



Overseas Education Fund

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PD-4AV-1162

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"TECHNICAL ADVISORY SERVICE FOR INTERNATIONAL WOMEN'S
DEVELOPMENT ORGANIZATIONS AND THE AFFILIATED INDIGENOUS
ORGANIZATIONS"

(AID Grant No. OTR-0200-G-SS-1137-00)

FINAL REPORT, YEAR 1

Period of July 1, 1981 - June 30, 1982

Background

For thirty five years and in more than fifty countries, the Overseas Education Fund (OEF) has concerned itself with the socioeconomic condition of women and their families. OEF's projects today are undertaken in partnership with Third World development organizations and aim to increase women's income, improve their productivity, and enhance the quality of their lives through programs of technical assistance.

In June 1981, the Office of Women in Development awarded OEF a two-year grant of \$174,175 to increase the capabilities of women's development organizations through a program of short-term technical assistance. This report is an account of activities conducted during the first year of the grant period.

The WIDTech Program

Grant activities have been administered through OEF's short-term technical assistance program, "WIDTech." WIDTech assistance in organizational management, project management, and income-generating activities is available worldwide, and to groups at all levels--international, national, and community-based.

Funding for WIDTech comes from three sources: USAID, OEF's \$150,000 grant from the William and Flora Hewlett Foundation, and client fees. Most of the AID funding for WIDTech is from the Office of Women in Development grant. However, OEF's cooperative agreement with the Office of Private and Voluntary Cooperation (Grant #PDC-0197-A-00-2056-00) also provides for short-term technical assistance and has financed several important WIDTech activities this year. Additionally, the USAID Mission to Guyana shared the costs of assistance to one WIDTech client during Year 1. It is hoped that more such support from overseas missions will be possible in the years ahead.

Client fees, as well, will represent an increasingly significant source of financing as WIDTech aims to achieve self-sufficiency. While fees are not required of certain clients (usually smaller, grass-roots groups), other organizations have made sizeable contributions. Yet, even clients with scarce financial resources have demonstrated their commitment by offering important in-kind contributions such as lodging for OEF consultants, subsistence for trainees, and logistical and secretarial support.

It is important that OEF has been able to attract private support for this program. The Hewlett Grant, in particular, represents a significant contribution to OEF's base of private sector support.

With funding from these different sources, WIDTech has become a major service of OEF. For the first time, OEF has been able to respond to the numerous requests it receives for "technical assistance"--ranging from orders of OEF publications to proposals for on-site training--through one, coordinated effort.

WIDTech was designed so that the variously funded activities would complement one another and together build a stronger program. The separate identity of each component has also been maintained, however, and the diversity of the project's financial base has given rise to considerable flexibility and creativity in programming.

For example, technical assistance financed by the Office of Private and Voluntary Cooperation is accompanied by efforts to develop longer-term projects with the groups assisted (or with other groups in the countries visited). Hewlett funds enable OEF to engage in activities which might not be possible with AID funding, such as technical assistance to groups in non-AID-assisted countries.

When clients pay all or part of the training costs, the WIDTech budget is extended that much further to accommodate additional requests. Alternatively, collaborating with organizations that can underwrite a major portion of the technical assistance costs enables OEF to mount larger-scale efforts, such as regional workshops, which would normally be outside the scope of the WIDTech project.

There are financial as well as programmatic reasons for combining the funds into one project. Through WIDTech, OEF's short-term technical assistance delivery system enjoys an "economy of scale" in administrative expenses. The sharing of certain fixed costs by USAID, Hewlett, and WIDTech clients means that a greater proportion of the money from each source is then available for field work. In short, WIDTech has become an important effort by OEF to developing more cost-efficient programs, while at the same time improving upon the services it offers.

The accompanying brochure presents more detail on the technical assistance offered through WIDTech and on the selection criteria for client groups.

Year 1 Accomplishments

The implementation plan for Year 1 of this grant consists of three major activity areas:

1. Information collection on international and indigenous women's organizations, their needs, and available resources to meet those needs.
2. Technical assistance to international and indigenous women's organizations.

3. A limited amount of seed-money funds to women's development organizations which received technical assistance through the grant.

Following is a description of each of these activity areas.

1. Information Collection and Needs Assessment

During the second half of the year a direct mail campaign was organized to publicize the WIDTech Project to prospective clients and to invite their requests for assistance. The mailer consisted of a cover letter, brochure, and application for assistance. The application, in questionnaire form, was designed to: 1) collect preliminary information on the client organization's technical assistance needs, and 2) determine the organization's eligibility for WIDTech assistance according to the established criteria.

Brochures were distributed to AID and Peace Corps field missions for their assistance in identifying prospective WIDTech clients. Copies were also mailed directly to organizations known to OEF as possible candidates for assistance. In all, approximately 1,200 brochures in English, Spanish, and French have now been distributed.

Once a client has applied and appears to meet the selection criteria, more detailed information on the organization's capabilities and needs is sought. Such information is obtained through correspondence and other communication prior to the trip, and during an on-site organizational diagnosis/needs assessment which precedes the training or consultation. This latter activity is, in effect, technical assistance in the area of problem/needs identification.

As a means to facilitate this important step, a one-day participatory training design in assessing organizational needs was developed during the fourth quarter. A copy can be found in the Appendix to this report.

2. Technical Assistance

- a) Field Training and Consultation

During Year 1, twenty requests for WIDTech field training/consultation were received from seventeen different countries. Nine of these groups subsequently became clients during the first year, five of them with support from USAID. Summaries of each of these consultations are given below.

Client #1: The International Alliance of Women
London, England

June 23 - July 6, 1981

Assistance in designing a project and preparing a proposal for funding a series of workshops in the Middle East, Africa, and the Pacific for IAW affiliate organizations. Workshops would provide national and community leaders with the skills to implement development projects in the areas of family planning, child care, vocational training income-generation. (Conducted by Hortense Dicker, OEF Consultant)

October 18 - 28, 1981

Continuation of assistance as described above. (Conducted by Rana Harmon, WIDTech Project Director)

Funded by USAID/Office of Women in Development¹

Client #2: The Haitian Development Foundation
Port-au-Prince, Haiti

January 27 - February 10, 1982

Consultation with HDF core staff to assist with the design of a new effort to integrate more women into the organization credit and business advisory program. The new women's program would include motivating beneficiaries to practice family planning. The WIDTech consultation provided technical assistance to the Women's Project Officer in community needs assessment, project design and proposal writing. A WIDTech seed-money grant for \$5,000 has also been awarded to finance the project's start-up costs. (Conducted by Rana Harmon, WIDTech Project Director)

Funded by the William and Flora Hewlett Foundation

Client #3: Guyanese Craft Producers
Georgetown, Guyana

March 21 - April 2, 1982

Feasibility study of the production and marketing of Guyanese crafts.

June 13 - 16, 1982

Meeting of producers and retailers to discuss the feasibility study and to propose a plan of assistance for their industry.

(Both trips conducted by Rana Harmon, WIDTech Project Director)

Funded by USAID/Guyana and USAID/Office of Private and Voluntary Cooperation.²

¹ A copy of the proposal was submitted to the Office of Women in Development, December 1981.

² A copy of the study was submitted to the Office of Women in Development, April, 1982.

5 April ?

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Client #4: The Somali Women's Democratic Organization
Mogadishu, Somalia

March 25 - April 10, 1982

Training for SWDO's leaders and outreach workers in community needs assessment, project identification and design, proposal writing, project evaluation, and integrating family planning/health with women's development activities.

(Conducted by Christine MacCallum, OEF Director of Program Planning for Africa/Middle East)

Funded by the William and Flora Hewlett Foundation

Client #5: The North Solomons Women's Investment Corporation
Arawa, Papua New Guinea

June 10 - 23, 1982

Training in financial management for small businesses, community needs assessment and project identification design. Participants were NOSWIC core staff and women's leaders from the communities in which NOSWIC had developed economic activities for women (e.g., sewing training and marketing center, take-away food shop).

(Conducted by Carolyn Gullatt, OEF Consultant.)

Funded by USAID/Office of Women in Development and the Government of Papua New Guinea.³

Client #6: The National Council of Women
Kingstown, St. Vincent

Client #7: The University of the West Indies
Kingstown, St. Vincent Campus

July 4 - 31, 1982

Short-term consultations with each group, each one an applicant for WIDTech assistance, to assess their training needs and to plan for future training, if appropriate.

(Conducted by Hortense Dicker, OEF Consultant)

Funded by USAID/Office of Private and Voluntary Cooperation.

Client #8: International Planned Parenthood Federation
July 21 - August 8, 1982

-International Planned Parenthood Federation (London, England)

Consultation to discuss: 1) upcoming trip to Zaire in which OEF consultant would assist a group of Angolan refugee women in preparing a proposal to IPPF for funding, and 2) future collaboration between OEF and IPPF.

³ A copy of the trip report is given in the Appendix.

-International Planned Parenthood Federation (Nairobi, Kenya)

Consultation to discuss IPPF/Kenya's request for OEF's assistance with its projects in Africa.

(Both consultations conducted by Margaret Schuler, OEF Director of Women in Law and Development Project.

Funded by the William and Flora Hewlett Foundation.

Client #9: Africa Cooperative Savings and Credit Association
Nairobi, Kenya

July 25 - August 8, 1982

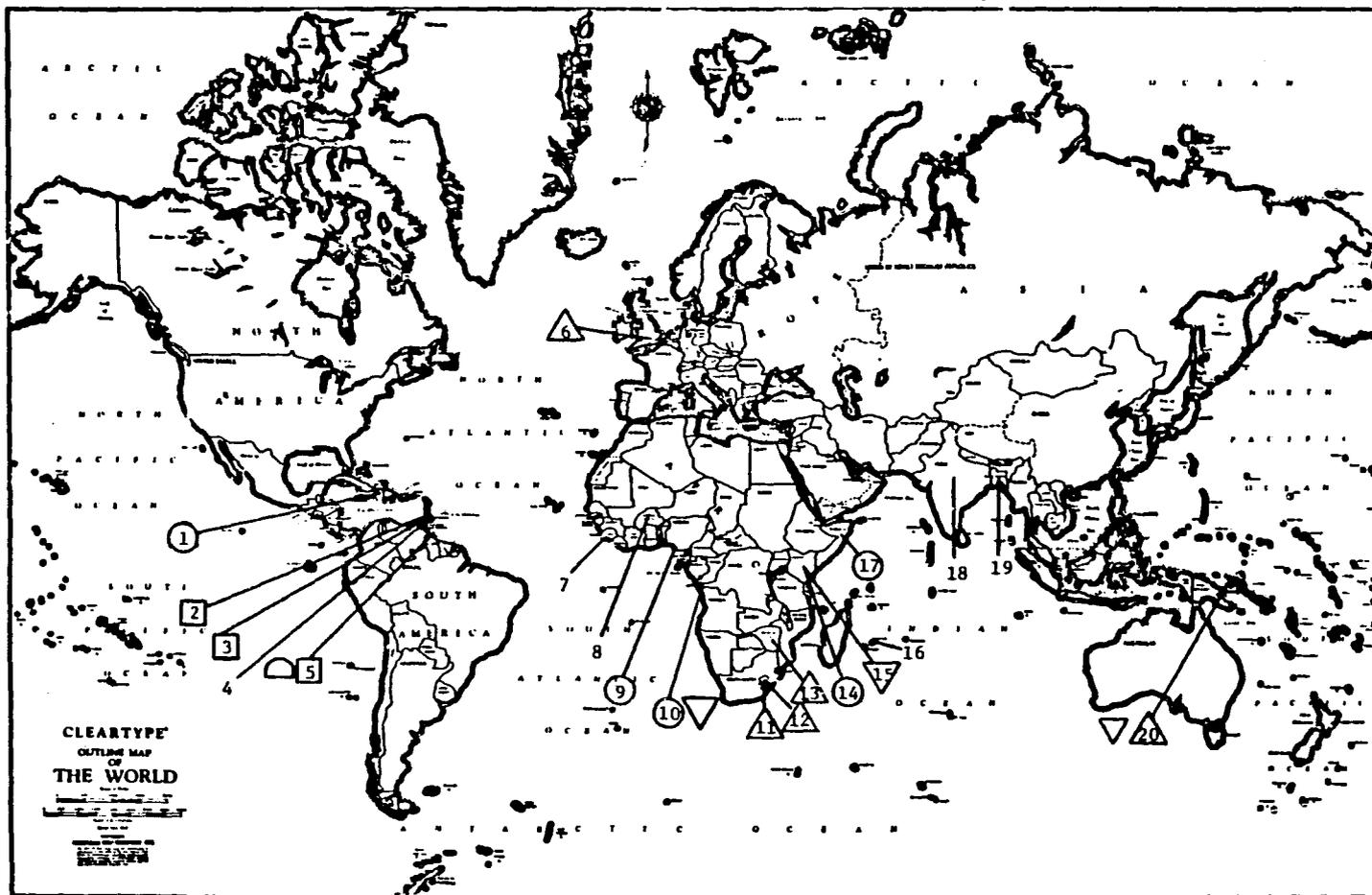
Informal, preliminary visit to discuss possibility of WIDTech assistance in 1983, request by ACOSCA.

(Conducted by Margaret Schuler, OEF Director of Women in Law and Development Project.)

Assistance made possible with funding from private sources.

WIDTech CLIENTS AND REQUESTS FOR TECHNICAL ASSISTANCE - YEAR 1

Period of: July 1, 1981 - June 30, 1982



- 1. Haitian Development Foundation *
- 2. St. Vincent National Council of Women*
- 3. University of West Indies*
- 4. Church Women United of Trinidad
- ◐ 5. Guyanese Craft Producers*
- △ 6. International Alliance of Women*
- △ 7. Sierra Leone Muslim Women's Association
- 8. Ministry of Social Welfare and Women's Affairs--Upper Volta
- 9. Planned Parenthood Federation of Nigeria**
- ▽○ 10. Refugee Women's Association of Zaire**
- △ 11. Lesotho National Council of Women**
- △ 12. University of Lesotho**
- △ 13. Zimbabwe YWCA**
- 14. International Planned Parenthood/Africa Region*
- ▽ 15. African Cooperative Savings and Credit Association*
- 16. Mauritius Country Women's Bureau
- 17. Somali Women's Democratic Organization*
- 18. ILO Vocational Training Center of New Delhi
- 19. Ministry of Social Welfare and Women's Affairs of Bangladesh
- ▽△ 20. North Solomons Women's Investment Corporation (PNG)*

* Year 1 clients
 ** Prospective clients for Year 2

KEY Funding Provided By:

△ USAID/Office of Women in Development

□ USAID/Office of Private and Voluntary Cooperation

◐ USAID/Country Mission

○ The William and Flora Hewlett Foundation

▽ Other--Client fees, private sources, etc.

Since June, applications for assistance have been coming to OEF as a result of the brochure mailing. We are receiving increasing numbers of requests that are being considered for assistance in Year 2. A report of requests received during June is given in the Appendix.

b) WIDTech Information Service

WIDtech also provides assistance to development organizations around the world through its Information Service on women-in-development. Mary Robinson, WIDTech Project Associate, aided by student interns and volunteers, researched and responded to nearly 100 requests for information in Year 1. Of these, more than half were from organizations and individuals working in the Third World; the remainder were from development professionals and researchers in the U.S. and Europe.

Requests are typically for descriptions of successful development projects for women, for guidance in designing and setting up community projects, and for information about other organizations providing assistance to Third World groups.

Much of the information used by WIDTech staff to answer requests is accessed from WIDATA, OEF's computer database on women-in-development. WIDATA is one of several specialty areas of DEVELOP, a database created by the Control Data Corporation (CDC). DEVELOP contains information on a wide range of development topics, such as agriculture and food production, business and industry, education and sociotechnological development, health and energy resources. Information units on these topics have been prepared by international development organizations with technical knowledge to share. Among the contributing organizations are OEF, Technoserve, Appropriate Technology International, Volunteers in Technical Assistance, and the Denver Research Institute. In return for submitting information in their areas of expertise, these organizations have been able to access the information base for their own use. DEVELOP became available to the public recently, via worldwide subscription and search services on a fee basis. OEF will continue to provide information units on women-in-development topics in exchange for access to the database in researching WIDTech requests for written information.

WIDTech staff also respond to requests for written information through the distribution of OEF publications and through customized library search services.

c) Production of Training Packages

In the first year, WIDTech staff and consultants developed workshop "packages" for short-term technical assistance in a number of content areas:

- o Analyzing organizational needs ⁴
- o Long- and short-range planning

⁴ Included in Appendix.

- o Project identification and design
- o Budgeting
- o Proposal writing⁵
- o Workshop design
- o Marketing research and management⁶
- o Women's economic development and family planning

Each package contains: 1) a content section for workshop facilitators, describing the technical information to be presented, 2) a training process plan, outlining the activities to be conducted, the setting and timing, resource materials needed, and notes to facilitators, and 3) a resources section, containing readings, exercises, visual aids, etc., to be used during the training.

What differentiates all WIDTech training materials from others available is that they are simple, appropriate for use by community-level groups, and are intended to impart the most important concepts during a short but intense technical assistance period.

Over the course of the WIDTech Project, the training packages will be field-tested a number of times in several different countries. In addition to serving the needs of WIDTech and other OEF staff, the materials will be published and sold at low cost to other development organizations.

3. Seed-Money Funds

The WIDTech budget also includes seed money, available to clients receiving WIDTech training/consultation. These funds enable clients to launch a new activity--often designed during or as a result of the WIDTech technical assistance--or to push to completion a stalled project. Criteria for funding and grant procedures were developed early in Year 1 and are included in the Appendix.

The Haitian Development Foundation was the first client to receive a seed-money grant, \$5,000 to start up the women's program. (Assistance to HDF was made possible with WIDTech/Hewlett funds.) The money is being used in part to pay for salaries of community workers, an expense which many funders are often reluctant to pay.

No awards of seed money in Year 1 were made under the WIDTech/AID grant. This is in large part because one of the major clients of the year, the

⁵ Included in Appendix.

⁶ First draft available after (September), 1982.

International Alliance of Women--being an international and not a Third World group--was not eligible for such a grant. Also, a Third World group which did receive assistance under this grant in Year 1 was not encouraged to apply for a seed-money grant. This organization, the North Solomons Women's Investment Corporation of Papua New Guinea, is relatively well endowed with funding from the provincial government. NOSWIC therefore did not meet one important criterion for funding, specifically that the intended beneficiaries have little or no access to other resources. It is expected that as the number of community-level clients receiving training/consultations from this grant increases, so will the number of seed-money grant applications which are received and awarded.

Assessment of Year 1 Activities

Major Strengths

- o Designed and put into place a number of management and program systems, including: criteria for organizations receiving technical assistance, seed-money grant procedures and criteria for funding, processes for assessing client needs, procedures for responding to requests for written information, steps for reviewing applications for WIDTech training/consultations, and guidelines for briefing/support for WIDTech training consultants.
- o Contacted large number of development organizations of WIDTech and invited them to apply for assistance, increasing pool of strong applicants for future.
- o Developed a number of training packages in the content areas most often requested as subjects of technical assistance.

