

Session 4.1 – Developing a Gantt Chart

Aim

To learn to develop a Gantt chart for project activities.

Outcome of this session

By the end of this session participants will be able to:

- Develop a Gantt Chart
- Reflect various project activities appropriately in a Gantt Chart.

Key points

1. A Gantt chart is one of the simplest tools to sequence your project activities.
2. It is easy to look at and to understand
3. It can be used for planning the sequence of activities
4. It gives an overview on what to do when
5. It can be used for monitoring
6. In Pakistan a Gantt chart is often called a work plan

Materials and handouts

4.1.1 Handout: Developing a Gantt Chart

Handout 4.1.1 – Developing a Gantt chart

What is A Gantt Chart?

A Gantt chart is a horizontal bar chart developed as a production control tool in 1917 by Henry L. Gantt, an American engineer and social scientist.

It is frequently used in project management. A Gantt chart provides a graphical illustration of a schedule that helps to plan, coordinate, and track specific tasks in a project.

Gantt charts may be simple versions created on graph paper or more complex automated versions created using project management applications such as Microsoft Project or Excel.

How to develop a Gantt Chart

A Gantt chart is constructed with a horizontal axis representing the total time span of the project, broken down into increments (for example, days, weeks, or months) and a vertical axis representing the tasks that make up the project.

Horizontal bars of varying lengths represent the sequences, timing, and time span for each task.

Example

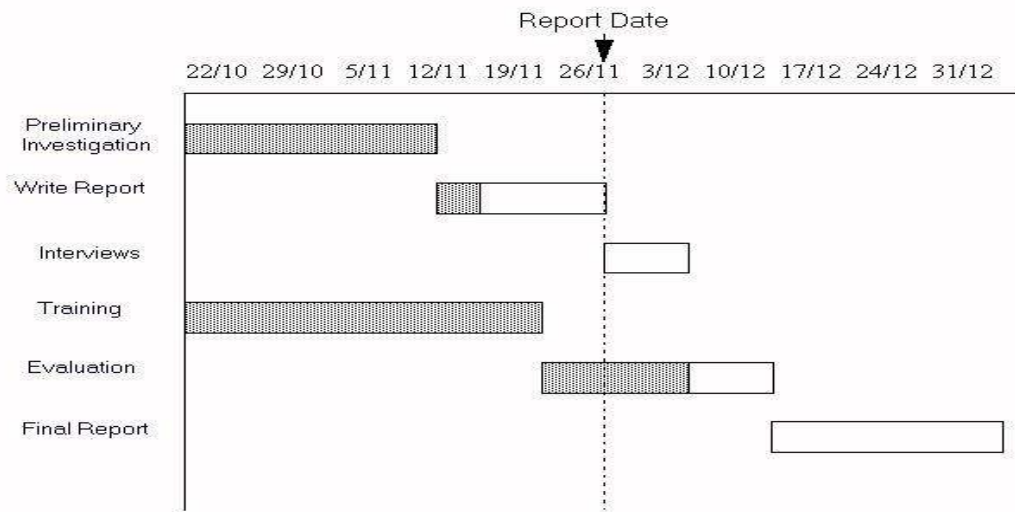


Figure 1: Gantt Chart

Session 4.2 – Developing a project budget

Aim

To learn to develop a project budget

Outcome of this session

By the end of this session participants will be able to:

- Understand the various steps involved in estimating the costs of various activities;
- Organize various costs in a simple and logical project budget format;
- Write suitable 'notes' to a project budget.

Key points

1. A budget is a statement of proposed expenditures
2. A budget has to be realistic and detailed, giving the basis for the calculation
3. Identify all cost items as thoroughly as possible
4. A detailed workplan is a good basis for developing the budget
5. It is important to give explanatory notes to explain hidden assumptions and to justify any unusual expenditure items
6. Every effort should be made to keep the management cost as a low percentage of total cost.

