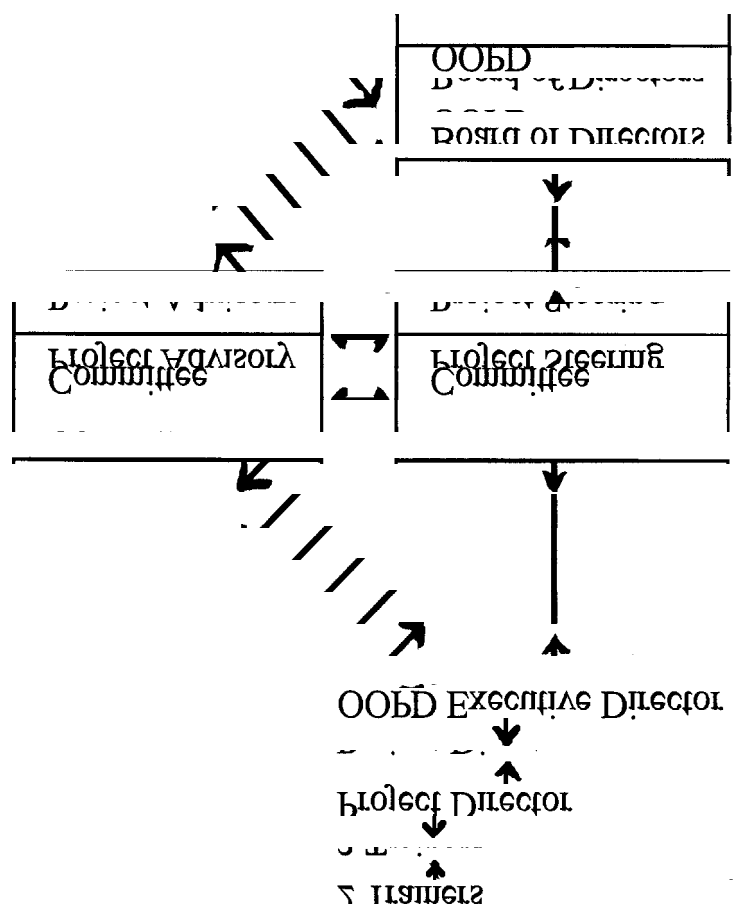
1. **Executive director is in charge of hiring, firing and supervising other staff or volunteers**
2. **Follow the priorities of the board in carrying out the organization's vision and policies**
3. **Report to the board for guidance on work plan and policies**
4. **Take charge of day-to-day operations including financial management.**

EXAMPLE: Management Structure

OOPD will have sole ownership of the OOPD Orthopedic Shoe Manufacturer and Store. An advisory board made up of OOPD leadership (two-thirds) and members of the business community (one-third) will have the main supervisory role for enterprise and will report regularly to the OOPD board, as well as to the funder. A business manager will be hired. He or she will be in charge of day-to-day operations, including supervision of staff, purchases of materials, marketing and financial management.

Some projects have an organizational and management structure that is far more complicated than this, including roles like project steering committee (created for the project), project advisory board, board of the organization, and several levels of staff functions. The more complicated the organization, the more necessary it is to make sure everyone knows who reports to whom and is responsible for what parts of the project. An organizational chart can help.

EXAMPLE: Organizational Chart



NOTE! If it is decided that a business venture would benefit from its own board of directors, be sure that it is still accountable to the disability organization's board. Two ways of ensuring accountability:

- (1) The organization's president is chairperson to both boards.
- (2) Over 50% of the new board's membership belong to the original board and are disabled.



13. Monitoring and Evaluation - Checking Progress

Question
16C in AAF

In the same way a bookkeeper will keep track of the actual costs in comparison to the expected costs, someone must also keep track of the actual activities and outcomes in comparison to those set out in the project plan. At the end of the project, this is called an evaluation. But tracking should actually begin when the project begins. This is called monitoring.

By constantly checking or **monitoring** progress, the project manager will know when something is not going right. Then she can tackle the problems before it's too late. On one level, your work plan and time-line will tell you if you have completed the tasks you set out for yourself on time. However, even if you do everything you said you were going to do, you might not be getting any closer to meeting the original aims you set out for yourself. For this reason, another focus of tracking is on the expected results. (This is sometimes called "results-based management").

What are the **expected results**? Both your overall and immediate objectives will help you in writing your list (see section 5, page 14). Ask yourself, if your aims (or "objectives" were fulfilled, how would you be able to tell? What changes would have taken place? What would be the results? The following list is based on the sample objectives provided in this manual.