Constraints/Difficulties

- o Grant activities late in getting started, since Project Director not in place until mid-September.
- o Large part of Year 1 effort under this grant was devoted to assisting one international organization. Expected follow-up work and collaboration with the organization's affiliates did not materialize as planned.
- o Initially, different interpretations with the funder of which clients might/might not be eligible for assistance hindered progress of technical assistance for indigenous groups. These differences have since been resolved.

Year 2 Plans

- Design new Implementation Plan for Year 2.
- Hold review session with Office of Women in Development Staff to discuss activities for first half of Year 2.
- Increase number of consultations for indigenous Third World organizations, in particular, community-level groups.
- Seek greater coordination and collaboration with USAID field missions, through offering more consultations, for example, with Mission staff.
- Increase number of seed-money grants awarded.
- Develop system for finding local (Third World) private support as a match to WIDTech seed money.
- Field-test training packages developed in Year 1.
- Develop additional training packages as needed.

FINANCIAL STATUS REPORT

(Follow instructions on the back)

1. FEDERAL AGENCY AND ORGANIZATIONAL ELEMENT TO WHICH REPORT IS SUBMITTED Office of FM PAD/FMA AID SA/12 Room 621 Wash., D.C. 20523	2. FEDERAL GRANT OR OTHER IDENTIFYING NUMBER WID-TECH OTR-0200-G-55-1137-00	OMB Approved No. 80-RO180	PAGE OF PAGES
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3. RECIPIENT ORGANIZATION (Name and complete address, including ZIP code) Overseas Education Fund of the LWV 2101 L Street, N.W. Suite 916 Washington, D.C. 20037	4. EMPLOYER IDENTIFICATION NUMBER 53-026-1050	5. RECIPIENT ACCOUNT NUMBER OR IDENTIFYING NUMBER 207-5510-2	6. FINAL REPORT <input type="checkbox"/> YES <input type="checkbox"/> NO	7. BASIS <input type="checkbox"/> ASH <input type="checkbox"/> ACCRUAL
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8. PROJECT/GRANT PERIOD (See instructions)		9. PERIOD COVERED BY THIS REPORT	
FROM (Month, day, year) 6-15-81	TO (Month, day, year) 6-16-83	FROM (Month, day, year) 4-1-82	TO (Month, day, year) 6-30-82

10. PROGRAMS/FUNCTIONS/ACTIVITIES ▶	STATUS OF FUNDS							TOTAL (\$)
	(a) Salaries	(b) Fringe	(c) Travel & Per Diem	(d) Subgrant	(e) Other	(f) Overhead		
a. Net outlays previously reported	\$	\$	\$	\$	\$	\$	\$	35,726.18
b. Total outlay this report period								21,096.00
c. Less: Program income credits								-0-
d. Net outlays this report period (Line b minus line c)								21,096.00
e. Net outlays to date (Line a plus line d)	20,800.94	6,930.36	5,090.54	-0-	9,425.14	14,575.20		56,822.18
f. Less: Non-Federal share of outlays								-0-
g. Total Federal share of outlays (Line e minus line f)	20,800.94	6,930.36	5,090.54	-0-	9,425.14	14,575.20		56,822.18
h. Total unliquidated obligations			3,000.00					3,000.00
i. Less: Non-Federal share of unliquidated obligations shown on line h			-0-					-0-
j. Federal share of unliquidated obligations			3,000.00					3,000.00
k. Total Federal share of outlays and unliquidated obligations	20,800.94	6,930.36	8,090.54	-0-	9,425.14	14,575.20		59,822.18
l. Total cumulative amount of Federal funds authorized	50,000.00	14,000.00	36,698.00	10,000.00	18,800.00	44,677.00		174,175.00
m. Unobligated balance of Federal funds	29,199.06	7,069.64	28,608.00	10,000.00	9,374.86	30,101.80		114,352.82

11. INDIRECT EXPENSE	a. TYPE OF RATE (Place "X" in appropriate box) <input checked="" type="checkbox"/> PROVISIONAL <input type="checkbox"/> PREDETERMINED <input type="checkbox"/> FINAL <input type="checkbox"/> FIXED	b. RATE 34.5 HTDC	c. BASE	d. TOTAL AMOUNT	e. FEDERAL SHARE
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12. CERTIFICATION
I certify to the best of my knowledge and belief that this report is correct and complete and that all outlays and unliquidated obligations are for the purposes set forth in the award documents.

SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL
Salwa Levsey
TYPED OR PRINTED NAME AND TITLE
Salwa Levsey, Controller

DATE REPORT SUBMITTED
8-5-82
TELEPHONE (Area code, number and extension)
202-466-3430

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APPENDICES

WIDTech Brochure

OEF 1981 Annual Report

OEF Catalogue of Reports, Surveys and Manuals

Trip Report: Technical Assistance for the North Solomons Women's
Investment Corporation (Papua New Guinea), June 7 - 25, 1982

Report of WIDTech Applications for Assistance, Month of June, 1982

WIDTech Training Manual: Assessing Organizational Needs

WIDTech Training Manual: Proposal Writing

Procedure for WIDTech Seed Money Grants



Overseas Education Fund

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XD-ANN-762-A
ISN 50450

Willie Campbell, *President*
Elise Fiber Smith, *Executive Director*

TRIP REPORT

TECHNICAL ASSISTANCE FOR

THE NORTH SOLOMONS WOMEN'S INVESTMENT CORPORATION

Arawa, North Solomons Province, Papua New Guinea
June 7-25, 1982

Conducted By:

Carolyn Gullatt
WIDTech Consultant



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TRIP REPORT

TECHNICAL ASSISTANCE FOR

THE NORTH SOLOMONS WOMEN'S INVESTMENT CORPORATION

Arawa, North Solomons Province, Papua New Guinea
June 7-25, 1982

Conducted By:

Carolyn Gullatt
WIDTech Consultant

Participants

<u>Name</u>	<u>Position/Job</u>	<u>Age</u>	<u>Status</u>
Agnes Titus	Welfare Officer	27	Married
Pauline Korokovo	Housewife	36	Married
Som Moshey	Welfare Officer	31	Married
Sahun Dash	Housewife/Business woman		Married
Regina Selep	Ex-student*	19	Single
Thecla Watlen	Ex-student*	19	Single
Nana Kasu	Student	17	Single
Anna Budia	Student	17	Single
Benedicta Maso	Student	17	Single
Gabriella Sibe	Student	17	Single
Dorothy Pagara	Student	17	Single
Norah Tom	Student	17	Single
Monica Karako	Community Development Officer	30	Single
Theresa Pippin	Housewife/Club leader	29	Married
Anna Ampaoi	Housewife/Club leader Business woman	42	Married
Jacinta Ninkonu	Housewife/Club leader	28	Married
Bibiana Taria	Housewife	28	Married
Agatha Hito (Participant-Observer)	Women's Project Coord.	32	Single
Elspeth Stivens	Women's Project Officer		Single
Elizabeth Hannett	Premier's wife/Club leader	32	Married

*slated to be trainers in the proposed sewing training and marketing center



Left to Right:

Row 1: Thecla, Elizabeth, Sahun

Row 2: Pauline, Dorothy, Regina, Som, Monica, Anna Ampaoi

Row 3: Benedicta, Anna, Theresa

Row 4: Norah, Gabriella, Agatha, Nana, Elspeth

Executive Summary

The following report is an account of the technical assistance provided by the Overseas Education Fund to the North Solomons Women's Investment Corporation, an indigenous organization having as its primary objective the promotion of women's participation in the economic and social development of North Solomons Province.

The technical assistance took place June 7-25, 1982, in Arawa, North Solomons Province, Papua New Guinea, and was carried out under a short-term consultancy contract.

The purpose of the technical assistance was two-fold:

- to provide field training and consultation for local women to enable them to more effectively work together to solve problems and achieve personal and community goals;
- to assist the participants to acquire knowledge/skills to enable them to more effectively control the finances of club and small business enterprises.

Under the guidance of the OEF Consultant and with the assistance of two participant-observers, approximately 60 hours of experiential learning in needs assessment/problem identification, problem-solving, and financial management was facilitated for 17 women of North Solomons Province. The approach to training was a non-formal one which, for most of the participants, was a new and challenging experience. The training methodologies used were varied, e.g., games and structured experiences, guided discussions, mini-lectures, etc. These were selected to maximize the involvement of the participants and to provide numerous opportunities for them to experience the planned learnings.

In-process and post-training assessment of the technical assistance by participants and participant-observers lead to the conclusion that, overall, the technical assistance was successful in meeting the needs reflected in objective number one:

- 94 percent of the women, at the end of training, felt they had acquired skills for working cooperatively with others to engage in project planning/implementation within their clubs and communities.
- 16 of 17 indicated that they had acquired sufficient knowledge/skills to enable them identify/define personal and community problems and to devise strategies for addressing them.

In addition to increased competencies, many of the women appear to have undergone significant personal growth as a result of their experiences in the training program. Indicative of that growth are comments such as:

- I learned to respect myself
- I now know a way to tackly my problems and its given me insight about the running of my life
- I now have courage to act and do things.

The evaluation results regarding the satisfactory achievement of objective number two are inconclusive. It is felt that an adequate instructional program was facilitated for the participants, however, the learning outcomes were not easily assessed. It is believe that many of the women did acquire increased understanding of the topics covered under the area of financial management but that before any real competencies are evident additional training is required. Such follow-up training should most appropriately be organized by the Women's Project Officer, Division of Commerce and/or the Women's Project Coordinator, Office of Provincial Affairs.

I. Background

The relationship between the Overseas Education Fund (OEF) and the North Solomons Women's Investment Corporation (NOSWIC) began in February 1981 when Paul Mitu, Provincial Business Development Officer, wrote to OEF on behalf of the members of NOSWIC, all of whom are women.

The North Solomons Women's Investment Corporation, established in July 1980, has as its primary objective the promotion of women's participation in the economic and social development of the North Solomons Province. At the time of the initial contact, NOSWIC had established and was operating a small business, a take-away food shop. As a second major enterprise, NOSWIC planned to establish a sewing training and marketing center for women with the aim of assisting the development of a village-based small-scale sewing industry. It was in connection with the planning for this activity that assistance from OEF was requested. Specifically, OEF was asked to review and offer constructive comment on the NOSWIC-prepared proposal for the establishment of the center.

In April 1981, OEF responded to the NOSWIC proposal offering suggestions for strengthening the project's effectiveness. OEF also provided various documents regarding proposal writing, budgeting, and project evaluation as well as case studies on OEF-assisted income generating projects in other parts of the world. Further, OEF expressed a great deal of interest in the project and a desire to explore other ways which the two organizations might be able to collaborate on the proposed project. In this regard, OEF provided information on the kinds of technical assistance it could offer to NOSWIC. Specifically mentioned was the possibility of a 2-3 week OEF-facilitated training course for local women.

Over the next several months, through an exchange of letters, OEF was kept apprised of the progress being made by NOSWIC toward implementation of the project proposal. In October 1981, Paul Mitu expressed a desire to have more information regarding an OEF-developed training methodology for assisting women to realize their potential and work together effectively in groups to achieve their objectives. The requested information ("Report on Non-Formal Education for Low-Income Women in Northeast Thailand") was provided by OEF in November 1981. On February 19, 1982, Mr. Mitu notified OEF of NOSWIC's desire to accept the offer of technical assistance, i.e., to arrange a 2-3 week training program to meet the specific needs of local women in North Solomons Province. To assist OEF in its efforts, Mr. Mitu committed K1500.00 (U.S.\$2070), an offer of free accommodations for the OEF consultant, and provision of all material supplies. On February 23, 1982, OEF confirmed that it would provide the training requested. Thereafter, preparations began for the technical assistance which is the subject of this report.

II. Planning for the Technical Assistance

Although the consultancy contract to provide the requested technical assistance was not negotiated and signed until May 17, 1982, planning, in the form of numerous discussions with OEF staff, began several weeks earlier.

Subsequent to the signing of the contract, the following planning activities were undertaken:

Pre-trip Planning

- Familiarization with client organization: purpose, activities, leaders/members, etc. Review of all correspondence between OEF and client organization.
- Study of Papua New Guinea with attention focused on political, economic, social and cultural concerns; discussion with PNG Desk Officer, Peace Corps; research in WID Resource Center, New Trans-century; independent reading of materials pertaining to country.
- Preliminary assessment of training needs of proposed participants based upon review of written information received from client organization and telecon with one of the in-country organizers of the training program.
- Preparation and presentation of preliminary workplan for the technical assistance. Discussion of workplan with WIDTECH Project Director, OEF.
- Preparation of preliminary training agenda. Presentation and discussion of training agenda with WIDTECH Project Director.
- Review/selection/preparation of training materials. Compilation of trainer's "tool-kit" for use in-country.

In-country Planning

Having departed the United States on the afternoon of June 7, the Consultant arrived in Kieta, North Solomons Province on June 9 at approximately 1545 hours after nearly 24 hours of actual flying time. The Consultant was met by Agatha Hito, Women's Project Coordinator, and Elspeth Stivens, Women's Project Officer.

June 10

- Get acquainted meeting with Agatha Hito and Elspeth Stivens. Introduction to Business Development Office staff.
- Introductory meeting with Paul Mitu, Provincial Business Development Officer.
- Planning team meeting with Agatha and Elspeth; spelling out of expectations; clarification of "Team" goals, etc.

- Familiarization tour of Kieta/Arawa towns. Visit to the training facility.

June 11

- Planning meeting with Agatha and Elspeth: presentation of tentative training plan for discussion and revision; preparation of logistics checklist and assigning of responsibilities for ensuring that all logistical considerations taken care of; acquisition of required materials and supplies.
- Meeting with Mrs. Rae Smart, Fashion and Design Instructor at Arawa Technical College and Manager-designate of the proposed sewing training and marketing center.
- Radio interview for the English-language channel of the provincial station.
- Preparation of the training site for the start of training: cleaning of the facility; organization of the training environment; preparation of visual aids for the training facility; etc.

June 12-13 (weekend)

- Continued planning and preparation for the start of training.

III. Chronology and Description of Activities

Under the guidance of the OEF Consultant, the technical assistance took place over a two-week period, June 14-25, 1982. Approximately 60 hours of experiential learning was facilitated for 17 participants. The participants ranged in age from 17 to 42, both single and married. In terms of roles and statuses, they were wives and mothers, students, community development officers in the provincial government, and leaders of local women's clubs.

The specific chronology of activities during this period is reflected in the training agenda presented as part of this section. A brief description of each day's activities follows.

Day 1: Introduction to Training

- Objectives:
- To welcome participants to training
 - To provide opportunity for participants to begin to know and work with each other
 - To provide an opportunity for participants to share their expectations for the training program
 - To match training program goals with expectations, ensure that they are clear and accounted for in the agenda

- Activities:
1. Registration of participants and informal coffee hour
 2. Formal welcome/introduction to training
 3. Get acquainted/ice breaker exercise
 4. Pre-training assessment of participants needs
 5. Goals/expectations clarification session
 6. Group planning for the training

Outcome(s): The first day's session ended on a very high note. Participants achieved a satisfactory level of comfort and rapport with each other and the facilitator. Participants shared and discussed their expectations for training, identified skills/knowledge they wanted to acquire, and identified specific problems they would like to work on during training course.

Objectives for and content of the first week of training established.

"Family" learning groups formed.

Day 2: Planning for Personal and Community Problem-Solving

- Objectives:
- To introduce participants to the process of of planning for problem-solving
 - To provide opportunities for participants to experience the problem-solving process

- Activities:
1. Mini-lecture
 2. Guided discussion
 3. Individual and small group exercises

Facilitator introduced the idea of planning for problem-solving. Individually, using situations identified on the first day of training as being problems/needs for them, the women set out to

specifically define the nature of their need or problem and to set a goal and at least one objective they wished to work toward with respect to that problem or need. In "family" groups, individuals share problem, goal, and objective statements with members of their group for feedback, clarification, and re-write, if necessary. Large group re-convened wherein individuals shared the products of their effort with the whole training group. Facilitator processed the activities and their efforts in light of information presented in the mini-lecture.

Outcome(s): All of the women made a serious effort to complete their problem, goal, and objective statements. More than half of them made great strides in this regard. Several stated that for the first time they had a clear understanding of what it means to set goals and objectives for themselves. Their clarity was evidenced when they shared their efforts with the larger group. A few other women, mainly the young students, had some difficulty with the activities initially but were helped along tremendously by the intervention of other members of their "family" group.

Day 3: Planning for Personal and Community Problem-Solving

Objectives: Same as for day 2

Activities:

1. Warm-up exercise
2. Review of previous day's activities
3. Mini-lecture
4. Community "Map" exercise
5. Obstacles activity
6. Guided discussion
7. Individual work on resources/obstacles part of problem-solving plans

Session started off with a warm-up exercise in which the women taught the Facilitator a simple song in Pidgin. Previous day's learnings were reviewed with the more critical points translated into Pidgin. Facilitator gave mini-lecture on mobilizing resources for and identifying obstacles to problem-solving. Participants engaged in learning exercises to reinforce the mini-lecture and continued individual and group work on the resources/obstacles part of their problem-solving plans.

Outcome(s): Participants continued work on problem-solving plans, identifying resources required for the implementation of their plans and obstacles which might interfere with their abilities to carry out their plans.

Day 4: Planning for Personal and Community Problem-Solving

Objectives: Same as for day 2

Activities: Completion of problem-solving plans took place during the morning session. In the afternoon session, participants shared individual plans for addressing problems or needs they identified as being important for them. Through guided discussion, facilitator processed the plans and the problem-solving efforts undertaken over the past three days.

Outcome(s): Each participant produced her own plan for meeting a need or problem that was important.

Day 5: Assessment

Objectives: -To provide an opportunity for participants to assess the learnings acquired during the first week of the training program.

-To provide an opportunity for participants to assess continuing needs and plan for the second week of training

Activities: In large group, reviewed the goals, expectations, objectives established on the first day of the training program. Participants then moved into "family" groups to discuss among themselves the conduct of the first week of training and to assess the effectiveness of course thus far in meeting their needs.

In the afternoon session, participants met in "family" groups to identify learnings they wanted to concentrate on during the second week of training. The results of "family" group discussions shared with larger group.

Outcome(s): Assessment of the first week of training completed.

Objectives and content for the second week of training established.

Day 6: Book-keeping

- Objectives:
- To introduce participants to basic principles of book-keeping: setting up a cash book, recording transactions, etc.
 - To provide opportunity for participants to practice basic book-keeping principles

- Activities:
1. Warm-up exercise
 2. Mini-lecture
 3. Guided discussion
 4. Practical exercises in basic book-keeping

Through guided discussion and mini-lecture, facilitator introduced participants to the concept of financial record-keeping: need for records, kinds of basic records appropriate for small businesses and women clubs. Using visual aids, facilitator demonstrated the setting up of a cash book page, identified kinds of information to be entered, and illustrated how transactions should be entered, etc. Participants completed practical exercises and problems designed to test their comprehension of the principles taught.

Day 7: Profit-Loss Accounting

- Objectives:
- To introduce participants to basic principles of profit-loss accounting to enable them to calculate profit or loss for their small business and club enterprises.
 - To provide opportunity for participants to practice the calculation of profit or loss.