Materials and handouts

- 4.2.1 Handout on development of a project budget and writing tips for the budget section

Handout 4.2.1 – Developing a budget

Purpose of the Budget

A project budget is more than just a statement of proposed expenditures; it is an alternate way of expressing your project. Programs officers will look at your budget to see how well it fits with your proposed activities. Incomplete budgets are examples of sloppy preparation. Inflated budgets are signals of waste. Budgets that are too low cast doubt on your planning ability. In essence, your budget is as much a credibility statement as your project narrative.

Key Questions to Answer

As you prepare your budget, answer these questions. Does your budget

1. Provide sufficient resources to carry out your project?
2. Include a budget narrative that justifies major budget categories?
3. Present the budget in the format desired by the sponsor?
4. Provide sufficient detail so the reviewer can understand how various budget items were calculated?
5. Relate budget items to project objectives?
6. Include any attachments or special appendices to justify unusual requests?
7. Have low management costs ? Include the operational and administrative costs related to the activities under the budgets of these activities

Allowable Budget Categories

Unless the sponsor guidelines dictate otherwise, you can include in your budget request such things as accounting, advertising, audiovisual instruction, auditing, binding, books, computer time, consultants, dues, equipment, fringe benefits, indirect costs, instruments, insurance, legal services, maintenance, periodicals, postage, publication, recruitment, registration fees, relocation, renovation, rent, repairs, salaries and wages, security, subcontracts, supplies, telephone, travel, and tuition.

Programme Costs

Those costs that are line items listed in the budget as explicit project expenditure are called direct costs. The direct costs are usually categorized into personnel (people) and non-personnel (things) components. Personnel costs include such items as salaries, wages, consultant fees, and fringe benefits. Non-personnel costs include such items as equipment, supplies, travel, and publication charges. Space and utilities may be reflected as direct costs or included as a part of your indirect cost rate.

Management and/or Admin Costs

Those costs that are not directly listed in the budget and yet are costs incurred in the project are management costs or admin costs or sometimes called management overheads. These costs are real costs that are hard to pin down, such as payroll and accounting, library usage, space and equipment, and general project administration. Do you include in your proposal budget the costs associated with preparing payrolls or the time your boss spends

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talking with you about the project? While you could cost out those factors, and others, they become more difficult to quantify. At the same time, they are real project costs—someone has to write your payroll checks.

Cost Sharing

Those costs that your organization will contribute to the total project costs are called shared costs. You may contribute partial personnel costs, space, volunteer time, or other costs towards the total project expenses. Your cost sharing may be in the form of "hard" dollars (cash) or "soft" dollars (in-kind contributions). In-kind contributions do not require a cash outlay from your organization yet would cost real dollars if you had to pay for services rendered. Volunteer time is one example of in-kind cost sharing. Cost sharing may be mandatory or voluntary. Mandatory cost-sharing is often referred to as "matching funds;" it is required whereas voluntary cost sharing is optional. Your promise of cost sharing in a proposal budget may be a key factor in a sponsor's funding decision.

Writing Tips for the Budget Section

Make sure your calculations are as clear as possible. Show the basis of your calculations.

Example

Fuzzy: Travel = Rs 5000/-

Specific: Local mileage for project director, 500 mi/mo @ .5/mile x 2 months = 5000 (if possible, Indicate name, location, and date of travel)

- In multiyear budgets, allow for yearly increases; indicate annual percent increases.
- If the project is to occur in phases, identify the costs associated with each phase.
- Don't overlook budget support for such things as service or maintenance contracts (for instance, for computers, printers, telephone system etc)
- Include a budget narrative immediately following your budget to explain or justify any unusual expenditure items, even if one is not required by the sponsor.
- Write explanatory notes to explain your assumptions or complex calculations.
- Some sponsors expect you to continue funding your project after the grant expires. If you have a financing plan for future funding, briefly outline it. Other fund-raising options include membership fees, user charges, local organizations, other granting agencies, wealthy individuals, product sales, publications, and service fees.
- Make your budget **realistic**. Carefully think through exactly what you will need from the funding agency to carry out the project and establish your budget around this amount. (Don't forget, funding agencies receive lots of requests for funding. They can easily tell when someone has inflated a budget in order to procure funds for other purposes. Don't get caught in this situation.)