EXAMPLE: *Expected Results*

1. *Twenty persons will be trained in bicycle repair and wheelchair construction.*
2. *After six months, the shop will begin meeting its costs through sales.*
3. *The shop will sell wheelchairs to local people with disabilities.*
4. *More people with disabilities will participate in community and employment activities.*

Once you have decided what results you expect to see, tracking also requires a way of checking progress over time. Changes can sometimes be noted simply by counting (called “quantitative indicators”). Other times, the expected results are not so concrete, like changes in peoples’ attitudes and way of doing things (called “qualitative indicators”). So for each result, you have to consider a different indicator and method for noting changes, as well as target dates. A table or worksheet can be helpful in organizing your information. An example is shown below.

EXAMPLE: *Project Monitoring Interim Report, (Month 8)*

Expected Result	Indicator	Method of monitoring	Outcome at Month 8
20 persons trained by shop	Number of people with disabilities employed	Counting trainees	10 persons fully trained 8 partially trained 2 dropped out
Profitability	Customer revenue covers costs	Monthly Bookkeeping	Emergency repairs resulted in 300 Euro deficit
Access to affordable wheelchairs	Number of wheelchairs built	Tracking	10 wheelchairs built at x cost of construction and x cost to buyer
Visibility of people with disabilities	Participation in other community activities	Survey of trainees and wheelchair users reveals changes in lifestyle	All responded that there has been an increase in their community involvement.



Monitoring progress is key to doing an **evaluation**, in which you also measure the final results and review the whole project, including the objectives and the chosen activities. Why did some areas of the project go very well and others not? What would you do differently next time? Even though an evaluation occurs at the end of the project, what and how you will evaluate must be thought through at the beginning. To help you see the impact of your project, you may wish to:

1. Carry out the same study or survey at the beginning and at the end of your project. By comparing numbers or attitudes, you will see if any changes occurred over the time period.
2. Set out specific targets for your project, either in numbers of participants, level of production, income or other. Measure your success in part by your ability to meet the targets. (similar examples provided in the table above.)

Based on the information gathered, a final evaluation report should provide information on the strengths and weaknesses of the project. It should highlight the successes, but also describe how the same activity could be improved in the future. Evaluators from outside your organization will add objectivity and strength to your report.

At the time of proposal writing, you need only to list the expected results and describe **how** you plan to monitor and evaluate progress. Include a table as before, omitting any information in the outcome column.

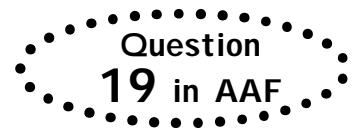
EXAMPLE: Monitoring and Evaluation

(OOPD Bicycle and Wheelchair Construction and Repair Shop)

This project will be monitored and evaluated based on the expected results listed above. Indicators have been chosen which will provide signs of progress and methods identified for measurement. Please see the table. Progress reports will be made to the funder every four months.

As a part of the final evaluation, all participants will be asked to respond to a questionnaire asking them what they learned during the project. They will be asked, what were the highlights, what were the challenges, what they would suggest we do differently next time, and finally, how this project has affected their lives. This information will be used for a broader evaluation of how the project is meeting its overall objective, which is increased inclusion of disabled persons in society. An individual from outside the organization will assist with the final evaluation.

14. Sustainability



In the long term, the activity you are planning will no longer be supported by project funding. If it is successful, it is likely that it will not be thought of as a “project” at all. Instead it will be included in the regular operations of your organization. Or, if it was a one-time training event, the event itself will be over, but the expected results (increased skill level of participants) will be carried forward to new personal or organizational development opportunities. This transition of the one or two-year project to regular community life is called “sustainability.” Funders like Abilis hope their contribution lasts beyond the life of the project, so they want to know what plans you have to make your project sustainable.

Some of the things you may wish to consider that could affect your project’s sustainability are included in the following checklist based on *A Development Co-operation Manual for Non-Governmental Organizations*, Ministry of Foreign Affairs in Finland.

Sustainability Checklist

1. Organizational sustainability

Is the division of responsibilities between various organizations, groups and or individuals clear?

Have various stakeholders participated in planning, decision making and implementation?

Does the project respond to the interests and skills of the participants and other stakeholders?

Is the management plan good?

2. Finances

Have the long-term running costs been considered?

Are there other possibilities for long-term financing?

3. Technology

Are local technologies and equipment being used (eg. wheelchair construction)?

Does the project build on existing local expertise?

Is there any training required

and has it been included in the work plan?

4. Risks

Are there organizations or individuals who would prefer that the project not be successful, and if so have any steps been taken to offset the threat?

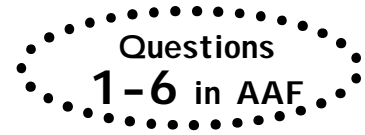
Is there legislation that could negatively affect the success of the project?