- Activities:
1. Mini-lecture
 2. Demonstration
 3. Problem-solving exercises

Through mini-lecture and demonstration, facilitator introduced participants to some basic principles of profit-loss accounting and the calculation thereof. Facilitator set up a number of problem situations related to small business and club enterprises which the participants, based on their understanding of the principles taught, had to solve.

Day 10: Proposal Writing
Assessment
Close of Training Ceremony

- Objectives: -- To introduce participants to the mechanics of proposal-writing
- To provide opportunity for participants to assess the two-week training program
- To celebrate the end of training and to recognize the efforts of the women during the course

Activities: Through guided discussion and demonstration, facilitator introduced participants to the mechanics of proposal-writing, i.e., relating proposal-writing to planning for problem-solving; identifying/ defining components of a proposal, etc.

Participants completed a written evaluation of the two-week training course.

Provincial Minister of Education gave the close of training speech and presented certificates of completion to participants.

Day 11: A Mumu

The women planned and implemented a traditional feast and evening of sing-sing to celebrate the end of training and to farewell the training facilitator. Invited guests included the spouses of the participants, the Premier of the North Solomons Province, and others friends/members of the community who had been instrumental in making the training course and the stay of the facilitator in-country a successful one.

IV. Evaluation of the Technical Assistance

The Plan

A plan of evaluation was designed wherein opportunities were provided for participants to continually assess their own learnings, and to assess the overall effectiveness of the training program in accomplishing agreed upon objectives. To facilitate such assessment, participants were encouraged to keep a daily journal of their experiences and feelings which they could refer to as they progressed through the program. At the end of the first and final weeks of the training program, participants completed written assessments of their own learnings.

A second part of the evaluation plan involved the use of two participant-observers to assist in assessing the overall impact of the training program and the role of the facilitator in helping participants to achieve the learning objectives established. At the end of each day's training, a clinic session was held wherein the participant-observers and the training facilitator met to give feedback, evaluate the learning outcomes as well as the processes, administration, and coordination of the day's activities. Problems, if any, were identified/discussed and plans for addressing them worked out.

The third part of the plan involved a self-assessment by the training facilitator of her efforts to create and implement a systematic training design based upon adult learning principles.

The Results

Data obtained from the various assessments undertaken clearly indicate that all of the participants were affected positively by their involvement in the training program. The degree to which they were affected, however, varied among individuals as is to be expected when one takes into consideration differences in experience and knowledge each originally brought to the learning situation.

The effects of the program on the women are reflected in changed attitudes about themselves and in their perceptions about what they are capable of doing in terms of skills.

When asked to list things they are now able to do as a result of the training, the women responded thusly:

-- 94% work cooperatively with others: This represented a big step forward for many of the women. One of the critical problems identified during the course was the fact that many of them felt frustrated in their club work because of the lack of cooperation among members. As a result of this lack of cooperation, some clubs had disbanded, others were inactive, and, in others, club projects were difficult to get off the ground and/or unsuccessful. The

women felt that they could use the skills (listening, sharing, etc.) gained while planning and working together during the course to help the women in their clubs work together more effectively. They felt that their working together in "family" groups during the course had taught them the value and benefits to be gained through cooperative effort.

-- 16 of 17 share ideas; express what I feel freely: In the initial stages of the training program, some of them were very shy and reluctant to express themselves, others tended to undervalue their thoughts/feelings when expressed. The students, because of their relative youth, were particularly reluctant to contribute in an active way and often had to be drawn out. One of the values of the training course is that it provided a supportive, non-threatening environment in which the women could express themselves and test their ideas. All of them made great strides in this aspect of their behavior. Feedback from some of the women's husbands indicated that this change in behavior had been noticed by them. They seemed to view it favorably.

-- 16 of 17 make a plan to solve my problems; solve problems: Planning for problem-solving is not something that was routinely a part of the behaviors of most of the women. The fact that nearly all of them felt that they now have some ability in this regard is significant. That these skills were developed to some degree is evidenced by the fact that all of the women, except one, identified a problem that they wished to work on; they set goals and objectives for themselves; and, worked out a step-by-step plan for achieving their objectives.

In addition to increased competencies, many of the women appear to have undergone significant personal growth as a result of their experiences in the training program. Indicative of that growth are comments such as:

- I learned to respect myself
- I now know a way to tackly my problems and its given me insight about the running of my life
- I now have courage to act and do things

The first objective of the technical assistance was to provide training for the women of North Solomons Province to enable them to more effectively work together to solve problems and achieve personal and community goals. It is believed that that objective was satisfactorily fulfilled.

The evaluation results regarding the satisfactory achievement of objective number two are inconclusive. It is believed that an adequate instructional program was facilitated, given the circumstances, but that the learning outcomes were not easily assessed. Although the women themselves felt that they had acquired a greater understanding of the topics covered - and many of them did- the fact is that for several others of

them a great deal of follow-up and additional training must be done if they are to have real competencies in some of these areas.

During the planning for the second week of training, the women identified the specific knowledge/skills they required under the topic of financial management, i.e., book-keeping, profit-loss accounting, budgeting, and retail-pricing. They also wanted to have specific information regarding two un-related topics, i.e., banking, and how to write project proposals for submission to funding sources. Without a doubt, this part of the training course was the most difficult both for the participants and for the training facilitator, particularly with regard to the topics of profit-loss accounting and retail pricing. The mastery of these two skills required certain prerequisite knowledge/skills which the majority of the women lacked. Although efforts were made to address these needs before attempting to transfer the new skills, for several women, such efforts were only minimally successful. Despite this, however, this part of the course did illustrate to the women the critical importance of sound financial management in small business and club enterprises, and identified areas of need still requiring further development if they are to be successful in the setting up and implementation of income-generating projects.

PARTICIPANTS REACTION FORM

1. WHAT WERE THE MOST VALUABLE THINGS YOU LEARNED DURING THE FIRST WEEK?

- 12 how to solve problems; I now know of a way to tackle my problems and its given me an insight about my running of my life
- 5 how to cooperate with other people
- 1 that other women in other countries have similar problems to us
- 1 Discussions and activities have helped me to identify some of my weaknesses
- 1 meeting with other women and lessons learnt from other women
- 1 courage to act and do things

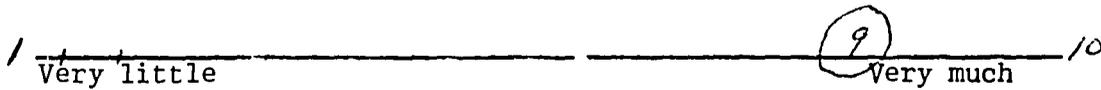
2. WHAT WERE THE LEAST VALUABLE THINGS YOU LEARNED DURING THE FIRST WEEK?

- 11 nothing not valuable; everything was of value
- 2 can't decide yet
- 1 because of language problems didn't learn much
- 1 role play exercises
- 1 lesson on identification of obstacles to problem-solving. It was not clear.
- 1 difference between goals and objectives still not clear

3. LIST THE THINGS YOU FEEL YOU ARE NOW ABLE TO DO AS A RESULT OF THE FIRST WEEK OF TRAINING.

- 16 share ideas; express what I feel freely
- 16 work cooperatively with others
- 15 identify problems; to know what a problem is
- 16 make a goal for myself; write clear goals
- 17 make a plan to solve my problems; solve problems
- 1 respect myself
- 1 know who I am
- 1 to set up my own project
- 13 make a good objective; write objectives for my goals

4. HOW USEFUL WAS THE FIRST WEEK IN HELPING YOU TO GROW PERSONALLY?



5. HOW GOOD DO YOU FEEL ABOUT THE THINGS YOU HAVE ACHIEVED OR LEARNED OR GAINED FROM THE FIRST WEEK?

10 Very Good

7 Good

0 Not Good

6. WAS THERE VALUE OR SOME BENEFIT WORKING TOGETHER IN "FAMILY" GROUPS? WHY? WHY NOT?

16 "YES"

1 "NO"

- we helped each other
- because we learnt what other people's feelings or emotions are
- another way of clarifying to each other what Caroline was saying
- because we each contributed ideas which were useful
- helped to develop courage and confidence
- as young students we have learned alot by listening to the older and more experienced women in sharing their ideas and by being given a chance to participate in the family group activities
- cooperation
- equal distribution of work
- family group experience helped me to be able to deal with a much larger group back in the village
- the family group has further strengthened in my mind the importance of getting more participation through asking questions. Also leaders should not be too dominant.

- it wasted time to discuss thing in small groups first

APPENDIX E

As part of the final course evaluation, participants were asked to write a letter to another woman friend telling that person about the training course they had just completed. They were to describe the course and tell something about what the course has meant to them.

Attached are samples of these letters.

Dear Tina,

I am writing to you to tell you how happy I am for attending the two-week training program Caroline provided for twenty of us women here in Arava. It has been most unfortunate for you to be unable to attend as the training program has been very valuable. This is why I would like to relate to you what I know I have learned in the training program.

The major obstacle in us P.N.G. women is the lack of belief in ourselves and our worth. Through the training program, I have learnt on realised to respect myself and my abilities and potentials and capabilities. I accept my value now and this came about when we learnt the "Problem Solving Process". Things make sense to me now. Because I cannot relate

very much to you in this letter, I will stress the parts I know are important to you. Because you have told me in your last letter about the failure of the members doing club activities and their distrust in you with their money, I will mention here some activities we did in the training program which you can also apply. First you must clearly define the problem your club is facing, then you set your goal and objectives. Then you identify what will or can work your way and (resources) and what may stop you. When you have done that then you draw up your plan. The most important thing you must remember is to involve the club members in your decisions.

Because I cannot describe much in my letter I will be visiting you for a couple of weeks ^{on annual leave this time} and I plan to help you set up your women's club once more using

I really feel now that I can ~~now~~ get down to the grass roots and share my knowledge both with the women and youths in my District. The most rewarding activities things were getting into smaller teams/groups to work on sample exercises. So through actually doing the thing my knowledge broaden.

Another one of the greatest obstacles in the everyday life is the Financial Management. As I personally ~~don't~~ ^{didn't} know much about it before the course I couldn't be able to help the people that I'm working with, but after today I'll be able to help them how to manage + budget their money.

So after attending this Training Programme many of my problems are solved, my own knowledge as a Field Officer has broaden and now I can really get to help my community member well since I have the know how.

Yours Sincerely

Monica Karabo

District Office,

P.O. Box 34

BUN - NSP

PNG.

25th June, 1982.

Dear Juno,

I was on a two week patrol in Siwai visiting women's and youth clubs when the PCSO, Ma Malaku Anqu got me over the communication radio in Konga and told me that it would be good for me to attend a course in Arawa been conducted by Commerce and someone from USA. I was also told that I had to find my own transport and arrange for my own accommodation for two weeks. Being told that and seeing myself as a Government Field Officer I was really frustrated at arranging for my own transport and accommodation. I was not even told what the course was all about. So I was really hesitant to attend the course. Five days before the course actually started when Agatha Hito told me that I could stay with her I agree. This was really out of curiosity. I just wanted to find out what the course was all about.

- But after participating in the course for two weeks I have ~~to~~ come to gain a lot of knowledge and also solve a lot of my own personal problems. Before this training programme I was in the dark about Planning + ~~management~~ ^{management}. I never knew that it would take ~~of~~ one through quite a few steps before one came to Planning + management. So what! I know now how to identify and define a Problem how to set a goal + objectives, the resources + obstacles involved and the actual planning. 3

plan.

In the training program, we not only learnt the Problem solving Process, we also learnt a great deal about Financial management. I felt that these two parts of the training program were well suited to each other. As you said in your last letter that the women did not trust you with their money; well, when I teach you what I learnt about Financial management, I know you will gain their confidence. It is really simple. I am looking forward to seeing you in two weeks time.

Yours sincerely,
Agnes Titus

Dear Maria,

I have just undergone a two week women's 'training course' in Shava, conducted by Miss Caroline of the OEF based in Washington DC. There were 20 participants altogether, all of whom are connected with various kinds of women's groups in the province.

On the first day I felt a bit shy of some of ^{my} the colleagues and also my teacher Caroline. However this was overcome as I progressed through the week. I'm very happy that I've attended this course, because I've learned a lot of things which I didn't know before.

Some of the things covered in the course are the 'Problem Solving Process', which has been very new to me. - This is identifying the problem - setting the goal and having the objectives. - From learning this I feel I'm now able to solve my own problems. I've also learned Book Keeping; Budgeting; Cashing of goods, and other basic ways of how to go about in financial management. There was also a spokeswoman from the P.N.C.B.C., who talked about banking. We asked questions too. She talked of the many things that I didn't know before.

I hope to set up a "Chicken project" back in the village and to put into practice what I've learnt in this course. I will also let you know the progress of the project.

Your friend
Theresa PIPPIN

Anawa Inon

25th June 1982

Dean Okito,

I am writing to tell you my personal feeling before and after the Training Course. On the first starting days I was wondering how this course will help me and could I learn. We have never been on heard of this kind of course anywhere in P.R.G.

I like the ways we put our problems, goals in acting in groups. Because by doing this we see our real problems and see very clearly how to solved them. In gathering together in groups I found out that we could very easily help each other on the women's club.

Another thing is financial management which we don't do properly in our clubs. So in being in the course I could now see the movement of the money whether if its personal or club money.

After I leave - after the course I'll help the clubs with both two things I've learned. In my ~~area~~ area we have eight women's club. I'll help these clubs to take care of their money, and solved the problems by using the method I learned in the course. I am very very please with this course or in being in the course. Perhaps I see this is the real gift given to us by our Heavenly Father through Home Affairs. Because this is the sort of course we been longing for.

Yours Faithful

Office of Women's Affairs
P.O. Box 120
Ankara
25-6-82

Dear Celestine,

This is just to share with you some of my experiences before, during and after the course which we are just finishing today.

My work puts me in an awkward situation, where many times I have to do things whether I want to do them or not. Many times I have to deal with government officials of very high rank. Too often I was afraid to approach them because I didn't have any confidence in myself about how to express the things I want to talk about. Many times I had problems in doing my work but I didn't know how to solve them, so I often had feelings of dissatisfaction lingering in me.

Often I denied the fact that I have some abilities to work effectively. This was simply because I did not know how to use them.

When I was helping Elsie to prepare everything for this course I was just wondering what the course would be like, whether it would be worth attending it.

When the course had started and we had completed the sessions of the first day I had a feeling of relief and I was enthusiastic about the whole course. When I learned the Problem-Solving Process I gained great confidence in myself. I felt that I could now identify a problem, and write a problem statement.

I learned to write a goal statement and list objectives. Also I learned to list resources.

and obstacles. I learned to make an action plan step by step. The knowledge of Problem Solving Process is what I lacked before the course.

I am so happy and confident that now I can identify a problem and follow all the steps to solve it.

Also the sessions on Financial Management has helped me greatly. I feel that I can help the women with their financial management now. The sessions on seeking financial assistance and Proposal writing is of special interest to me because in my work I will have to be doing that. I am so grateful to learn how to write a proposal because in the near future I will have to write a proposal to the Provincial Government for next year's finance for my office.

Finally I wish to say that I am one of the luckiest women who have undertaken a course which is first of its kind in this Province, which helped me to identify myself, my abilities and helped me ^{to learn} how to co-operate with others. I certainly will make the best possible use of this training course in my future and present work.

With thanks from
Miss Agatha Fido
Provincial Womens Coordinator

Danapoa Women's Association.
P.O. BOX 364 Araua
25/6/82

Dear Miriam,

Greetings from Auntie Liz. How are you and the kids. I'm sure you're all enjoying Madang. It's a lovely place. We loved working there last year.

I have been very busy for the last two weeks attending a very special ^{course}, I'm glad to have been one of the participants. I thought at the beginning, that it would be like the other previous ^{women's} courses that we have had, however I've found this course ^{has} been quite different.

One of the most important subjects taught is the Problem solving process. I feel more confident after going through, discussing it, with the lecturer and other participants. I never really knew how to handle problems. Many times I've not faced my workers when they upset me. I've always let Leo solve their problems, most of the times. Now I know the process and will be able to face problems.

Another subject we studied was Financial management. We learnt some very important things such as Budget, Retail Pricing, Financial Reports, Balance sheets ~~and~~ etc. This will also help us as many clubs in the Kieta District want to raise funds but usually don't know how to make plans and also have problems of making clear financial reports. This gives me a clear picture of why many of the past projects did not work out as the clubs "

I'm abit sad many more women especially those actively involved in women's clubs and small businesses were not able to attend. I think this is due to lack of finance. However, maybe the women's co-ordinator will organise smaller workshops to get Leaders of groups to learn especially the Problem solving process. In any way, don't miss any chance of attending if this type of course is ever organised in Madang. You will value it.

Give my regards to Nelson.

Love and God Bless you.

Your Auntie Liz.

PARTICIPANT-OBSERVERS REACTION FORM

1. HOW DO YOU FEEL THE PARTICIPANTS REACTED TO THE SESSION?

Day 1

P-0₁: Surprised/pleased to see how receptive the women were to the exercises they were asked to do. I had expected a greater degree of shyness and self-consciousness to prevail during this first day. The get acquainted exercise was taken much more seriously by the women than I had expected. The women seemed to be very relaxed during the whole session.

P-0₂: In this first session I felt the women were eager to do the activities. They seemed to enjoy the learning activities

Day 2

P-0₁: Overall, I thought that the session cleared up areas of long-standing confusion for the women over the meaning of the words used in planning and problem-solving (goals, objectives, etc.). Several women took big steps forward but a few were left behind and I am sure that the reason for this was their limited understanding of the terms used.

P-0₂: In this session again the women took active part in the discussions and in the exercises. They were able to write out their own problem statements which showed that they understood.

Day 3

P-0₁: The translation of the main points of problem-solving into Pidgin was a good idea and very probably was a big help to the students and village women. Everybody seemed to find the identification of resources exercise easy. Nobody seemed to find the obstacles identification confusing. Both exercises were good thinking activities for the women.

P-0₂: The women were quite attentive during the review of the previous days learnings on the problem-solving process but some of them thought it was a waste of time to conduct the review in Pidgin and English.

Day 4

P-0₁: I think the women really had a sense of achievement once they had completed their problem-solving plans and shared them with the larger group.

During the role plays I had the feeling that the women were missing the point. They couldn't seem to understand that they were supposed to be acting out real situations. I think the whole concept of translating a real situation into a hypothetical act is a hard concept for them to grasp, though I don't know why.

Day 5

No team clinicing done on this day.

Day 6

P-0₁:

The basic book-keeping methods taught were simple enough for the majority of the women to understand and for this reason they remained interested throughout the session. I think that many of the women were relieved to get their teeth into something more concrete after the previous week's activities.

P-0₂:

I felt that the participants found the session difficult but most of them tried very hard and understood most of it in the end.

Day 7

P-0₁:

Profit-loss accounting and balance sheets was something they were all keen to learn, except perhaps a few of the Tech students. I thought that the session was presented by Caroline especially well and there seemed to be very few occasions when the majority were confused. Some of the women had difficulties doing the mathematical calculations. I think this was because they were not thinking hard enough about what they were doing rather than a failure on the part of Caroline's instruction.