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- Do you really need a large amount of funding at the beginning of the project or will your project be "phased up" over a period of time? Sometimes it's not very realistic to expect a new project to be able to be up and operating (and spending large amounts) during the first 6 months or year of operating.
- A strategy to use with a potential funding agency is to ask for a small amount of funding for the first phase of the project. Specify in your proposal what you expect to achieve during this "minimal funding phase" and when you will be returning to the funding agency to ask for funds for the next phase. This can suggest to the funding agency that they can terminate the relationship easily if your project is not successful (and then make sure the first phase IS successful).

Session 4.3 and 5.1 – Writing a winning Project Proposal

Aim

To learn to write an effective project proposal.

Outcomes of this session

By the end of this session participants will be able to:

- Describe what are the key sections of a project proposal;
- Write suitable text for each of the major sections;
- Structure the proposal in a logical flow and sequence.

Key points

1. A project proposal has to be creative, clear, complete, comprehensive and concrete.
2. Need identification, LFA, PMF, Work Breakdown Structure, Gantt Chart and budget all are parts of a good project proposal
3. The proposal has to include why your organisation is specifically suited to conduct the project
4. Writing a project proposal is a process that needs input from different people in the organisation, including programme staff, finance staff and other key stakeholders like partner organizations, intended beneficiaries etc

Materials and handouts

4.3.1 Handout: Project Proposal Writing

Handout 4.3.1: Project Proposal Writing - Practical Tips

A proposal is a vehicle for an organization's search for resources to improve services to its constituency. In many instances, public and private sector donor agencies are explicit about the guidelines that apply to applications for financial or other support. In those instances, it is advisable to **comply** with the guidelines as stated. But what if there are no guidelines? And what if the organization has limited experience in preparing proposals? What if you as a manager are unsure whether the expenditure of time and effort to prepare a proposal is truly worth it?

There are some tips to preparing sound proposals and budgets. One of the first is the five 'C's. Be:

- creative
- clear
- complete
- comprehensive
- concrete

Before undertaking the preparation of a proposal, an organizational commitment should be clear. That is, the proposal should be consistent with the mission, strategic plan, and organisational niche. The proposal preparation process should engage staff at all levels:

- Those preparing the proposal should have access to organizational decision-makers so that they can be confident that what is being proposed has support throughout the organization
- Finance and program staff should be integrated throughout the proposal preparation exercise. Too often, these very important staff perspectives and skills function in isolation from one another, with the result that neither group is aware of the views and concerns of the other.
- Outcomes of community participatory processes should also be used to enrich the proposal.

Suggested Proposal Cover Sheet :

1. Project Identification Number (if applicable)
2. Project Title
3. Implementing Agency : Address (P.O. Box, Street) Telephone/Fax/E-mail Project Manager (with Title)
4. Start Date
5. End Date
6. Project Budget
 - Total Budget:
 - Grant Amount:
 - Implementing Agency Contribution
 - Contributions by Others (Description and/or amounts)
 - Income to be Generated
7. Project Partner Agencies (Please list with address, contact person)

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8. Project Summary: Brief highlights of the project (inputs, outputs, expected results) and principal implementing agencies or target groups. Innovations or unique approaches should also be briefly described.

Check to see if the agency you have in mind has any specifications for the cover sheet/title page (often they have a required format). Usually the Title Page includes signatures of key people in your organization (Department Head, Supervisor, Contracts Officer, etc.).

Your cover should look professional and neat. However, do not waste time using fancy report covers, expensive binding, or other procedures that may send the wrong message to the potential funding agency. You are trying to impress the potential funding agency with how you really need funding, not the message that you do things rather expensively!