In your proposal, describe what steps you are taking to make sure your project will be sustainable. What are your long term plans for continuing the work beyond the life of the project? How will you use the results and resources developed by this project? From what other resources can you draw?

EXAMPLE: Sustainability

OOPD is an organization with a five-year history and strong connections to local government and business. This project is part of a broader 4-year plan of OOPD. The people who will be trained through this project (50% of whom will be women) are involved in the organization in many ways and are committed to sharing their skills in the future. OOPD's finances are in good order, as can be seen in the attached audited report. OOPD receives funds from two different overseas funders, in addition to local fundraising events, business sponsors and membership fees. OOPD has evaluated potential risks this project may face, both internal to the organization and external, and believes that the strong community support will ensure that both OOPD and the project are a success.

15. Finalizing the Proposal



Now that you know your project inside and out, this is the time to write the project summary. The Abilis application form asks very specific questions all of which have been discussed, except your contact information. Whether for Abilis or another funder, limit the summary to 1-2 pages. It includes:

- ◇ Title of project
- ◇ Start and end dates of the project
- ◇ Organization – Name, contact person, address, email and telephone
- ◇ Signatures and stamps, when asked
- ◇ Project Leaders and Participants
- ◇ Overall and Immediate Objectives
- ◇ Major Project Activities
- ◇ Total budget and amount requested of funder

16. Project Review

Before you send off the proposal, review it once more, at least!

Ask some of the stakeholders who were involved in the planning meeting to give you their opinion. If possible, have the project reviewed by someone with experience in the area. Or, find someone with a business background to study the project plan and someone else to edit the writing. The aim is to have outsiders confirm that the project can be undertaken with the planned resources within the expected time frame.

In your cover letter, be sure to let the funder know how you can most easily be contacted. **Please double check that all names and addresses are accurate and spelled correctly, including that of the bank to which funds would eventually be transferred.** If further information is requested by the funder, respond quickly. In this way you will already be convincing the funder that you will be a good partner...

Aside from the actual proposal, it is helpful to make a list of all documents that are required by the funder. **See the checklist on the first page of AAF.** Use the list to ensure that you have not forgotten anything, or that you have provided an explanation in the cover letter why an item is not available. Abilis requires a Certificate of Regis-

tration of your organization (or an explanation why you are not registered), a previous annual report if one exists, and two reference forms to be completed independently of your organization. Please see details in the application form.

NOTE! Make sure your proposal looks professional and easy to read. Use short sentences, short paragraphs and lists. Be consistent in your page formatting.



Best of luck!

WORD LIST

Activity: action taken in a project to move from plans and objectives to results

Beneficiaries: those who will benefit from the project, directly (the trainees for example) or indirectly (the families or businesses that also benefit from new skills)

Budget: detailed breakdown of expected costs

Contingency: money set aside for possible but still unknown expenses

Criteria: bases on which decisions are made

Cross-disability: involving a variety of disabilities: for instance, blind people, deaf people and people with mobility impairments working together all in one group

Evaluation: a critical review of the project, including a measurement of the results. Evaluators consider what happened, why it happened that way, and what might be done differently next time.

Focus group: gathering to get the opinions of a group of persons who share similar interests or experiences

Guidelines: directions offered to ensure that the reader is aware of the specific information required

Impact: the effect of the project

Implementation: carrying out of the project plans or activity

Indicators: signs that show that an objective or expected result has been fulfilled

In-kind: budgetary term to describe goods, things or services that have been donated yet still have a financial value for the project

Inputs: staff, volunteers, materials, space, administrative resources etc, that are all being used for the project

Integrate: include fully among others

Interim report: one that is offered while the project is still underway

Ledger: a notebook that is used by bookkeepers to keep track of money flowing in and out of a business

Monitoring: periodic checking of actual project progress versus expected progress

Myths: common belief not based on truth

Participatory project planning: a project planning process that involves persons affected, including in decision-making that will influence the design of the project

Project: a planned activity designed to meet clearly defined objectives with described resource in a specific time period

Resources: the personnel, materials, services, travel and other items needed for the project to take place

Stakeholders: groups and organizations who have an interest in the project, even if they have reason to be concerned about or dislike it. The list might include other community organizations, government or city officials, business persons, or media.

Stakeholder analysis: a study of who and how various interest groups will be affected by the project.

Sustainability: long-term integration of the new project into the systems, institutions and community life of the targeted population group.

Themes: topics

RESOURCE LIST

on Disability

The Programmer's Tool Kit, published by Disabled Peoples' International and Overseas Education Fund, 1987. Available from Disabled Peoples' International Headquarters, 748 Broadway, Winnipeg, Manitoba, Canada, R3G 0X3. Email: info@DPI.org, www.DPI.org.