P-0₂:

I felt on the whole that the women were unsure of what to do. Several of them, however, managed to get the idea and helped others who found it too difficult to understand.

Day 8

P-0₂:

I feel the women took an active part in the whole session. Most women found the calculations required to do retail pricing quite easy once they knew how to apply the appropriate formulas. The session was of special interest to those women who had small businesses.

Day 9

No team clinicing done on this day.

Day 10

P-0₁:

The session on proposal-writing went extremely well. The women were obviously keen to find out how to get assistance from external sources. I think they were surprised to learn that it was another application of the problem-solving process. I was surprised at the extent of their understanding of donor organizations - which came out in the exercise when they identified what the organization would want to know from a proposal.

2. WHAT WAS DONE WELL?

Day 1

P-0₁: I thought that the sequence and timing of the exercises was the main reason for the success of the day's activities. Also, Caroline's relaxed and informal way of presenting herself and starting the session warmed the women to her immediately. This had the effect of making the women receptive to what was to come and Caroline further accentuated the effect by making it so clear that the course would be designed to meet their individual and group needs - which the women instantly appreciated. Another valuable point was the way Caroline explained why she had conducted the session the way she had and done the exercises she had done. This is not often done by adult education teachers and I think that it involved the women to some extent in the planning process being done for the course, thus demonstrating the value of working as a group immediately.

P-0₂: The icebreaker/get acquainted exercise was done very well. It helped the women to feel comfortable in a new situation. The fact that Caroline joined in this activity with the women also helped them to feel comfortable.

Day 2

P-0₁: As in day one, I thought that the sequence of events and the overall presentation by Caroline was ideal for approaching this confusing subject.

P-0₂: The mini-lecture was done well. The fact that women were able to write out their own problem and goal statements and then the objectives showed that they understood.

Day 3

P-0₁: The whole day seemed to go quite well. Most of the women seem to be progressing satisfactorily toward the completion of their problem-solving plans.

P-0₂: The identification of resources and obstacles exercises were well done. The women had no problems in these activities.

Day 4

P-0₁: Sharing of their personal problem-solving plans with the larger group. The women who shared their efforts were pleased and filled with a sense of achievement.

Day 5

No team clinicing done on this day.

Day 6

P-0₁: The session was well presented. The learning activities for the women were very effective- mainly because they were relevant to the women's situations (club/small businesses).

P-0₂: Caroline's demonstration of simple book-keeping methods which the women could use in the control of club or small business money was well done. I thought Caroline's efforts^{to} do the session in Pidgin was good.

Day 7

P-0₁: I thought that the session was present^{ed} especially well.

P-0₂: I felt the demonstration by Caroline about profit-loss accounting was well done.

Day 8

P-0₂: The whole session on retail pricing was done well.

Facilitator's Note: Many of the women specifically requested that a session on retail pricing be included in the part of the training dealing with financial management matters. Because the facilitator had absolutely no expertise in this area, the session was guided by Elspeth Stivens, one of the participant-observers. Her session was well-prepared and presented. She provided the women with adequate opportunities to practice the calculation of retail pricing.

Day 9

No team clinicing done on this day.

Day 10

P-0₁: Well presented. No other comments.

3. WHAT COULD HAVE BEEN DONE BETTER? WHAT DIFFICULTIES OR PROBLEMS OCCURRED?

Day 1

P-0₁: I did not notice any major problems. However, I did think that the women who do not have fluent English and/or do not speak English much in their daily lives were finding it hard to keep listening during the afternoon session. This may mean that we need to make afternoon sessions shorter or not such a heavy session. We should be able to make a definite decision on this after the third or fourth day of the course.

P-0₂: On the whole there were no difficulties occurring but a few women seemed to be tired at the end of the session.

Day 2

P-0₁: I didn't see any major problems in the way the session was conducted. However, because the Arawa Tech students are young and shy and tend to try to stay together we should be pushing them for more active participation and interaction in their family groups. Otherwise, there is a chance that they will begin to feel incompetent and therefore be even more reluctant to speak and participate.

P-0₂: Planning for problem-solving is a new experience for most of the women and it took some of them a long time to understand what it means to set goals and objectives.

Day 3

P-0₁:
P-0₂: No particular difficulties or problems noted in the conduct of the day's session.

Day 4

P-0₁: Would not recommend the use of role plays and acting out as a method of teaching again in the course. The women tend to get so involved in the task of producing a skit that they forget what the purpose of the activity is.

P-0₂: The difficulty I have noticed was the fact that the women were not really acting the village situations in the role plays. This happened because these women have more confidence than the actual village woman

Day 5

No team clinicing done on this day.

Day 6

P-0₁: Although most of the women seem to understand what's involved in balancing a cash book when the transactions recorded occur over a short time, i.e., a few days, they seem to become confused when dealing with transactions occurring over a longer period of time.

Day 7

P-0₁: Some of the women appeared to have problems with the calculations while trying to complete the problem exercises. I think this was because they were not thinking hard enough about what they were doing rather than a failure on the part of Caroline's instruction.

P-0₂: I felt the problem-solving exercises in profit-loss accounting could have been made simpler for the women. They appeared to be too complicated.

Day 8

P-0₁: We were fortunate in getting a pleasant person from PNG Bank to conduct the session on banking and to answer the questions that the women posed. It was a shame that she didn't have more of an instructive way of getting information across - making it necessary for Caroline to intervene and stress/clarify several points.

Day 9

No team clinicing done on this day.

Day 10

P-0₁: No particular problems or difficulties during this session. The session itself was adequately prepared and well presented.

REPORT OF WIDTech APPLICATIONS FOR ASSISTANCE

Month of June, 1982

REPORT OF WIDTech APPLICATIONS FOR ASSISTANCE

Month of: June, 1982

Date Rcvd	Organization	City/Country	Assistance Requested	Recommendation/Rationale	Action Taken/Planned	End of Month Status
6/7/82	Africa Cooperative Savings & Credit Association (ACOSCA)	Internat'l Org., headquartered in Nairobi, Kenya	1. Community Needs Assessment 2. Organizational Analysis 3. Workshop Design	Maybe-would like to work with a credit organization; Marge Schuler could conduct & also look into WLD/Kenya.	Called 6/18 to propose trip next month. They can't convene their members (trainees) before March-April 83. Possible first visit in August 82 before Zimbabwe (see below).	Awaiting their confirmation of proposed 1st visit. Need to decide if ACOSCA really an appropriate group; they are different reports.
6/14	YWCA of Zimbabwe	Harare, Zimbabwe	1. Project I.D. & Design 2. Project Budgeting 3. Financial Mgmt.	Yes-seems the Y does a lot of work with income generation for rural women. Also would fit with Marge's WLD/Zimbabwe efforts.	Called 6/24 to propose trip this summer. They agreed to August 15-30. Marge will conduct training as requested.	Awaiting letter of confirmation from them plus bios for trainees.
6/14	Church Women United	Marabella, Trinidad	1. Community Needs Assessment 2. Project Implementation 3. Organizing Coops	To be determined.	Hortense Dicker will meet with them during OEF Caribbean program development trip, July 4-31.	No further action to be taken until August, after Hortense's report.
6/14	National Council of Women	Maseru, Lesotho	1. Business Skills for Entrepreneurs 2. Proposal Writing 3. Project Impl. 4. Journalism	Maybe-would fit in with Africa program development strategy.	Need to determine whether/when will assist group, then call them.	Decision to be made in WIDTech/Program Dev. Meeting 7/7/82.
5/18	Kankalay-Muslim Women's Assoc.	Freetown, Sierra Leone	1. Long/Short Range Planning 2. Resource I.D. 3. Project Implementation	To be determined.	Need to determine whether we should assist group; notify them.	Decision to be made in WIDTech/Program Dev. meeting 7/7/82.
6/19	African Adult Education Assn	Nairobi, Kenya	Request for more WIDTech brochures to distribute to their members.	Send brochures		50 brochures in English and French sent 6/24/82.

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REPORT OF WIDTech APPLICATIONS FOR ASSISTANCE

Month of: June, 1982

Date Rcvd	Organization	City/Country	Assistance Requested	Recommendation/Rationale	Action Taken/Planned	End of Month Status
6/21	SOLIDARIOS	Santo Domingo, Dominican Republic	Request for more WIDTech brochures to distribute to its 14 member organizations in Latin America & the Caribbean.	Send requested brochures		Brochures to be sent after applications are revised and reprinted.
6/22	University of West Indies	Kingstown, St. Vincent	1. Proposal Writ- ing 2. Long/Short Range Planning 3. Marketing Research	To be determined	Hortense Dicker will meet with them during OEF Caribbean program development trip, July 4-31.	No further action until August, after Hortense's report.

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Overseas Education Fund

2101 L Street, N.W., Suite 916 Washington, D. C. 20037
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Willie Campbell, *President*

Elise Fiber Smith, *Executive Director*

WIDTech TRAINING MANUAL

Topic: ASSESSING ORGANIZATIONAL NEEDS

(First Day of WIDTech Field Consultation)

Materials Developer:
Margaret Schuler

June, 1982



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Materials Developer:
Margaret Schuler

June, 1982

OBJECTIVE: To facilitate the local group's own diagnosis of its organizational and/or training needs.

OUTCOME: { Information needed to plan consultancy; Clarity on the objectives and roles in the consultancy;
Clarity on the relationship between the request and the needs of the organization.

Time	Topic/Activity	Suggestions for Consultant's role	Resources/Materials
15 mins	<p>1. <u>INTRODUCTIONS</u></p> <ul style="list-style-type: none"> -After you have been formally introduced, explain why you are there and who you are. -Expalin the importance of the first meeting for both you and them to mutually agree on the scope of work, the focus, the expected outcomes, etc of the consultancy. -Ask the participants to introduce themselves and tell what thry do and what their role is in the organization. 	<p>Set the tone of seriousness and establish rapport with the group.</p> <p>Assess leadership patterns and level of participation in group.</p>	<p>Meeting room appropriate to the size of group</p>
	<p>2. <u>GETTING TO KNOW THE ORGANIZATION</u></p> <ul style="list-style-type: none"> -Give your perceptions of what the group is and what its purposes are, plus any other observations you think would be useful. -Ask for <u>feedback</u>, clarifications, corrections, additional information, etc. to your perceptions. -At appropriate moment, write the following headings on newsprint: <ul style="list-style-type: none"> "Mission" "Goals" "Programs" -Fill in group responses under appropriate headings. -Ask them how they are structured or organized. and explore with them their structures in relation to their mission. 	<p>You will have some background on the group from OEF and from the prior meeting with the local "convenor."</p> <p>You are more likely to get fuller group participation and more accurate responses by asking them to correct your perceptions. If you just ask them to tell you about the group, the "authority" figure is more likely to respond.</p> <p>Help focus discussion, note consensus responses. Keep in mind any discrepancies.</p> <p>The mission/structure issue may provide insights for subsequent dis-</p>	<p>Newsprint, pens (or blackboard if newsprint is unavailable)</p>

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OBJECTIVE:

Time	Topic/Activity	Suggestions for Consultant's role	Resources/Materials
	<p>3. <u>GENERAL ORGANIZATIONAL NEEDS IDENTIFIED</u></p> <p>-Ask individuals or small groups to respond to the following questions:</p> <ol style="list-style-type: none"> 1) Where would you like to see the organization go from here? 2) What do you think the organization needs to get there? 3) What are the main problems or obstacles the organization needs to overcome in order to get there? <p>-After questions are answered, put three headings on the newsprint:</p> <p>"Where do we want to go?"</p> <p>"General Needs"</p> <p>"Problems or obstacles"</p> <p>-Then conduct the discussion:</p> <ol style="list-style-type: none"> 1) Listen to responses for a few minutes 2) List those responses reflecting general agreement under the three headings 3) List differences of opinion or minority opinions after the general agreements 4) Ask them why they asked OEF for assistance and relate the answer to the list of general needs or problems. <p>TAKE A 15 MINUTE BREAK</p>	<p>Remember, the problem may be external to the organization or it may be internal; it may be a training problem or an organizational problem.</p> <p>It may be in order to explain that it is not negative to talk about obstacles or problems.</p> <p>Help group <u>clarify</u> what they mean by their responses.</p> <p>If they have different perceptions or opinions it is important for them to see and reflect on them too.</p> <p>If that need is not found anywhere on the lists, point it out and ask them what this means. In either case tell them you'll return to this point later.</p>	<p>(Worksheet 1) Handout with questions listed.</p>

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OBJECTIVE:

Time	Topic/Activity	Suggestions for Consultant's role	Resources/Materials
	<p>After the BREAK:</p> <ul style="list-style-type: none"> -Summarize what has been done up to this point in the workshop: *The organization's mission is... *Its goals are... *It's programs are... *It would like to develop in "X" direction. *It needs "X,Y, and Z" in order to get there. *It sees "X" as its greatest obstacle. *It has requested "X" assistance from WID/Tech 	<p>This type of feedback is very important to the group in order to keep sharpening their appreciation of their own needs in the context of their organization.</p>	
<p>85.</p>	<p>4. <u>ANALYSIS OF NEEDS</u></p> <ul style="list-style-type: none"> -Explain to the group that any request for assistance or need identified a difficulty in or a capacity for improving group performance or functioning. (Give examples. See next column.) Also explain that in order to get as close as possible to actually fulfilling their needs, a performance analysis needs to be made. -Pass out Worksheet 2 and ask them (either individually or in small groups) to fill them out. (Give them 15 to 20 minutes) 	<p>At this point it is important that their situation and needs thus far identified be looked at in terms of group <u>performance</u> or <u>functioning</u>. If the problems and needs identified are somehow outside their control, it is important to make this distinction.</p> <p>(Examples: A request for technical assistance in budgeting means that their budgets have been perceived to lack something or not to be functional. An expressed need for better management obviously means that there is a current problem in management procedures. Even purely <u>external</u> obstacles or problems that do not reflect poor group functioning <u>per se</u> may indicate something about the group's ability to cope with the obstacle.)</p>	<p>(Worksheet 2) Handout with questions.</p>

OBJECTIVE:

Time	Topic/Activity	Suggestions for Consultant's role	Resources/Materials
	<ul style="list-style-type: none"> -Go from group to group (or individuals) and make sure they understand the questions and help them with examples or questions. -Write questions on newsprint . -When the groups are finished with the worksheet, fill in the answers from the participants. Be concrete and specific. -After discussion, ask them to prioritize problems. -Summarize and point out how much more specific their definitions of needs and problems are at this point than when they had merely <u>identified</u> them. 	<p>Assist group to concretize and focus responses by describing them in terms of organization, (or staff or committee, etc.) functioning.</p>	
	<p>5. <u>DETERMINATION OF HOW GROUP-DEFINED NEEDS CAN BE MET</u></p> <ul style="list-style-type: none"> -List major problems needing improvement in the priority order as established by group in last exercise. -For each one, ask the group how the need might be most effectively met? <p>(At this point introduce Nominal Brainstorming and explain how it works. Try to get a range of ideas for meeting needs.)</p> <ul style="list-style-type: none"> -Go back over the list and place a "T" next to those that might be part of a training program and an "O" next to those requiring other types of actions. -Ask what can be done about the "Os", immediately and long-range and by whom. 		<p>(Worksheet 3) Optional as handout. You will cover the questions as a dialogue with the group. It probably is not necessary that they have them in their hand.</p> <p>Handout: Nominal Brainstorming</p>

OBJECTIVE:

Time	Topic/Activity	Suggestions for Consultant's role	Resources/Materials
	<p>-Finally ask the group to identify its request for training from WID/Tech in relation to the rest of the "Ts".</p> <p>*Is there correspondence? *Where does it come in order of priority? *Does not seem the most important training matter for the gorup?</p>	<p>Be sure they explore their request in relation to their analysis before asking for a decision. (That will come in the next step.) At this point let them make the connections.</p>	
	<p>6. <u>CLARIFICATION OF THE CONSULTANCY</u></p> <p>-Ask the group how they now view theri original request.</p> <p>*Is it appropriate? *Is it the most indicated by the analysis? *Would they rather do something else? *Would they like to <u>add</u> something to the training requested? * What plans have been made for the training? Are logistics in place? How much flexibility is there?</p> <p>-Once these qurstions have been answered, a <u>decision</u> should be (have been) made regarding the objectives of the consultancy:</p> <p style="padding-left: 40px;">--TYPE AND SCOPE OF THE TRAINING --OTHER ASSISTANCE THE CONSULTANT WILL PROVIDE</p> <p>-Clarify any other logistical or planning matter regarding the 2(3) week consultancy.</p> <p>-Summarize by reflecting back to the group your understanding of agreements and explain how you will</p>	<p>If they are on target, congratulate them and yourself and move on to the next pahse!</p> <p>Use only the appropriate questions.</p>	

ORGANIZATIONAL NEEDS ASSESSMENT WORKSHOP (1st DAY OF CONSULTANCY)

1. List the problems/ needs/obstacles mentioned earlier. Are there any others that occur to you now?

2. Who identifies them as a problem/need/obstacle? (The people involved, outside observers, yourself, etc.?) Be specific for each problem

3. What have you observed within the organization in relation to the problem/ need/obstacle? (e.g. Need: Financial resources. Observations: 1) We don't know how to write proposals. 2) We don't know to whom to write? 3) We don't have a strategy etc.)

4. Where/how can we get more information for diagnosis?

RULES FOR BRAINSTORMING USING NOMINAL GROUPS

(Adapted from Tubbs, 1978)

INDIVIDUALLY: Make a private list of brainstormed items. Write quickly for 2-3 minutes using guidelines 1-3 below.

1. *Put judgment and evaluation temporarily aside.*
 - a. Acquire a "Try Anything" attitude.
 - b. No fault finding is allowed. It stifles ideas, halts association.
 - c. Today's criticism may kill future ideas.
 - d. All ideas are at least thought starters.
2. *Turn imagination loose and start offering the results.*
 - a. The wilder the ideas the better.
 - b. Ideas are easier to tame down than to think up.
 - c. Free wheeling is encouraged; ideas can be brought down to earth later.
 - d. A wild idea may be the only way to bring out another really good one.
3. *Think of as many ideas as you can.*
 - a. Quantity breeds quality.
 - b. The more ideas to choose from, the more chances of a good one.
 - c. There is always more than one good solution to any problem.
 - d. Try many different approaches.

IN A GROUP: In round-robin fashion take one item from each person and write it on chart paper--even those which are duplicates. (An alternative would be to have them brainstorm on ditto masters and then reproduce them, but the "group memory" approach keeps people better focused on the task.)

4. *Record all ideas in full view (see Doyle and Strauss, 1972).*
5. *Seek combination and improvement.*
 - a. Your ideas don't all have to be original.
 - b. Improve on the ideas of others.
 - c. Combine previously mentioned ideas.
 - d. Take advantage of group association.
6. *Evaluate at a later session.*
 - a. Approach each idea with a positive attitude.
 - b. Give each idea a fair trial.
 - c. Apply judgment gradually.

Doyle, Michael, and Straus, David. The New Interaction Method: How to Make Meetings Work (Chicago: Playboy Press, 1976; paperback, 1977).