Components of a good proposal:

1. Strong, concise (and even eloquent) summary of the request.
2. Good solid introduction that describes your organization's structure, track record, achievements, credibility, and outreach.
3. Thorough assessment of the problems the program will address.
4. Description of the solutions being proposed.
5. Set of goals and specific strategic objectives that outlines benefits from funding in tangible, measurable terms.
6. Brief narrative expanding on the work plan and the activities that will be employed to achieve desired results. Sustainability or income generation initiatives should also be described here.
7. Work Plan that shows activities, persons responsible, resources required, expected results
8. Gantt chart that shows activities and time frames.
9. Monitoring and evaluation plans that outline indicators for measuring progress, the degree to which objectives are met, plans for documentation and dissemination, and roles or responsibilities for all major participants.
10. Clear, complete budget showing relative contributions of all donors and the organization and linked to Work Plan.

Project Title

The title should be clear, and concise. A good title should paint a quick picture for the reader of the key idea(s) of your project.

The words you use in your title should clearly reflect the focus of your proposal. The most important words should come first, then the less important words. Notice that both of the following titles use the same words, except in a different order.

Title #1 is focused on *Indian Classical Music* and Title #2 is focused on *Renowned Indian Classical Musicians*. Make sure your words are in the correct order:

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Title #1 – Indian Classical Music and Renowned Musicians

Title #2 – Renowned Classical Musicians of India and their Music

Try to remove words from your title that really are not necessary for understanding. Title #1 below has too many words. Title #2 is almost as clear but with fewer words:

Title #1 - The Development of a Local Learning Center for the Community Education following a non formal education approach

Title #2 - A Local Learning Center for Community Education

Try and use only a single sentence for your title. If the sentence is getting too long, try removing some words. When all else fails try using a two part title with the parts separated by a colon (use only as a last resort!).

Project Overview / Summary

Think of the Project Overview as an Executive Summary (the busy executive probably only has enough time to read your Overview - not the entire proposal). Be specific and concise. Don't go in detail on things that are detailed further into your proposal. The Project Overview should "paint a picture" of your proposal in the mind of the reader. It should establish the framework so that the rest of the proposal has a frame of reference.

The best time to prepare the Project Overview is after you have completed the entire proposal (and you understand all aspects of your proposal very well). Let the Overview be your last piece of writing and then insert it at the beginning of your proposal.

Keep in mind that someone will be reviewing your proposal and you would like to have this person be very positive about what you have written. Work on your proposal so that you can avoid giving this person the opportunity to say things like:

- Not an original idea
- Rationale is weak
- Writing is vague
- Uncertain outcomes
- Does not have relevant experience
- Problem is not important
- Proposal is unfocused

Example: Project Overview

A community-based mothers and infants center called "Healthy Mothers for Healthy Kids (Mehak)" will be established in Akhroat Abad, a medium sized dwelling for low income communities in the provincial capital of Baluchistan province - Quetta. Mehak will focus on providing nutritional education and counseling for mothers, especially those from the extremely low income areas. It is expected that through the providing information to the mothers, it will be possible to Mehak will utilize volunteers who are students at the

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University of Baluchistan. Each student will be expected to successfully participate in a 4 week training program at the beginning of their work with Mehak. This training program will provide basic nutritional information for mothers and information on adult teaching methods. Student volunteers who demonstrate proficiency during the initial training program will be invited to participate in an advanced training program to learn effective nutritional counselling techniques. Each student volunteer will be expected to contribute 3-5 hours each week and to continue with Mehak for a period of not less than 6 months. Mehak will operate with 6 full and part time staff members. In addition, a Governing Board made up of community leaders and university staff will oversee to provide overall sanctioning of the Center's operation. Periodic evaluations will be conducted to assess the value of impact of Mehak on a) helping the student volunteers to become effective educators, b) development of new understandings on the part of local mothers and c) the improvement of the well being of children in Akhroat Abad.