UN Standard Rules on the Equalization of Opportunities for Persons with Disabilities

UN World Programme of Action Concerning Disabled Persons

Unesco World Programme of Action

Disability Action and Awareness produces a series of booklets on self-help organizing, fund-raising, disability legislation, and advocacy. For a list of publications, please see their website at DAA_ORG@compuserve.com or contact **DAA** at 11 Belgrave Rd, Rm 109, London, SW1V 1RB, United Kingdom; Tel: 44-71-834 04 77; Fax 44-71- 821 95 39

Mobility International USA, 1992, *Global Perspectives on Disability*, USA. MIUSA focuses on the integration of disabled persons into international educational exchange and recreational travel. For more information, please see their website at www.miusa.org, or contact MIUSA at PO Box 3551, Eugene, OR 9740; Fax 503-343-6812

OXFAM. Disability, Equality & Human Rights. A Trainers Manual for Development and Humanitarian organisations, Alison Harris with Sue Enfield, 2003. Available from Boumemart English Book Centre, P.O. Box 1496, Parkstone, Dorset B4 12340 UK, tel. +44 1202 712933, fax +44 1202 712930, Email: oxfam@bebc.co.uk.

National Council on Disability, VANE, Finland, has created the **Tool Box** as a guide for creating local disability policies. VANE's address is: Kirkkokatu 14, PL 33, 00023 Valtioneuvosto, Finland. Tel. +358 9 1607 4311, fax +358 9 1607 4312. Email: vanen.posti@stm.vn.fi, www.vane.to.

WWW sites:

<http://www.iddc.org.uk>

<http://www.who.int/ncd/disability/>

www.asksource.info

<http://www.aifo.it/english/apdrj/Journal.htm>
(Asian Pacific Disability rehabilitation Journal)

<http://cbrresources.org/>
(CBR)

www.worldbank.org
(search for theme "disability")

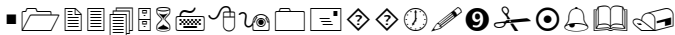
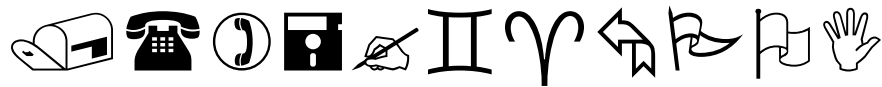
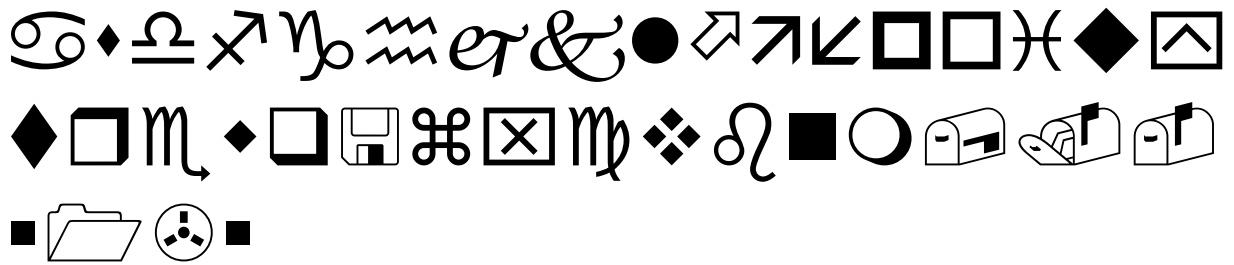
On Participation & Development

Ministry for Foreign Affairs of Finland, 2000, *A Development Co-operation Manual for Non-Governmental Organisations*, Finland. (Available free-of-charge from the Ministry of Foreign Affairs, Department for Development Co-operation, PB 176, 00161 Helsinki, Finland. Email: keoinfo@formin.fi, www.global.finland.fi.)

WWW sites:

<http://www.ids.ac.uk/ids/particip/index.html>

<http://www.cgdev.org/>



Project Proposal Writing

The purpose of this manual is to assist community action groups of disabled people and other non-disability groups to successfully carry out their projects. There are lots of great ideas for projects among small and large groups of people with disabilities.

A good project is built on:

- **great ideas that meet real needs**
- **goals that can be achieved**
- **the right people and resources to carry out the project**
- **strong commitment and participation – including in making decisions**
- **excellent management**
- **plans for future continuation and self-support of the activity**

This booklet will help you in putting all this on paper for Abilis or for other funders. By producing this manual, Abilis hopes to help community action groups to go from great ideas to equally great projects.



Development Aid for People with Disabilities

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