Tubbs, Stewart. A Systems Approach to Small Group Interaction (Reading, Mass.: Addison-Wesley Publishing Company, 1978).

WIDTECH TRAINING MANUAL (Draft)

**Topic: PROPOSAL WRITING
and Fund Raising**

**Project Director: Rana Harmon
Materials Developer: Gail von Hahmann**

**OVERSEAS EDUCATION FUND
2101 L Street, N.W.
Washington, D.C. 20037**

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WIDTech Training Manual: Proposal Writing and Fund Raising

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PROPOSAL WRITING

Overall Workshop Objectives: By the end of this workshop participants will:

- 1) understand how proposal writing fits into planning; 2) be aware that proposal writing is one method of fund raising; 3) have practiced writing, submitting and critiquing a proposal; 4) know what skills are needed for proposal writing and have assessed their ability with those skills.

SESSION I: INTRODUCTION

- Objectives: 1) Introductions of group members and facilitator; 2) Review of agenda for workshop; 3) Pre-training assessment by participants; 4) Look at how proposal writing relates to planning and project design.

TIME	TOPIC/ACTIVITY	SUGGESTIONS TO FACILITATOR	MATERIALS	PROCESS/MODE
	<p><u>Introductions</u></p> <ol style="list-style-type: none"> 1. Introduce group as in-depth as necessary, i.e., if they don't know each other, use dyads who get to know each other for a few minutes and introduce each other to the group. Facilitator can take part in this. 2. Go over Workshop Objectives; see if group needs clarification on anything. 3. Review objectives for this session. <p><u>Personal Learning Goals</u></p> <ol style="list-style-type: none"> 1. Ask participants to complete "Personal Learning Goals" Handout. Ask them to please make two copies so that you and they may each keep a copy for later reference. <p><u>Proposal Writing as Part of Planning, i.e., Project Design</u></p> <ol style="list-style-type: none"> 1. Ask group to think of ideas for projects they have wanted to initiate. List them on the board and have group select one 	<p>Have objectives written on board or newsprint, or on handouts for participants if you like.</p> <p>In addition to assisting in evaluating the Workshop, this exercise gets participants to begin to be specific about objectives and indicators or criteria for measuring how objectives are met.</p> <p>Work with individuals if they have trouble being specific.</p> <p>Explain we will refer to these at the end of each Session for a "progress evaluation."</p>	<p>Handout I Carbon paper</p> <p>Chalk, Board</p>	<p>Whole group or dyads.</p> <p>Whole group</p> <p>Individual work</p> <p>Whole Group</p>

TIME	TOPIC/ACTIVITY	SUGGESTIONS TO FACILITATOR	MATERIALS	PROCESS/MODE
	<p>for which they will write a proposal during this Workshop.</p> <p>2. <u>Analyzing a Project Idea</u> -- Give each participant a copy of Worksheet A and as a group, complete the categories as best you can using the project just selected.</p> <p>It is expected the group will have difficulty being very specific about the project (depending on the state of the project chosen) -</p> <ul style="list-style-type: none"> - ask group if this seemed difficult - what things do they need to know to procede? (Get a few brief responses.) <p>3. <u>Creating a Project Design</u> -- Divide the group into pairs (or not more than three to a group) and ask them to do a rough project design using the guide categories in Worksheet B.</p> <p>Ask participants to look through the Worksheet carefully and ask questions for clarification.</p> <p>Instruct them to get accurate facts & figures when possible, and to make</p>	<p>Try to ascertain ahead of time if the organization has a list of potential projects.</p> <p>The project selected should be "real" in that some research has already been done as to its need and feasibility.</p> <p>If group is not prepared to do this, use the Sample Project provided with this Manual.</p> <p>If Sample Project is used, have group read <u>individually ahead of time</u> and then fill in Worksheet based on that info.</p> <p>Small groups should have whole afternoon and/or overnight to work on this. They should have access to facilitator during part of that time.</p> <p><u>If Sample Project is used</u>, not as much time will be needed since participants will be identifying material for the categories rather than creating it.</p>	<p>Worksheet A ; Sample Project (Description only), if used. <i>See Panama Report in Suppl. materials Section</i></p> <p>Worksheet B; Sample Project (minus LogFrame) if used.</p>	<p>Whole Group</p> <p>Small Groups</p>

SESSION I, Continued....

TIME	TOPIC/ACTIVITY	SUGGESTIONS TO FACILITATOR	MATERIALS	PROCESS/MODE
	<p>careful estimates or "guestimates" when not possible!</p> <p>Explain that the point is not to be 100% accurate but to understand what is involved in project design.</p> <p>4. Bring group back together. Ask what were major difficulties. Give suggestions as to how to meet those difficulties under "normal" circumstances.</p> <p>5. Create <u>one</u> project design based on the work the separate groups have done, using Worksheet B Categories.</p> <p>Have each participant copy down final project design on a second set of Worksheet B.</p> <p>6. Ask members of group to summarize what they have experienced so far. Ask them to look at Personal Learning Goals and check anything they have learned or add items that weren't there.</p> <p><u>Summary of First Session/Lecturette</u> →</p> <p>See suggested Lecture Content</p> <p><u>Assignment for Next Session</u></p> <p>Ask participants to read Handout II on RESEARCHING FUNDING AGENCIES.</p>	<p>Encourage compromise and a <u>simple</u> design here. This may be difficult since small groups defined the problem separately.</p> <p>If too difficult, facilitator should chose the problem that seems most appropriate and procede to design.</p> <p>Be sure to be aware of frustrations and encourage participants to express them. Indicate you know that this exercise was difficult because of short time and few resources, but we'll refer to it again later.</p> <p>ALSO: Encourage people to share their Personal Learning Goals and begin to list skills they mention, on paper to be kept and so all can see.</p> <p>NOTE: Only if you are following exactly the sequence of these SESSIONS.</p>	<p>Board</p> <p>New blank copies of Worksheet B.</p> <p>Personal Learning Goals</p> <p>Newsprint</p>	<p>Whole Group</p> <p>Whole Group</p> <p>Whole Group</p> <p>Whole Group</p>

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SESSION II: FUND RAISING

Objectives: By the end of this Session participants will:

- 1) know how to research funding sources and have gained practice in doing so
- 2) know how to plan a strategy for selecting an appropriate funding source
- 3) have practiced contacting a funding source

TIME	TOPIC/ACTIVITY	SUGGESTIONS TO FACILITATOR	MATERIALS	PROCESS/MODE
	<p><u>What About the Business of Fund Raising?</u></p> <p>1. Hand out the Reading on Fund Raising (Handout II) and ask each participant to read and think about it for a minute.</p> <p>Lead a discussion on the reading. Begin with general questions- e.g.,</p> <ul style="list-style-type: none"> - Is this an accurate picture? - Why or why not? - How might this relate to your organization? <p>Then, perhaps, become more specific:</p> <ul style="list-style-type: none"> - What problems does fund raising present for you personally, your organization? - How might you deal with these problems? <p>(List on Newsprint or Board for later in this session.)</p> <p><u>Identifying Funding Sources</u></p> <p>1. Refer to the reading assigned.</p>	<p>NOTE: The purpose of this discussion is not to harangue about unfair distribution of wealth, but to encourage participants to be <u>realistic</u> about the funding process and its place in the world system. Discussion should lead to ideas (creative, positive) about dealing with the situation.</p> <p>NOTE: If facilitator believes this to be very sensitive, try it out on someone ^{local} ahead of time.</p>	<p>Handout II</p> <p>Newsprint or Board</p>	<p>Whole Group</p>

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SESSION II: FUND RAISING, Continued....

TIME	TOPIC/ACTIVITY	SUGGESTIONS TO FACILITATOR	MATERIALS	PROCESS/MODE
	<p style="text-align: right;">international</p> <p>Ask group to brainstorm list of/donor agencies that have local offices in this city/country. (Government, foundation, multi-national corp. etc:) Ask for local funding sources.</p> <p>List on the board or on newsprint.</p> <p>Ask participants to select those donors which might be most likely to fund the project planned in Session I (or the Sample Project provided).</p> <p>Make a list of these.</p> <p><u>Strategy for Selecting Donors</u></p> <ol style="list-style-type: none"> 1. Ask participants to consider the list of potential donors and then to look at Handout III, as well as referring back to the Reading. <p>After allowing for some "thinking time" ask:</p> <ul style="list-style-type: none"> - Do you have enough information about these potential donors to know whether we should apply to them? - What more information should you have? Make list for all to see AND ask them to make their own lists. - How can you get this information? (i.e., which ones can be telephoned, which visted, which written to?) <ol style="list-style-type: none"> 2. Ask participants to divide into groups of two and select one(or two) agencies 	<p>If organization already has such a list, refer to it.</p>	<p>Handout III</p> <p>Board or Newsprint</p>	<p>Whole Group</p>

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SESSION II: FUND RAISING, Continued....

TIME	TOPIC/ACTIVITY	SUGGESTIONS TO FACILITATOR	MATERIALS	PROCESS/MODE
	<p>which they will be responsible for contacting and reporting back to the group (during Session IV). Try to cover as many agencies as possible, even those not in the smaller list made above.</p> <p>Explain that we will talk about and practice how they should make these contacts before they do so.</p> <p><u>3. Contacting the Funding Agency</u></p> <p>Initial Phone Call (Role-Play)</p> <p>Have each group of two go through the role-play in front of the whole group, if possible.</p> <p>If group is too large, divide in half and have pairs play to half the group.</p> <p>Process the Role-Play:</p> <ul style="list-style-type: none"> - How did participants feel? - What is "appropriate" behavior and how can uncomfortable situations be salvaged? - What <u>skills</u> are involved? (Add to list you are keeping from Personal Learning Goals) <p><u>4. Assignment for Contacting Donors</u></p> <p>Explain that each pair will be expected to make contact with at least one agency before Session IV is over and will be expected to report on that</p>	<p>The purpose of this exercise is twofold: to give participants practice in contacting donors; AND to provide the organization with a file of potential donors.</p> <p>Make this clear to group.</p> <p>Be sure to explain the nature of a role-play and encourage participants to "get into" their roles. Some need more coaching than others.</p> <p>Encourage participants to "ad-lib" within the roleplay structure and to make the situation as <u>real</u> as possible.</p> <p>Processing should include a "venting time" first, if any of the role-plays became tense.</p>	<p>Role Play Instructions</p> <p>May need a second room if group is larger than 10.</p>	<p>Groups of two and Whole Group</p>

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TIME	TOPIC/ACTIVITY	SUGGESTIONS TO FACILITATOR	MATERIALS	PROCESS/MODE
	<p>..... contact during Session IV.</p> <p>Review methods of contacting:</p> <ul style="list-style-type: none"> - telephone - visit - letter (distribute copies of sample letter) <p>§ Each participant should have copies of the Sample Interview Questions for use in their contacts.</p> <p>§ Remind participants how significant these contacts can be and that an actual funding opportunity may result.</p> <p>§ Ask if they have any questions.</p> <p>5. <u>Evaluation of this Session</u></p> <p>Ask group to refer to Learning Goals and discuss what's been learned and what has yet to be learned. Emphasize skills learned -</p> <p>6. Assign reading for next Session: PROGRAM PLANNING & PROPOSAL WRITING Handout IV</p>	<p>Make sure organization doesn't mind some telephone expense (in country)</p> <p>Perhaps a short trip can be reimbursed by the organization if deemed important enough.</p> <p>NOTE: If your training site is much too far from any donor agency to call or visit, then ask each pair to write letters to the organizations listed - divide them up evenly among the pairs.</p> <p><u>Examples of skills:</u></p> <ul style="list-style-type: none"> Research Planning Writing Estimating (budget) Communicating 	<p>Sample Letter</p> <p>Sample Interview Questions (Handout III)</p> <p>Personal Learning Goals; Newsprint listing skills identified earlier.</p> <p>Handout IV</p>	

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SESSION III: WRITING THE PROPOSAL

Objectives: By the end of this Session participants will:

- 1) be familiar with the proposal-writing process
- 2) have written an actual proposal
- 3) be aware of skills required and their proficiency with those skills

TIME	TOPIC/ACTIVITY	SUGGESTIONS TO FACILITATOR	MATERIALS	PROCESS/MODE
	<p><u>Actually Writing the Proposal</u></p> <ol style="list-style-type: none"> 1. Divide participants into groups of four and have them choose roles: <ul style="list-style-type: none"> - 2 researchers - 1 writer - 1 editor <p>Assign each group a section (or sections, some are small) of the proposal to be written.</p> 2. Go over sections briefly with whole group, referring to reading assignment. List sections on board: <ul style="list-style-type: none"> Title Page Summary (written last) Introduction/Organizational Profile Problem Statement/Need Purpose and Objectives Methods/Program or Project Plan/Design Evaluation Budget/Financial Management Future Funding Project Documentation Optional: Log Frame <p>Explain that groups should base their</p> 	<p>Alternatives depending on group size:</p> <p>5 or less: have each person choose which section(s) he/she would like; concentrate on big sections, do smaller ones as group when larger ones have been written.</p> <p>5 - 12: work in groups of two and assign sections, covering as many as possible (assign if participants are hesitant to choose)</p> <p>12 or more: groups of three or four, as described.</p> <p><i>You may just want to describe and show from sample proposal.</i></p>	<p>Worksheet B</p>	<p>Whole Group</p>

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SESSION III: WRITING THE PROPOSAL, Continued....

TIME	TOPIC/ACTIVITY	SUGGESTIONS TO FACILITATOR	MATERIALS	PROCESS/MODE
	<p>writing on the Final Copy of Worksheet B from Session I.</p> <p>Also they should consult with other groups since their work needs to be as integrated as possible.</p> <p><u>IMPORTANT:</u> Use an actual proposal guideline from one of the organizations they have research, if possible.</p> <p>Otherwise depend on the materials provided here.</p> <p><u>IMPORTANT:</u> Explain that normally, one or two people would complete the writing of the proposal to give it an overall smooth style. (If the proposal is actually to be submitted, this will have to be done.) FOR NOW, the purpose is for each participant to have practice with writing part of a proposal.</p> <p>Explain how much time they have to do the task, where you will be for consultation, and when they should come together again, with their sections completed (with copies, if possible). <u>IMPORTANT:</u> Stress final work</p> <p>Provide them with Handouts V - VII for reference as they write; giving each to the appropriate group.</p> <p>§ Ask for questions....</p>	<p><u>Explain TASKS:</u></p> <p>Researchers - provide data, write drafts if Writer needs them Writer - responsible for overall writing of section Editor - reads over and makes suggestions for clarity</p> <p>should be complete and neat, though probably not typed. IF AT ALL POSSIBLE - it would be good to have each group turn their portion into a typist who might then have copies ready for the next Session. This would be ideal.</p>	<p>Worksheet B Handouts v - VII .</p> <p>NOTE: OEF's <u>Programmers Tool Kit</u> has good section's on Documentation in "How to Develop A Proposal" section.</p>	<p>Small groups</p>

SESSION IV: REVIEWING AND SUBMITTING THE PROPOSAL

Objectives: By the end of this Session participants will:

- 1) understand the importance of reviewing the proposal before submitting to the donor
- 2) have practiced reviewing a proposal
- 3) be familiar with sample criteria of funding agencies
- 4) be aware of need for follow-up action after submission to donor

TIME	TOPIC/ACTIVITY	SUGGESTIONS TO FACILITATOR	MATERIALS	PROCESS/MODE
	<p><u>Reviewing the Proposal</u></p> <p>1. Bring groups back together and have all participants read over the final product.</p> <p>Thank everyone for their hard work, explain that we understand this is not a "finished product" (unless, of course, it is!!!).</p> <p>2. Explain that we will now simulate a situation where we have asked some outside reviewers (either people from our own organization or from another organization) to help us review our work before submitting it to the donor.</p> <p>Ask a few members to volunteer to be Reviewers.</p> <p>Ask two people to volunteer as Discussion Leader and Recorder.</p> <p>Proceed with the Group Review of Proposals Exercise.</p> <p>You may want to give an introductory talk based on "Reviewing and Editing</p>	<p>If it has not been possible to type and duplicate it, clip all sections together and pass around to the group, asking them to skim.</p> <p>Explain instructions; participants don't need copies. Explain MORE THAN ONCE, ask if it's clear..</p> <p><i>If actual guidelines from a donor were used, refer to these as well.</i></p> <p>It may be possible to get someone else from the organization not involved in the training to join in. Be sure she/he is low-key and sensitive to all the work that has gone on.</p>	<p>Group Review of Proposals Exercise</p> <p>Checklist for Reviewing Proposals</p> <p>Reviewing & Editing Proposals</p>	<p>Whole Group</p>

TIME	TOPIC/ACTIVITY	SUGGESTIONS TO FACILITATOR	MATERIALS	PROCESS/MODE
	<p>Proposals" or give it to the group to read.</p> <p>TAKE A BREAK.- Reviewers will need time (1 hour?) to use the Checklist.</p> <p>§ Ask recorder to write reviewer's suggestions on board.</p> <p>3. Use Discussion Questions on last page of Checklist to summarize this session. Refer to Personal Learning Goals, if appropriate.</p> <p>4. Have groups report on the research they have been doing on funding agencies.</p> <p><u>Submitting the Proposal</u></p> <p>1. Ask if any got information on procedures for submitting the proposal.</p> <p>If not, outline usual procedure: - by deadline. - certain number of copies (many!)</p> <p><u>Follow-Up Action</u></p> <p>1. Have participants read over HANDOUT VIII; discuss any past experiences they may have had; discuss what changes they may need to make in the proposal just prepared before actual submission.</p>	<p>NOTE: You might want to organize this so that Reviewers are selected while proposal is being written then have them review it before the group comes back together after writing the proposal.</p> <p>All participants should get copies of "Checklist for Reviewing Proposals" after this Session.</p> <p>Advise them to keep this material in a notebook for their organizations future funding needs, and to keep it up to date.</p> <p><i>You may also want to refer to the SAMPLE FUNDING AGENCY CRITERIA found in Supplementary Materials Section.</i></p>	<p>Board, or newsprint.</p> <p>Discussion Questions on "Checklist for Reviewing Proposals";</p> <p>Personal Learning Goals</p> <p>Handout VIII, "Proposal Follow-Up"</p>	<p>Reviewers meet separately.</p> <p>Whole Group</p>

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TIME	TOPIC/ACTIVITY	SUGGESTIONS TO FACILITATOR	MATERIALS	PROCESS/MODE
	<p><u>Summary of the Workshop</u></p> <ol style="list-style-type: none"> 1. Use this time to tie up any "incompletes" e.g., reports from those who contacted donor agencies and are just getting responses. 2. Ask members of group to summarize each Session, using handouts, etc. to refresh people's memories. <p><u>Evaluation</u></p> <ol style="list-style-type: none"> 1. Ask participants to refer to their Personal Learning Goals. <p>Ask: - Did you add anything to number 2? If so, what?</p> <ul style="list-style-type: none"> - What indicators did you use to measure your progress? - In what areas did you progress? What areas need more practice? 2. Ask them to share "additional comments" if any. 3. Refer to skills list and summarize skills practiced. 4. Add any other evaluation questions you, as facilitator, need or want. 	<p>You may want to ask certain members (or ask for volunteers) to prepare for this ahead of time.</p> <p>Encourage participants to share these with the group.</p> <p>If you want a specific record you may want to ask them to write it down for you.</p>	<p>Personal Learning Goals Skills List (from other Sessions)</p>	

Proposal Writing

HANDOUT I

PERSONAL LEARNING GOALS

1. Have you ever written a project plan or proposal? If so, what parts were most difficult?

If not, have you ever written , in school, a theme paper, research paper or thesis? What parts were most difficult?