Proposal Introduction

- Establishes who is applying for the funds (e.g., clearly describes the organization's structure, purpose, goals, programs, clients, and credibility).
- Offers specific evidence of, and/or statistics on, achievements
- Specifically demonstrates credibility in areas for which funds are sought
- Leads logically into the problem and solution statements
- Is brief, interesting, free of jargon, and relevant

Statement of the Problem

- Relates to the organization's mission and goals
- Is reasonable, feasible, and within the organization's capabilities
- Is supported by statistical evidence particularly related to target communities or groups. This is a good opportunity to use participatory processes to develop a rich and evocative problem statement.
- Should not make unsupported assumptions
- Is free of clichés, jargon, and meaningless phrases

It may be easier to think of this section as the outcome of your need identification exercise. Cite previous projects and studies that are similar to what you are proposing. Show the funding agency that you know what you are proposing because you are familiar with what has preceded you.

Position your project in relation to other efforts and show how your project will:

- a) extend the work that has been previously done,
- b) avoid the mistakes and/or errors that have been previously made, or
- c) be unique since it does not follow the same path as previously followed.

Use the statement of the problem to show that your proposed project is definitely needed and should be funded.

It is essential to include a well documented statement of the need/problem that is the basis for your project. What are the pressing problems that you want to address? How do you know these problems are important? What other sources similarly support these are major needs?

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Do you and/or your organization have a special reason why you are uniquely suited to conduct the project? (Geographic location, language expertise, prior involvements in this area, close relationship to the project clientele, etc.)

When you get to the Methods Section of your proposal it will be important to refer back to the needs you've identified in this section (and show how your methods will respond to these needs).

It can really help gain funding support for your project if you have already taken some small steps to begin your project. An excellent small step that can occur prior to requesting funding is a need assessment that you conduct (survey, interviews, focus groups, etc.). Write up your need assessment as a short Report, cite the Report in your proposal, and include a copy with the proposal.

This is an excellent section to have the reader begin to understand that an ongoing approach to the problem is essential (assuming that you are proposing a project that is ongoing in nature) and that short term responses may have negligible effect. This can begin to establish a rationale for why your project needs external funding - it seeks to provide a long term response.

Example: Statement of the problem / justification

Major obstacles to child survival in the developing world include infections, parasitic diseases, malnutrition and the risks associated with low birth weight and high fertility. (UN Informational Letter #37-435) A serious problem exists in the urban slums of Quetta of children dying from common illness and infections that are attributable to poor nutrition. Though high nutrition foods are available in the villages, it is apparent that mothers do not have an understanding of exactly what foods contain the most value for their children. (Ministry of Health, 1994) The most significant person in the life of the young child is the child's mother. Research has shown that the children of mothers who have an understanding of how to provide good nutrition to their children stand a significantly greater chance of survival during the first three years of life (87% survival rate) as compared with children of mothers who do not know how to provide good nutrition (43% survival rate) (Position Paper, Opening Plenary Session, Pakistan Health Conference – Islamabad - 2002).

The use of volunteers to provide community service is a new concept in Quetta and can be capitalized upon as a viable way to provide trained manpower for the offering of educational services. The first student service scheme, Service Serving Underserved (SSU) was created in the early 1990s. Initially operated at only two universities, SSU is now a mandated national program that operates at all public and private universities (Directorate for Higher Education, Ministry of Education, Statistics for 2003). The emphasis of SSU has been exclusively on the providing of information to local farmers on improved farming practices. The University of Baluchistan has been funded by the Ministry of Agriculture to operate the SSU Educational Development Center as a central agency for the providing of farming practices instructional materials to all universities in the country. The selection and training of

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student volunteers is conducted autonomously at each university with the support of the instructional materials disseminated by the SSU Educational Development Center.

Goal and Purpose

- Are SMART.
- Quantify specific program-related outcomes (describe in numerical terms)
- Clarify the group(s) to be served, trained, informed, assisted, facilitated, included, and supported.
- Make clear the number of items to be produced, introduced, or created in a set period of time.

Project Goal:

The **'project goal'** is the higher order objective to which the project is intended to contribute. It is:

- Beyond the reach of the project
- set out in the national strategic plan or in line with government policy
- Other projects contribute to the same goal

Example: To reduce the degree of malnutrition among young children

Project Purpose:

The **'project purpose'** is the stated objective of the project. It is:

- Within the reach of the project
- 'Owned' by the project partners
- Project is assessed against achievement of purpose.