2. What do you think you need to know in order to write a proposal?

3. What indicators (or measurement criteria) will tell you that you do know these things by the end of the Workshop?

4. Additional Comments (to be added throughout the Workshop).

WORKSHEET

Analyzing a Project Idea

CATEGORY	YOUR PROJECT
Broad Subject area: (is your project related to health, rural development, nutrition, etc.)	
Type of Grant: (are you looking for special project funds, seed money, operating expenses, matching grants, etc.)	
Beneficiaries: (will your project benefit/involve rural women, urban women, housewives, young girls, etc.)	
Project Location (will the project take place in the community, in a training centre, in different sites)	
Project Duration (will your project have a specific starting and ending date, approximately how long)	
Specific Subject Area of Activity: (for example: a newsletter for rural women; a conference on legal rights of women, etc.)	
Summary: (briefly state the information above as if you were talking to a funding agency representative).	

Adapted from: Information Kit for Women in Africa, African Training & Research Centre for Women (UNECA) and International women's Tribune Centre , p.A-10.

WORKSHEET B, p.1

DEFINING THE PROBLEM

1. What is the Broad Subject Area (from Worksheet A) of your Project?
2. Why did you choose this project?
3. What evidence have you seen that there is a problem?
4. What other people or organizations agree that this is a problem? What evidence indicates their agreement?
5. What do the Beneficiaries (from Worksheet A) think about this?

How do you know what they think?

If you don't know what they think, how can you find out?

6. Assuming for now that the Beneficiaries and many other people and organizations agree with you, write a sentence that clearly and simply states what the problem is:

WORKSHEET B, p. 2

SETTING PROJECT OBJECTIVES and CRITERIA FOR EVALUATION

On Worksheet B, p.1, you have defined the problem you hope to begin to solve. That definition tells you "where you are now."

Now you need to imagine "where you will be" at the end of the project. To do that you need to write these three types of objectives:

- Development objective (long-term; also referred to as Overall Purpose or Goal)
- Immediate objectives (primary; also called simply Objectives, usually more than one, these can be viewed as the steps to take to accomplish the Development Objective)
- Sub-Objective (secondary; these are the criteria which will tell you that each Immediate Objective has been met).

Please see the attached page for examples of each.

1. Now, in as much detail as possible in the limited time you have, write a Development Objective for your project and as many Immediate and Sub-Objectives as necessary to give a clear description of what you hope to accomplish.

WORKSHEET B, p.3

METHODS or APPROACHES

In this section you need to decide what methods and overall strategy will be the best to accomplish the objectives you have just set.

1. Take each Immediate Objective and accompanying Sub-Objective and decide the best way to accomplish them.
2. Think about how each Immediate Objective will be linked to the others in the overall project design (for example, will you do each objective separately, will some overlap others?).
3. Use the Categories on Worksheet A to help you complete this picture of your project. This can be an overall description of how you hope to accomplish the objectives;(the Workplan which you will do later, will put these Methods or Approaches in chronological order.)

WORKSHEET B, p.4

DEVELOPING A WORKPLAN

For each Immediate Objective, develop a Workplan, using the attached form (make additional forms as you need them). When you are done, the combination of each separate workplan will be your Overall Workplan.

Try to illustrate the Overall Workplan on the attached "Time Bar."
List the Objective at the left and use an arrow or bar to indicate how long the task is expected to take. Later during the implementation of the project, this Time Bar can be made more specific, listing each sub-objective as well.

IMMEDIATE
OBJECTIVE _____

SUB-OBJECTIVE _____

ACTIVITY _____

TASKS:

WHO RESPONSIBLE?

BY WHEN?

TASKS:	WHO RESPONSIBLE?	BY WHEN?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

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WORKSHEET B, p. 4, continued

TIME BAR

Immediate Objective	1	2	3	4	5	6	7	8	9	10	11	12

WORKSHEET B, p. 5

STAFF, MATERIALS and FACILITIES

Use this form to indicate the resources you will need to accomplish the project. You can also indicate on this form resources needed for the project that your organization can provide without outside assistance.

Resources Required	Approx. Cost	Where to Be Obtained
STAFF		
EQUIPMENT/MATERIALS		
FACILITIES		
OTHER		



WORKSHEET B, p. 6

BUDGET

Take each Approximate Cost from the previous page and indicate whether money will come from your Organization's funds (Contributed or In-Kind) or from outside funds (Total Requested).

Budget Categories	Amount Contributed	Amount Requested	Total
<u>STAFF</u>			
<u>EQUIPMENT/MATERIALS</u>			
<u>FACILITIES</u>			
<u>POSTAGE/TELEPHONE</u>			
OTHER			

TOTALS

SUGGESTED LECTURE CONTENT

It helps to think about PROPOSAL WRITING at two levels: first, as part of an organization's system, and secondly, as part of an overall socio-economic system.

A. AS PART OF AN ORGANIZATION'S "SYSTEM"

§ Proposal Writing is definitely a part of an organization's planning process.

However, it is important for certain steps to precede actual proposal writing:

- a clear statement and understanding among members of the goals of the organization
- a clear statement and understanding among members of the general project objectives

§ Proposal Writing is often thought of as part of a Project Strategy - that is, once the project has been thought through and a draft of the project design written (this is sometimes called an IDEA PAPER), then it is time to think about putting the project into proposal form.

NOTE: If facilitator has used WIDTech "Planning Workshop" you may want to note that Proposal Writing "fits in" between Sessions 10 and 11 in the planning process (i.e., between "Defining the Objective" and "Developing a Strategy").

§ This procedure for working up to proposal writing is the ideal. All too frequently, organization's find themselves taking "reactive" instead of "pro-active" action. E.g. donor's may announce Operational Program Grants (OPG's) to be available now. Organizations in need of funds then respond to those OPG's even though their own goals may not fit the goals of the funding agency.

B. AS PART OF THE SOCIO-ECONOMIC SYSTEM

How does it happen that organization's are often found to be "reacting" to funding agencies, and how can it be avoided?

First of all, funding agencies - national governments, United Nations, foundations, and Private Voluntary Organizations (PVO's) usually have program content guidelines determining how their money must be spent; they also have annual deadlines for when their money must be spent. And because they have the money and you don't and because there are many organizations competing for their funds, the donor agencies do tend to control the funding process.

In addition, some donor agencies have as a priority (after their own survival) the equitable re-distribution of world resources. Other donor agencies must (by their

SUGGESTED LECTURE CONTENT, Continued....

very nature) be concerned with national political priorities, ideological concerns, or single-issue programs.

How can an organization seeking funds best proceed?

Nothing is guaranteed, but these may help:

- Again, be clear about your organization's overall GOALS.
- When preparing the organization's overall budget, think carefully about your financial future - 5 and 10 years from now. Then decide what kind of funding and projects are wise to embark upon now: e.g., 1, 3, or 5-year projects; projects which will generate their own income?
- Try to be sure that one or more staff members have fund raising or "development" as their full-time task and that they give^t and receive support from each division of your organization.
- All project directors and the fund raiser should be aware of local/ donor agencies and other sources of funds in your country and MEET WITH THEM ON A REGULAR BASIS. Even if you don't have a concrete idea for a project, be aware of what agencies are about to give funds for. Perhaps you may be able to get them interested in finding funds for your ideas!

§ Samples of OPG outlines and Idea Paper description are included in ^{Supplementary} Materials section of this manual.

4. Selecting a source of assistance:

As mentioned in Section C, it is best to first look for sources of assistance in your own country or community. Two possibilities are:

I. GOVERNMENT SERVICES: Government or local authority staff, such as community development officers, school teachers, health and social workers, etc., can give valuable advice as to suitable government contacts, available resources, existing and future projects, etc.

APPLY to the government department most likely to be dealing with the subject of your request, e.g., education, rural development, etc. Address the letter or application to the Women's Programme Officer if there is one. As the work of the various interested departments frequently overlaps, it may be necessary to send copies of your letter to all concerned departments. This should help to ensure that the right people hear about your request.

SEND a copy of your letter to the overall government bureau for promoting women's interests, if such a group exists.

KEEP interested government service people in your area informed of your plans and programme activities. In this way, you can often get additional help and support.

II. LOCAL COMMUNITY SERVICES AND BUSINESSES: When looking for smaller amounts of money (say, under \$2,000), facilities, equipment or technical assistance, it might be possible to generate support from

community service organisations or local businesses. Organisations such as the Rotary, Jaycees or Apex clubs will sometimes organise campaigns for various projects.

If neither your government nor local sources seem sufficient, you should then begin exploring outside sources, such as those listed in the section on "Possible Funding Sources." These sources have been arranged in 4 major categories:

- 1) United Nations
- 2) Government Agencies
- 3) Private Agencies and
and Foundations
- 4) Multinational Corporations

These sources assist non-governmental projects in a variety of ways. The brief description, accompanying each listing, is intended to provide you with information that will help you determine whether the particular organisation merits further exploration. However, extensive research into potential funding agency's priorities and procedures for applying is crucial, so once you have identified several sources, letters briefly describing your project and requesting information regarding their guidelines, women and development focus and application procedure should be sent out. The information you collect will help you...

5. Plan a proposal strategy:

Seeking outside funding or assistance requires organisation, persistence and creativity. Some ideas to consider are:

I. Funding agencies will appreciate your doing the necessary homework before submitting a formal application. This means finding out about their priorities and required proposal format. If a local representative is available, make contact to discuss required procedures. If not, write requesting the necessary information. (.See p. A-10 for Sample Letter to a Funding Agency.)

II. Start a "Funding File" on notecards or a notebook, with a different page or card for each prospective funder. Keep updated information on your talks with them or on research done, so that you can continually refer back to it during the application phase.

III. Many assisting organisations will want to see evidence of:
(a) the degree of local initiative; (b) the utilisation of available resources within the country; (c) plans for the project to eventually become self-sufficient; (d) potential of the project to be repeated or adapted in other areas of the country. Once you have received information regarding the criteria of various likely sources, you might want to start a notebook, with a section for each of these criteria, and keep documentation that your organisation can satisfy the requirements. For example, if "degree of local initiative" is required, you might want to include questionnaires, newspaper articles, etc.

IV. A positive decision from a funding agency is very dependent upon your ability to establish good working relationships with its representatives or field staff. For this reason, it is imperative that you phone or visit, when possible, or, at the least, write. Even if your first submission receives a negative response, remember that you have at least established contact. Keep the government, United Nations foundation or PVO representative informed of your progress, problems and any new ideas...and, when you have a project that seems to fall within their guidelines, try again.

READING ON FUND RAISING

Such imbalances (between rich and poor countries in the world and between rich and poor people within countries) are reflected in both the need for fundraisers and the tensions they face.

Many citizen groups who are trying to change the plight of the poor and powerless find themselves turning to funding sources that are controlled by the wealthy. This is often seen as a form of redistributing the wealth. Citizen groups need to ask whether or not the relation to wealth of the powerless really does change as a result of this kind of funding.

In a sense, fund-raising perpetuates the status quo. Centers of economic power remain in tact and the poor remain poor. Other people see raising money from the wealthy as co-optation -- although some short term needs are satisfied through such donations, the group is unable to move toward more substantive changes. Still others see this type of funding as purely benevolent -- a pluralistic approach ("everyone working together") to solve society's problems.

Adapted from: THE RICH GET RICHER AND THE POOR WRITE PROPOSALS, Nancy Mitiguy, Citizen Involvement Training Program, University of Massachusetts, p. 5.

Exercise:

Initial Phone Call to a Funding Sources (Role-Play)

The Process:

1. Review your list of possible funding sources and decide which type you'll concentrate on first (government, corporate, foundation, church, or other).
2. Pair off and decide which person is the fundraiser and which is the potential donor. During the role-play, the fundraiser should use details from an actual project.
3. Both "grantor" and "applicant" should look over the suggested questions and responses and select those which are appropriate for the situation, adding other as needed.
4. The "applicant" calls the "funding source." This can be done by placing two chairs back-to-back, or by actually placing a telephone call.
5. In pairs, discuss how the phone call went. The "grantor" should be prepared to make suggestions about improving the presentation.
6. Switch roles, if desired, and repeat the steps above.
7. If more than one pair is doing the activity, end the role-play with a discussion of specific problems that each pair had and suggestions about what strategies worked.

One of the best ways to prepare for the first contact with a funding source is to practice. This activity focuses on the phone calling process since that is the usual route for applications for federal, large corporate and national foundation funding.

ADAPTED FROM: THE RICH GET RICHER AND THE POOR WRITE PROPOSALS, Nancy Mitiguy, Citizen Involvement Training Program, University of Massachusetts, pp. 40-41.

Possible Questions and Responses for the Role-Play

Fundraiser: Possible Questions	Corporate Funding Source: Possible Responses	Foundation Funding Source: Possible Responses
<ul style="list-style-type: none"> • May I talk with the person who's responsible for (<i>corporate gifts, XYZ federal assistance program, foundation funding, etc.</i>)? • What is the application process? • What are the proposal deadlines? • Do you have any information you could send me? • Do you have specific proposal requirements (length, content, forms)? • When will funding decisions be made? • To whom should the proposal be submitted? • Would you like me to send you a two or three page letter describing the project or a longer proposal? • I'd like to schedule an appointment to talk with you about our programs. When would that be convenient? 	<ul style="list-style-type: none"> • I'm sorry, we don't give grants to community groups. • I'm sorry, we can only consider proposals from groups working in ABC Community. • Let me connect you with Paula Public Relations. • I'm sorry, all our community funds are committed for this year. • I'll send you some information about the application process. • Send in your proposal and I'll get back to you in a few months. 	<ul style="list-style-type: none"> • The trustees have not scheduled their next meeting. • <i>(If a national foundation):</i> Send in a brief letter describing the project. If it is consistent with our funding priorities, you will be requested to submit a full proposal. • <i>(If a small foundation):</i> We cannot meet with applicants because it takes too much time. Funding decisions are based on written proposals. • <i>(If a large foundation):</i> We would be happy to meet with you once your proposal has been reviewed. • We don't supply application forms. Send us a 10 - 15 page proposal. <i>(Note: This usually the case with a small foundation; most national foundations don't have application forms, but proposals are generally longer.)</i> • <i>(If a small foundation):</i> Our funds are non-discretionary, which means that they are paid to the same organizations every year. • We have no funds left to distribute until next year.
	<p>Government Funding Source: Possible Responses</p>	
	<ul style="list-style-type: none"> • What is the CFDA (Catalog of Federal Domestic Assistance) number of the program you're calling about? • I'll send you a packet of information, including an application form. • Funds haven't yet been appropriated for this program. • I'll be happy to meet with you. When are you coming to Washington? • What specific questions do you have about the program? 	

NAME _____

TITLE _____

ORGANISATION _____

ADDRESS _____

COUNTRY _____

DATE _____

Dear _____:

It is my understanding that the (name of funding agency) administers funds (or provides technical assistance) for (project category, i.e., training projects, seminars, etc.) in the field of (subject area, i.e., income-generating activities, family planning, etc.) for women. I am writing on behalf of (name of organisation), an organisation active in the field of (state area of activity). We are planning to undertake a project to (provide a brief description of the objectives of the prospective project, adding a short sentence or two that highlights the unique features of the project).

If this project is one which could be considered for funding by (name of funding agency), would you please send me the necessary forms and any other relevant information required for submitting a proposal?

If you think that this project is inappropriate for funds from your office, could you please refer me to a more appropriate source?

Thank you for your cooperation and assistance.

Sincerely,

NAME _____

Adapted from Mary Hall, Developing Skills in Proposal Writing, Second Edition. Portland, Oregon, Continuing Publications, 1977, p. 60.

PROPOSAL WRITING

HANDOUT III

THINGS TO THINK ABOUT BEFORE CONTACTING DONORS

Total Amount of Request:

- Small projects of \$1,000 or less might look for local private donations, loans from credit unions, cooperatives, revolving loan funds, or agencies known for providing small grants.
- Projects in the range of \$1,000 - \$10,000 might approach local women's or other non-governmental organizations.
- Large projects of over \$10,000 (large especially for the local level) might find the local government a likely source.
- Still larger projects of \$25,000 and more, might look for multiple sources locally, but most probably will need to go outside the community -- national, regional or international.

Procedures for Some Agencies:

- Requests to the United Nations and its specialized agencies must generally go through the national government - this is also true for requests to other national government(s) agencies - in these cases, contact should also be made with the appropriate local representative of the country and/or UN agency. These local contacts can help identify monies available through their agencies, assist in proposal formulation, and in moving it through the system more efficiently and effectively.

SAMPLE INTERVIEW QUESTIONS:

- What categories or areas of development does this agency fund (e.g., agriculture, education, training, housing, institution building, integrated rural development, etc.)?
- Do you have different levels of project funding and what are some examples (e.g., small, medium and large grants)?
- May we have a copy of your policies and procedures? Guidelines for proposals? Application forms? Deadline schedules?
- We have a project in mind dealing with _____; are you the proper person with whom to discuss this area. If not, could you direct us to that person?
- If your agency is interested, what steps would you recommend we follow from here?
- Other questions of your own: (Use back for making notes.)

PROGRAM PLANNING & PROPOSAL WRITING

By Norton J. Kiritz
Executive Director
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Proposals written for foundations and those written for federal grants will differ markedly in final form. Foundations usually require a brief letter; federal agencies usually require you to complete an extensive array of forms and possibly attach your own narrative.

We suggest the following format as a basic planning format for all proposals. Thinking through the various sections as we suggest will enable you to draw from the content virtually all that either a private or public funding source will ask from you. Thinking through the various components will also enable you to develop a logical way to approach your plans and programs. And hopefully this planning will make your programs more effective.

The proposal format looks like this:

- Proposal Summary**
- I Introduction**
- II Problem Statement or Assessment of Need**
- III Program Objectives**
- IV Methods**
- V Evaluation**
- VI Future Funding**
- VII Budget**

Proposal Summary

The summary is a very important part of a proposal — not just something you jot down as an afterthought. There may be a box for a summary on the first page of a federal grant application form. In writing to a foundation, the summary may be presented as a cover letter, or the first paragraph of a letter-type proposal. The summary is probably the first thing that a funding source will read. It should be clear, concise and specific. It should describe who you are, the scope of your project, and the projected cost.

Some funding sources may screen proposals as a first step in grant-making. That is, they briefly examine each proposal to see if it is consistent with their priorities, if it is from an agency eligible to apply for their funds, etc. As a further step, the "screeners" may draw up a summary of their own and these proposal summaries may be all that is reviewed in the next step of the process. It is much better to spend the time to draw up a summary of your own that the funding source can use than to hope that the reviewer sees the importance of your program in his brief initial look at your proposal. So do a good job!

The Grantsmanship Center, a nonprofit, tax-exempt educational institution, is a response to the critical need of nonprofit and public agencies for low-cost training in program planning and resource development. The Center conducts workshops, employs a research staff, maintains a library and publishes a magazine.

I Introduction

This is the section of a proposal where you tell who you are. Many proposals tell little or nothing about the applicant organization and speak only about the project or program to be conducted. More often than not proposals are funded on the basis of the reputation or "connections" of the applicant organization or its key personnel rather than on the basis of the program's content alone. The Introduction is the section in which you build your credibility as an organization which should be supported.

Credibility

What gives an organization credibility in the eyes of a funding source? Well, first of all, it depends on the funding source. A traditional rather conservative funding source will be more responsive to persons of prominence on your Board of Directors, how long you have been in existence, how many other funding sources have been supporting you, and other similar characteristics of your organization. An "avant garde" funding source might be more interested in a Board of community persons rather than of prominent citizens and in organizations that are new rather than established, etc.

Potential funding sources should be selected because of their possible interest in your type of organization or your type of program. You can use the introduction to reinforce the connection you see between your interests and those of the funding source.

What are some of the things you can say about your organization in an introductory section?

- How you got started.
- How long you have been around.
- Anything unique about the way you got started, or the fact that you were the first thus-and-so organization in the country, etc.
- Some of your most significant accomplishments as an organization or, if you are a new organization, some of the significant accomplishments of your Board or staff in their previous roles.
- Your organizational goals — why you were started.
- What support you have received from other organizations and prominent individuals (accompanied by some letters of endorsement which can be in an appendix).

We strongly suggest that you start a "credibility file" which you can use as a basis for the introductory section of future proposals you write. In this file you can keep copies of newspaper articles about your organization, letters of support you receive from other agencies and from your clients. Include statements made by key figures in your field or in the political arena that endorse your kind of program even if they do not mention your agency.

For example, by including a presidential commission's statement that the type of program which you are proposing has the most potential of solving the problems with which you deal, you can borrow credibility from those who made the statement (if they have any).

Remember, the credibility you establish in your introduction may be more important than the rest of your proposal. Build it! But here, as in all of your proposal, be as brief and specific as you can. Avoid jargon and keep it simple.

II Problem Statement or Assessment of Need

In the introduction you have told who you are. From the introduction we should now know your areas of interest — the field in which you are working. Now you will zero in on the specific problem or problems that you want to solve through the program you are proposing.

Pitfalls

There are some common pitfalls which agencies face when they try to define problems.

Sometimes an organization will paint a broad picture of all the ills plaguing people in a part of the community. Proposal writers do not narrow down to a specific problem or problems that are solvable, and they leave the funding source feeling that it will take a hundred times the requested budget even to begin to deal with the problems identified. This is overkill. It often comes from the conviction of the applicant that it must draw a picture of a needy community in all its dimensions in order to convince the funding source that there are really problems there. All that this does is to leave the funding source asking: "How can this agency possibly hope to deal with all of those problems?" Don't overkill.

Narrow down your definition of the problem you want to deal with to something you can hope to accomplish within a reasonable amount of time and with reasonable additional resources.

Document the Problem

Document the problem. How do you know that a problem really exists? Don't just assume that "everybody knows this is a problem. . . ." That may be true, but it doesn't give a funding source any assurance about your capabilities if you fail to demonstrate your knowledge of the problem. You should use some key statistics here. Don't fill your proposal with tables, charts and graphs. They will probably turn off the reader. If you must use extensive statistics, save them for an appendix, but pull out the key figures for your problem statement. And know what the statistics say.

To summarize, you need to do the following:

- Make a logical connection between your organization's background and the problems and needs with which you propose to work.
- Support the existence of the problem by evidence. Statistics, as mentioned above, are but one type of support. You may also get advice from groups in your community concerned about the problem, from prospective clients, and from other organizations working in your community and professionals in the field.
- Define clearly the problems with which you intend to work. Make sure that what you want to do is workable — that it can be done within a reasonable time, by you, and with a reasonable amount of money.

III Program Objectives

One of your concerns throughout your proposal should be to develop a logical flow from one section to another. Whereas you can use your introduction to set the context for your problem statement, you can likewise use the problem statement to prepare the funding source for your objectives.

An objective is a specific measurable outcome of your program.

Clearly, if you have defined a problem, then your objectives should offer some relief of the problem. If the problem which you identify is a high incidence of drug abuse by youth in your community (substantiated, of course), then an objective of your program should be the reduction of the incidence of drug abuse among youth in your community. If the problem is unemployment, then an objective is the reduction of unemployment.

Distinguish between Methods and Objectives

One common problem in many proposals is a failure to distinguish between means and ends — a failure to distinguish between methods and objectives.

For example, many proposals read like this:

"The purpose of this proposal is to establish a literacy class for women in the rural region of this country."

"The objective of this program is to provide health care services for young mothers in the city."

What's wrong with these objectives? They don't speak about outcome! If I support your project for a year, or for two years, and come back at that time and say, "I want to see what you have done—what you have accomplished," what can you tell me? The fact that you have established a service, or conducted some activities, doesn't tell me whether you have helped to solve the problem which you defined. I want to know what you have accomplished. I want to know the outcome of your activities. I want to know whether you have, through your tutoring program, reduced the number of drop-outs with whom you have worked, or whether the delinquent youth with whom you worked got into less trouble over the past year. Knowing that you worked at it is not enough!

Some organizations, trying to be as specific as they can, pick a number out of the air as their measurable objective. For example, an agency might say that their objective is to "decrease unemployment among adults in the XYZ community by 10 percent." The question I ask is: where did they get that figure? Usually it is made up because it sounds good. It sounds like a real achievement. But it should be made of something more substantial than that. Perhaps no program has ever achieved that high a percentage. Perhaps similar programs have resulted in a range of achievement of from 2 to 6 percent decrease in unemployment. In that case, 5 percent would be very good, and 6 percent would be as good as ever has been done. Ten percent is just plain unrealistic. And it leads me to expect that you don't really know the field very well.

If you are having difficulty in defining your objectives, try projecting your agency a year or two into the future. What differences would you hope to see between then and now? What changes would have occurred? These changed dimensions may be the objectives of your program.

In addition, I want to examine your objectives in a little more detail. Maybe some programs create jobs for people that are very temporary in nature, and they reduce the unemployment problem in the short term, but after a year or two the problem will be back with us as bad, or worse, than ever. This gets into the question of evaluation, which clearly relates to the setting of measurable objectives. For a good set of well-drawn and realistic objectives becomes a set of criteria for the evaluation of the program and thus serves another purpose.

IV Methods

By now you have told me who you are, the problem(s) you want to work with, and your objectives (which promise a solution to or reduction of the problems), and now you are going to tell me how you will bring about these results. You will describe the **methods you will use — the activities you will conduct to accomplish your objectives.**

Research

The informed reviewer wants to know why you have selected these methods. Why do you think they will work? This requires you to know a good deal about other programs of a similar nature. Who is working on the problem in your community and elsewhere? What methods have been tried in the past and are being tried now and with what results? In other words, can you substantiate your choice of methods? •••

One planning technique which you might want to use is this. Take a sheet of paper and divide it into columns. The first column is the "problem" column, the second is headed "objectives," the third "methods" and the fourth "evaluation." If you list all your objectives separately in the second column, you can then identify the problem that it relates to, the specific methods in your program that deal with the objective, and the criteria of success in reaching the objective as well as the method of evaluation.

This helps you to see whether you are truly dealing with all of the problems you talked about, whether your objectives relate to the problem(s), whether you have a method of reaching each objective, and whether you have set up an evaluation mechanism to deal with your entire program. This leads us into the next proposal component — evaluation.

V Evaluation

Evaluation of your program can serve two purposes for your organization. Your program can be evaluated in order to determine how effective it is in reaching the objectives you have established — in solving the problems you are dealing with. This concept of evaluation is geared towards the results of your program.

Evaluation can also be used as a tool to provide information necessary to make appropriate changes and adjustments in your program as it proceeds.

As we have stated, measurable objectives set the stage for an effective evaluation. If you have difficulty in determining what criteria to use in evaluating your program, better take another look at your objectives. They probably aren't very specific.

Subjective and Objective Evaluations

Also, be sure you understand the difference between subjective and objective evaluations.

Subjective evaluations of programs are rarely evaluations at all. They may tell you about how people feel about a program but seldom deal with the concrete results of a program. For example, we saw an example of an evaluation of an educational program that surveyed opinions about program success held by students, parents, teachers and administrators of the program. This is a pretty "soft" evaluation, and doesn't really give much evidence to support the tangible results of such a program.

In addition, this particular evaluation solicited comments from students when they completed the program, failing to deal with over 50 percent of the students who started but did not complete the program. Clearly, those students who finished the program are going to react differently as a group, from those who didn't complete the program. And we might, as an agency, learn a great deal from those who didn't finish. From the nature of this evaluation, one might suppose that the educational institution involved was committed to producing what they thought would look like a good evaluation, but it wouldn't pass muster with a critical reviewer.

Subjectivity — introducing our own biases into an evaluation — will often come in when we evaluate our own programs. Particularly if we feel that continued funding depends on producing what looks like a good evaluation.

One way of obtaining a more objective evaluation, and sometimes a more professionally prepared evaluation, is to look to an outside organization to conduct an evaluation for you. You might go to other non-profit agencies, colleges and universities in your community which will work with you in developing an evaluation for your program. Sometimes it is possible to get an outside organization to develop an evaluation design and proposal for evaluation that can be submitted to a funding source complete with its own budget, along with your proposal. This not only can guarantee a more objective evaluation, but can also add to the credibility of your total application, since you have borrowed the credibility of the evaluating institution.

It is essential to build your evaluation into your proposal and to be prepared to implement your evaluation at the same time that you start your program, or before. If you want to determine change along some dimension, then you have got to show where your clients have come from. It is very difficult to start an evaluation at or near the conclusion of a program, for you usually don't know the characteristics of the people you are working with as they existed prior to being in your program. . . .

VI Future Funding

This is the last section of your proposal, but by no means the least important. Increasingly, funding sources want to know how you will continue your program when their grant runs out. This is irrelevant for one-time only grant applications such as requests for vehicles, equipment, etc. But if you are requesting program money, if you are adding to your projects through this proposal, then how will you keep it going next year?

A promise to continue looking for alternate sources of support is not sufficient. You must present a plan that will assure the funding source, to the greatest extent possible, that you will be able to maintain this new program after their grant has been completed. They don't want to adopt you — they don't want you continually on their back for additional funds. Moreover, if you are having problems keeping your current operations supported, you will probably have much more difficulty in maintaining a level of operation which includes additional programs. The funding source may be doing you no favor by supporting a new project and putting you in the position of having to raise even more money next year than you do now.

What is a good method to guarantee continued support for a project? One good way is to get a local institution or governmental agency to agree to continue to support your program, should it demonstrate the desired results. But get such a commitment in writing. A plan to generate funds through the project itself — such as fees for services that will build up over a year or two, subscriptions to publications, etc.—is an excellent plan. The best plan for future funding is the plan that does not require outside grant support.

Sample Proposal Format

With the background work now behind you, it is time to begin drafting your proposal. REMEMBER: each UN, government or private organisation may have a different proposal format. Nevertheless, the following suggested format will be suitable to a number of organisations and easily adaptable to the requirements of others.

<u>Section:</u>	<u>Description:</u>
TITLE PAGE	This page can serve as both the title page and the cover sheet for your proposal. It should have the following information: (1) Title of project; (2) Name of person applying for funding; (3) Name of organisation sponsoring proposal; (4) Location and duration of project.
SUMMARY or ABSTRACT	Although this section follows the title page, it is frequently the last task in writing the proposal. The summary should be a concise description of the proposed project, not exceeding more than one page. It should briefly state the problem/need, the objectives, methodology or programme plan, the duration and the amount of money requested.
PROBLEM/NEED	Outline the specific problem or need your project seeks to address. When possible, document your statement with statistics or quotes.
OBJECTIVES	Provide a very specific description of the outcome of the project. They should be written in terms of your end results, not the methods you will use to achieve them. Be certain they relate to the statement in your PROBLEM/NEED section.
ORGANISATION PROFILE	Briefly describe the history and function of your organisation. Again, the experiences you describe should relate back to the PROBLEM/NEED and OBJECTIVES, substantiating your abilities to undertake a project of this nature.

Section

Description

PROGRAMME or
PROJECT PLAN

Location: Where will this project take place? Why was this particular site chosen? What facilities and equipment are available?

Personnel: State the number of people required and their function in carrying out the project's agenda. It is suggested that biographies or vitae of key individuals involved in the project be included in the appendices to the proposal.

Work Plan: This most important section will take some time to develop. You will want to describe the sequence of the activities you are planning, as well as specific methodologies and approaches. The importance of developing a specific and realistic work plan is very important, and it can be used as a guide once the project is operational. (A helpful tool in designing and explaining the work plan is to do a Time Bar. This can be included in the appendix to the proposal. See the Sample Time Bar at the end of this section)

EVALUATION

You will want to discuss this component of the proposal with the prospective funding agency since reporting and evaluation requirements vary widely. Evaluating your project while it is underway will help you and your funding people see your progress and accomplishments, as well as the choices available for future action.

BUDGET

The budget should be a realistic estimate of all costs involved in implementing and operating the project. For ongoing projects, try to include a projected budget for the next several years, demonstrating, if possible, eventual self-support.

Cost estimates should be broken down into logical categories, such as: personnel salaries; supplies and equipment; rent; telephone; postage, etc.

Section:

Description:

BUDGET (cont'd)

Voluntary contributions made to the project by you and members of your organisation should be listed and estimated as closely as possible in cash terms, or shown as "no charge."

If you are applying for funds for a special project of an established organisation, be sure to include funds for overhead. For example, if you are operating a day care centre, but want to run a special training programme for one week, you should include a fraction of the rent, electricity, etc., that will be used from the day care centre during that time period.

ADDITIONAL HINTS FOR WRITING YOUR PROPOSAL:

--Avoid professional jargon. Emphasize the practical ways your project will work to reach people and meet their needs.

--Hand your draft proposal around for comments and suggestions. View the proposal critically and be prepared to do rewriting and rethinking.

--Consult other reference materials. At the end of this chapter, there is a listing of other books and articles that provide advice on writing and researching proposals. Use as many as possible.

HANDOUT VI

SIMPLE GUIDELINES FOR EVALUATING PROJECTS AND
DEVELOPMENT PROGRAMS

FROM: PROGRAMMER'S TOOL KIT, Overseas Education Fund

HANDOUT VII

THE PROPOSAL WRITER'S BUDGET GUIDE

FROM: PROGRAMMER'S TOOL KIT, Overseas Education Fund

Reviewing and Editing Proposals

*"My Lord!
Can that thing be right?"*



Drawings by Olden; Copyright 1968
The New Yorker Magazine, Inc.

Deadlines come up too fast; you keep adding to the proposal, and what happens? There's no time left to review and edit the proposal, so it gets shoved into an envelope and delivered or mailed. But a thorough review of what's been written serves several functions:

- It helps eliminate unnecessary or redundant information.
- It allows a quality check. Is there a logical flow from section to section? Are words defined, typographical errors corrected, etc.?
- It serves as a completeness test. Does the proposal state clearly what the program and organization are trying to accomplish? Are the necessary appendices attached?
- It allows the time for the policy-making board to give its final approval and familiarize itself with the contents of the entire proposal.

There are several ways to review proposals. One is for the fundraiser to do it alone or invite comments from

members and staff. Another is to present them to the policy-making board; still another is to involve a group of "outsiders" in the review process.

The next activity focuses on the latter, because although it is used less frequently than the other methods it offers the chance for some feedback that wouldn't come from those within the organization.

Group review can turn up some unexpected information. I once sat in on a review process where each reviewer was asked to summarize the ideas in the proposal. Five very different perceptions of the proposal were expressed, so it was apparent that the proposal was not a clear presentation of the program. Discussion then followed on how to eliminate the confusion in the proposal; each reviewer suggested changes that needed to be made. In another review group, major questions were raised about the budget. Discussion focused on how to change the budget format to be more clear about what was being requested from the funding source.

Exercise: Group Review of Proposals

The main advantage of inviting comments from an outside group of reviewers is to pinpoint areas that are confusing to people who aren't familiar with the organization. Reviewers need not be "professional"; anyone who's had some fund-raising experience can comment on what makes sense in the proposal and what doesn't. A group of reviewers can be composed of the following:

- *fundraisers from other nonprofit organizations;*
- *people who have received funding from the funding source to whom you're applying;*
- *people who know nothing about your organization;*
- *anyone with good writing skills.*

Once you've completed a proposal and want some reaction to it prior to sending it to the funding source, select five reviewers. Give each one a copy of your proposal and any guidelines published by the funding source. A checklist for reviewing proposals is included in this activity as an additional guide for reviewers.

The Process:

1. Select a discussion leader.
2. Establish "rules" for giving constructive criticism as needed. Example: Reviewers may be asked to offer positive comments *before* critical ones. Or reviewers may want to "de-personalize" their comments by saying, "What is meant by _____?" rather than, "What do *you* mean by _____?"
3. Ask the proposal-writer to identify specific things (s)he would like feedback on (style, grammar, sequence, format, program design, budget).
4. Pass out the Checklist for Reviewing Proposals and allow 10-15 minutes for people to read it. The proposal-writer can emphasize specific questions on the checklist (s)he would like reviewers to concentrate on.
5. Hand out copies of the proposal. Allow enough time for reviewers to read the entire proposal. Another option is to mail both the checklist and the proposal to reviewers *prior* to the meeting.
6. Ask each person to give their overall impression of the proposal (5 minutes per person).
7. Taking each section of the proposal separately, ask for the reviewers' comments, allowing at least 10 minutes per person. You may also want to ask each person to summarize what's been said in each section. The discussion leader should note differences in the summaries and concentrate on those differences.
8. The discussion leader can record "suggestions for improving the proposal" during the discussion. This list can be used to summarize the meeting, and suggestions that all reviewers agree with can be highlighted.



Drawing by Brenda Yellock

Possible Follow-up:

"Support networks" for fundraisers are becoming increasingly common. One role for such a network is reviewing proposals that members of the network have already written. The review process in this activity can be used each time a member of the network completes a proposal.

Checklist for Reviewing Proposals

The questions in this checklist are ones that many reviewers ask as they read through proposals. You may want to use this as a guide to review someone else's proposal or to help you write and edit a proposal of your own. The questions correspond to the format suggested in Program Planning and Proposal Writing and should be adapted when it's appropriate for different funding sources. This list is by no means comprehensive, since each funding source has its own criteria for evaluating proposals. Space is provided for you to make additions to the list.

Proposal Summary

- What is being requested from the funding source?
- Is the applicant organization adequately described (purpose, location, size, qualifications)?
- What are the major components of the proposed program?
- Does the summary "stand by itself," describing briefly the applicant organization and proposed program?
- Does the summary interest you enough to make you want to read more?
- Other questions:

- Do you have a clear picture of the organization?
 - What is the size and composition of its membership, volunteers, staff and board of directors?
 - What geographic area is the group working in and what are the characteristics of the people the group is working with?
 - What is the size of the annual budget?
 - What is the structure of the organization?