Example:

Project Purpose 1: To assist mothers in Akhroat Abad in learning how to effectively apply health and nutrition information in helping their young children to be more healthy.

Project Purpose 2: To effectively use volunteers as a major resource in helping people to learn basic life skills.

Work Breakdown Structure Narrative

This section basically involves explaining the WBS. While writing this section, start with describing the WBS components of the project under which various activities are grouped. Then for each WBS component describe what major activities will be undertaken and how they would contribute towards achieving the expected outputs and outcomes. A good WBS narrative section;

- Flows naturally from problem, solution, and objective descriptions.
- Describes major activities clearly and in sequence.
- Identifies clients, target groups, or target locations/communities.
- Outlines methodologies used.
- Describes staffing, systems or procedures, and program innovations.
- Links with the Gantt chart and budget. That is, no activity should appear in the narrative that does not appear in the chart or the budget.

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If an activity has a specific number of participants (e.g., a training exercise for 20 persons), the cadre or number to be trained, the duration of the training, and the persons to do the training, these should be mentioned here. This will help make budgeting and monitoring more specific and accurate. However, It is not necessary to provide an exhaustive description of all the activities in the WBS. Only the key activities should be covered in detail, others briefly.

Activities

For this section use the result of the Logical Framework Approach and Work Breakdown Structure.

Beneficiaries or Clientele or target group

- Include specific information on the population, community groups, beneficiaries or clientele that your project is focused on.
- Exactly who are the clientele? Who is included in the clientele group?
- In what ways have you already had contact with the clientele group?
- Can you show that you have the support of the clientele group to move ahead with the project?
- In what ways have members of the clientele group been involved in the preparation of the proposal?
- What other agencies are involved with this clientele group (and have these other agencies been included in your proposed project)?
- It's important for the funding agency to see how much the clientele group has been involved with the project and the preparation of the proposal. (Sometimes a project is funded and then the director finds that the clientele group does not want to be involved!! Don't let that happen to you.)
- Be sure to clarify why it is important for the funding organization to be concerned about your clientele. Your proposal should clearly indicate how assisting your clientele is in the best interests of the funding organization.

Example: Beneficiaries or Clientele

The first, and primary, clientele are the mothers of young children who live in Akhroat Abad. This clientele group is represented in the project objectives for Goal #1.

The second clientele group is the students at the Baluchistan University who will participate in the Project as volunteers. This clientele group is represented in the project objectives for Goal # 2. Both clientele groups are important and essential components of this project. It is expected that significant learning will take place for both clientele groups.

Methodology

Here you describe how you want to achieve the results of your activities. For instance, participatory processes you want to use, how you develop IEC materials, how you make links with other providers and stakeholders, how you organise trainings.

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Personnel

Identify those people who will actually receive funding under the proposal. Include short descriptions of each of the people who will be involved in your project and supported by the funding. The descriptions should clarify in the mind of the potential funding agency that these people are ideally suited to conduct the project;

Example: Two full time staff , with a background in health and nutrition, at 100% salary, three part time persons at 50% salary.

Link with Gantt chart and Budget

Give a short narrative of Gantt chart and budget and provide these in the annex.

Monitoring and evaluation

- Covers outcomes or results and processes.
- Clearly describes who will be monitoring and at what intervals, who will be evaluating and what criteria will be used to select evaluators.
- Identifies clients, target groups, or target locations/communities.
- Lists key indicators and evaluation criteria. The proposal does not have to list each and every indicator but should show how indicators will be used
- Describes reporting requirements, intervals, and production (e.g., monthly, quarterly, semi-annually, annually), by whom and to whom. Feedback mechanisms should also be described.
- Shows how report, monitoring, review, and evaluation findings will be used to improve program design or performance, to validate approaches or requests for new funding, to document lessons learned, better practices, and replicable models, and for advocacy.
- Outlines ways in which these functions will result in community participation and review.

The outcome of your Performance Measurement Framework (PMF) will help you to write this section.

Overheads of presentation of day 4