- Does the organization attempt to conduct some projects that generate some income?
- What kind of in-kind contributions does the group receive and from whom?
- Do leaders in the community appear to support the work of this group?
- What kind of recognition has the organization received (media coverage, endorsements, etc.)?

- Does the organization appear to be capable of handling the amount of money being requested?
 - How does this amount compare with previous funding?
 - What other funding sources have contributed to this particular program?

- Is there something "special" about this organization; something that makes it different from other groups?
- Can you summarize the primary strengths of the organization?
- What are the capabilities of the staff and volunteers?

Proposal Introduction

- Is the history of the organization adequately described (origins, purpose, major successes and accomplishments)?
- Who has funded the group in the past?

- Has this organization received any support from members, clients and/or the local community?

- Are the staff's qualifications sufficient to carry out the program as described or will

additional staff be needed?

Other questions:

Other questions:

have happened as a result of the project?

Other questions:

Problem or Need Statement

Objectives

Method Or Activities

- What is the nature of the problem described in the proposal?
- What are the underlying causes of the problem?
- How does the organization document the nature and extent of the problem? What kind of data is used?
- How significant is this problem compared with others in that community, region, or state?
- What have other attempts to solve the problem accomplished/not accomplished?
- Does this program duplicate similar activities of other organizations?
- Overall, does the organization appear to have a good grasp of what the problem is?
- Who has recognized this as a serious need (Presidential or gubernatorial commission, experts in the field, legislatures, research and planning institutions)?
- Are there words or terms that need definition?

- Do the objectives relate to the problem statement described in the previous section?
- How specific and measurable are the objectives?
- Do the objectives say what the organization hopes to accomplish (e.g. "Our objective is to train maroon elephants to count from one to 10.") or do they show how this program will affect program participants (e.g. "Eighty percent of the maroon elephants in Our-city will be able to count from one to 10 upon command.")?
- Do the objectives sound realistic or does it sound like mountains will have to be moved?
- Are the objectives expressed in terms of *outcomes*, naming specific things that will

- Do the activities relate to the problem statement and objectives?
- Is there a timetable or work plan that explains the scope and sequence of the activities?
- Is there any "fuzziness;" does the project seem to be developed sufficiently?
- Does the applicant explain why this approach was chosen over other possible approaches?
- How does the applicant propose to coordinate its activities with other agencies?
- Has the organization had experience running this kind of program? If not, what specific resources or skills will be needed to run an effective program? Does the organization have access to these skills or resources?
- How does this program relate to others that the organization is running? (Is it top priority, second, third, etc.?)
- How were the ideas and details for this project developed? By whom?

Other questions:

Other questions:

What are the projected sources of income for the project?

Other questions:

Evaluation

How will the organization know when it has succeeded, failed or done a mediocre job?

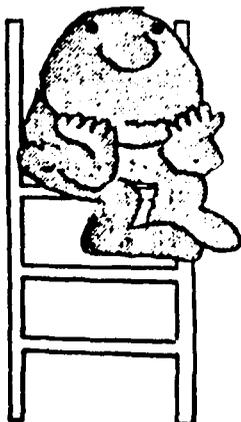
What specific "milestones" will help measure the progress of the program?

Who is responsible for doing the evaluation? How much will it cost?

How will the data collected for the evaluation be used?
 • What specific decisions will the evaluation results help make?

What will be evaluated and how?

Who will see the final results of the evaluation?



Future Funding

What are the organization's plans for obtaining funding next year? the year after? in five years?

What percentage of future budgets will be derived from members, participants, fees or community support?

Other questions:

Budget

Is there a budget for the proposed programs *and* one for the entire organization?

Does the format of the budget make sense?

Are the costs too high or low?

Are there too many or too few staff positions for the proposed program?

How do the costs of this program compare with those of similar programs?

Are *all* the costs for the program included in the budget?

Are there cost items that don't appear to be necessary to run the program?

Questions That Don't Usually Get Asked But Should Be

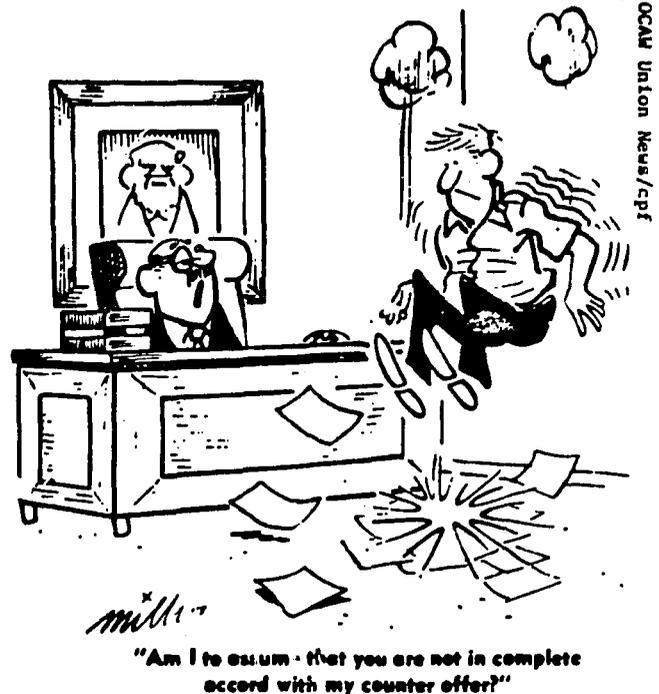
Will this program increase or decrease participants' dependency on this and other organizations? How?

What assumptions about people does the design of this program make (e.g. does it assume that people don't work because they're lazy, unskilled, or there aren't enough jobs)?

Discussion Questions:

- *What have you learned about proposal writing from these activities? from your own experiences?*
- *How can you share your perspective on proposal writing with others in your group?*
- *What kind of information, help, and support does a proposal-writer need from members of the organization?*
- *What are some things you can do to make sure there will be sufficient time to review a proposal before it has to be submitted?*

Proposal Follow-up



OCAW Union News/cptf

financial statement, for example)?"

Having breathed a sigh of relief and now thinking that the worst is over, it's tempting for fundraisers to send off a proposal, and wait. And wait. And wait.

This is called the passive approach. While it's reasonable to expect funding sources to acknowledge receiving proposals and to notify applicants of funding decisions, this doesn't always happen.

A quick phone call to the funding source a few weeks after submitting the proposal can relieve much of the waiting-in-the-dark frustration. A fear of being "pushy" prevents some fundraisers from doing this, but as long as you're not bugging the funding source every day, follow-up is advisable. Possible questions for the call are:

"Have you had a chance to read our proposal?"

"Do you have any questions about the proposal or budget?"

"When will you be able to talk with me about the proposal?"

"When do you expect to have made your final decision?"

"Are there specific points in the proposal that need clarification?"

"Do you need additional materials (last year's

Another aspect of the follow-up is *negotiation*, or at least the willingness to negotiate. This is why the fundraiser needs to have a clear notion of what compromises will be acceptable to the staff, board and members of the organization *prior to the follow-up contact*.

If, during the follow-up, it becomes apparent that the funding source is interested in the program but has reservations, push for clarification of the points in question. Any program changes that have been discussed on the telephone should always be summarized in a follow-up letter to the funding source. Before making any commitments to program changes, consider the questions below.

- *What changes are the funding source suggesting?*
- *What is the nature of the changes? How will they affect the proposed program?*
- *Have the group's staff/board/members had the opportunity to express their opinions about the proposed changes?*
- *What are the advantages and disadvantages of the changes?*
- *Are the changes acceptable to the group as a whole?*

SUPPLEMENTARY MATERIALS

IDEA PAPERS

The purpose of an Idea Paper is to provide a brief description of a potential project. This paper can serve as a point of discussion with the local counterpart organization, with AID or other funding source, with government persons and other interested people, and OEF headquarters.

An idea paper uses the same format as a full-blown proposal, but is its briefest version. For some foundations and corporations, the idea paper may be sufficient, and need not be expanded further. For larger donors, such as AID, it will be necessary to elaborate considerably on this paper.

There is no single format for an idea paper. Wherever the donor has indicated a proposal format, that outline should be followed in the idea paper stage also. The suggestion below is based on AID's Operational Program Grant (OPG) Proposal Outline.

Most of the suggestions are self-explanatory, but perhaps a few words are in order on the last section, "Budget". At every stage in the project negotiations, the budget seems to be the most difficult area to discuss, and too often it is the only topic of discussion.

During the early stages of preparing and presenting an idea paper, care should be taken that everyone knows the approximate cost of the project in rounded figures, for example, \$100,000, \$500,000 or \$1 million, for a given period of time. At this point, a detailed budget cannot be prepared for public presentation. But the OEF person should be projecting costs in as much detail as possible, so that when the final budget is drawn-up in Washington, those costs will be known, particularly for local staff, building construction, rents, etc.

The budget page is usually the last section of the idea paper, so that it can be easily detached when presenting the paper to a person who does not need the financial information. In most cases, only OEF and the donor need know the financial picture.

Idea Paper Outline : attached

DiCicco 29 December 1981

Idea Paper Outline

Project Summary Sheet (first page)

Project Title:
Project Location:
PVO Name and Location:
Central Headquarters:
Contact Person:
Date of Submission:
Total Request:

I. Project Description

- 1.1 Project Goal
- 1.2 Project Purposes
- 1.3 Project Outputs
- 1.4 Project Inputs
- 1.5 Targeted beneficiaries
- 1.6 End of Project Status

II. Project Background

- II.1 Counterpart organization capabilities, history
- II.2 OEF capabilities, history
- II.3 Communities, populations to be benefitted
- II.4 Host country activity in project and program areas, such as national or regional development plans
- II.5 Related projects, studies, or other documentation to support the project, including letters of support.

III. Implementation Plan

IV. Budget

DiCicco 29 December 1981

Operational Program Grant (OPG) Proposal Outline

Project Title: Total OPG Request:
Project Location:
IWO Name and Location:
Central Headquarters:
Contact Person:
Date of Submission to A.I.D:

I. Project Purpose and Description

- Describe project purpose and target group of beneficiaries
- General description of project
- Conditions expected at end of project
(above items should be identified through the use of the logical framework. See IV, C., below)

II. Project Background

- History of proposal development including: problems and development objectives addressed citing any relevant studies.
- Briefly describe your prior experience in project and related areas.
- Host country activity in project/program areas - past, present and proposed.

III. Project Analysis

- A. Statement of the economic effects of the project 1) on its major intended beneficiaries, 2) on related groups, and 3) the potential to reach large numbers of people at low per capita cost. Such effects could include such desirable purposes as increased income and employment; enhanced job opportunities through encouragement of labor intensive, low cost systems of production and services; improved literacy; and better forms of education and training to help people qualify for opportunities. In its review of the proposal, AID will be comparing the benefits of the project with the cost of the proposed effort. To the extent the IWO can apply information to assist the comparison, review of the proposal will be facilitated.
- B. Statement of the technology to be used and its appropriateness, and the ability of the implementing organization and beneficiaries to implement that technology. This would also include an examination of available appropriate manpower, other inputs, market opportunities, delivery facilities, and other possible project constraints, and methods to overcome them.
- C. Statement of pertinent socio-cultural factors and implementing agency environment. Describe and assess impact of project on socio-cultural traditions and values. Particular attention should be given to the role of women and the impact of the project on women. This section should

also address, as appropriate, the degree to which the project strengthens: host country or local capability in provision of services which help the poorest majority of people to experience better diets, better health and child care, more manageable family size, net employment and improved purchasing power; and contributes to increasing production, processing, nutritive value and distribution of food. Indicate whose interests will be harmed by the project and whether their opposition may be critical.

D. Statement of project relationship to other considerations in the Guidelines Governing Funding for Private and Voluntary Organizations in Connection with Development Assistance Under the Foreign Assistance Program:

- directness of project impact upon people who constitute the poorest majority and are often beyond the reach of public services.
- tie in, if any, with other programs which assure complementary efforts (or plans to do so).
- potential for project to spread to larger numbers of people over an extended period of time and how this should best come about.
- potential for wide scale application of the project based on domestic resources.

E. Presentation of a realistic plan showing that the proposed activity has a reasonable chance to be institutionalized with domestic resources. This should include training of local staff to assume all project responsibilities by the time donor support terminates. An important component to the institutionalization is the means by which financing will become available to make the activity independent of external donor financing, normally starting with substantial local support at the outset of the project to assure local interest and participation.

IV. Project Design and Implementation

A. Implementation Plan

- a description of how the project will be carried out, and whether or not sub-grants or contracts will be made.
- how the PVO plans to provide for technical assistance, i.e., through the use of volunteers, paid staff, and/or consultants, the use of commodities, etc.

- basic assumptions about the availability and PVO management of resources.
- proposed disbursement and procurement procedures, and related controls.
- a schedule of actions required, their timing and interrelationship, and the points of responsibility for carrying them out.

B. Measurement and Evaluation of Project Accomplishment

The proposal should contain a schedule of planned accomplishment, giving target dates, data as to conditions at start of project, and as expected at periodic intervals until project ends. This schedule of accomplishment is distinct from the schedule of implementation action above in that it enumerates the development changes to be achieved (using measurable indicators where possible) rather than the application of resources and effort.

In addition to internal evaluation by the PVO, AID expects to provide for external evaluation of accomplishments by contractor or AID staff, performed either independently or together with the PVO.

C. Logical Framework Matrix

The identification and interrelationship of the major factors in the project should be examined through use of a logical framework matrix. A sample of the AID matrix worksheet, used on all AID-financed projects, is attached. The matrix should be used and attached as part of the proposal. Information drawn from the matrix should be used in drawing up the proposal narrative, particularly for Section I. AID is prepared to train staff members of PVOs in the use of the logical framework (a substantial number of PVO staff members have already been trained), and to work closely with the PVO to prepare the logical framework during the development of the project proposal. The framework will help those involved both in the project design and the subsequent evaluation of the project.

V. Financial Plan

Budgets should be calculated by estimated cost per given period of time (year or half-year) for the entire life of the project itself, not only the costs of the organization undertaking the project. Costs are defined as accrued value of goods/services as they are procured (goods) or actually performed (services) or used up. This should not be confused with disbursements (payment of bills).

- A. The budget breakdown should accord with the following applicable components. All sources of funds, including A.I.D., should be shown separately and identified within each major cost component (i.e., 1, 2, 3, 4):

1. Personnel Costs (including Indirect Salary Costs and Benefits) in \$s and man months.
 - a. U. S. Technicians, etc.
 - b. Third Country Personnel
 - c. Local Personnel
 2. Training Costs (including Transportation & Subsistence) by \$s and man months.
 - a. Training in U. S.
 - b. Training in Third Countries
 - c. Local Training
 3. Commodity Costs
 - a. U. S. procured
 - b. Third Country procured
 - c. Locally procured
 4. Other Costs (Illustrative)
 - a. Cost of office and equipment rentals, etc.
 - b. Fuel
 - c. Transportation Costs
 - d. Other Support Costs
3. It is also strongly recommended that detailed budget breakdowns be available for negotiations by program activities, for example:
1. Building a clinic
 2. Training personnel
 3. Clinic operation
 4. Community extension

VI. Conditions

1. Evidence that the project's requirements for supportive resources other than that requested of AID will be available.
3. Explicit evidence of approval of the proposed project by the host country government, including information on the point of reference in the host government.

Best Available Document

SAMPLE

LOGICAL FRAMEWORK MATRIX

Summary	Objectively Verifiable Indicators	Important Assumptions
<p>General national development goal to which achievement of project purpose would contribute is the stabilisation of prices of agricultural products and improved farmer income.</p>		<p>Most country government policy will continue to be directed to this goal and regulatory and pricing policy provide incentives.</p>
<p>B.1. Purpose Increase the cash income in 4 rural provinces by reducing the cost of production 25% for cooperative members and increasing their net sales price by 20% in cash crop X.</p>	<p>B.2. End of Project Status (1)-Produce, process, and export crop X successfully by 1973. (2)-Co-op production and export of crop Y launched by cooperating-country personnel by 1975. (3)-Co-op members have cash income of \$100/member (vs. \$35 now). (4)-Total cost of crop X is \$ ton or less by 1975.</p>	<p>B.3. (as related to purpose) (1)-Co-op production is not displacing other production (2)-Export quotas for co-op.</p>
<p>C.1. Outputs (1)-Membership (2)-Volume (3)-Savings (4)-No. of co-ops (5)-Gross assets</p>	<p>C.2. Output Indicators -Number of co-ops chartered -Number of members joined -Amount of savings deposited -Amount in crops handled by co-op</p>	<p>C.3. (as related to outputs) Allocation of foreign exchange to buy machinery Credit available</p>
<p>D. 1. Inputs Contract Services 6 tech: 3-credit & savings 3-mktg Commodities: Vehicles for tech. Construction equipment</p>	<p>D.2. Budget/Schedule Budget and schedule of costs plan</p>	<p>D.3. (as related to inputs) Competent staff. specialists</p>

Sample Funding Agency Criteria

1. THE MAIN CRITERIA USED WHEN CONSIDERING PROJECTS:

- a) The objectives of the project should be clear and realistic and attainable within the limits of the resources and time available.
- b) The project should be well-defined as to cost, size and duration.
- c) In addition to a determination of the (Dutch) participation in the project, there should be, where appropriate, a plan for continuation of the project by the organisation or country concerned.
- d) The project should be managed by local people or come under local management as quickly as possible.
- e) Those responsible for the project should possess the necessary competence, qualifications and experience to ensure its sound management.
- f) The project should be adaptable in the country concerned.
- g) Local people should be involved in the planning, implementation and financing of the project.

2. SOME ASPECTS THAT ARE GIVEN PRIORITY:

The types of projects which will receive priority consideration by the (Dutch) co-financing programme include those which:

- support initiatives by local groups;
- foster self-reliance by encouraging local management, local financing and local initiative;
- grass-roots projects which need small investments;
- local community development activities aimed at promoting social justice and self-reliance, and directly linked to pre-existing activities. However, when the development process in a community has come to a deadlock, or when existing activities have too closed a character, preference should be given to entirely new activities.

3. LOW PRIORITY PROJECTS:

- recurrent expenditure of large institutions, e.g. hospitals and schools;
- ongoing administration expenses and running costs;
- projects for minority groups which place these groups in a privileged position and which may cause jealousy and competition.

FUNDING/TECHNICAL ASSISTANCE



4. EXAMPLES OF TYPES OF PROJECTS ELIGIBLE FOR SUPPORT UNDER THE CO-FINANCING PROGRAMME:

- a) Agriculture: farming, ranching, fertilizer/poultry-raising/fisheries cooperatives, rural credit development, cattle-dips, rain-water conservation, training and agricultural implements.
- b) Education: preferably technical and vocational education, adult education, leadership training.
- c) Health and Family Planning: integrated rural health care, child-care and nutrition programmes, mobile clinics, community nurses' training and mothercraft programmes.
- d) Human Resources Development: job-creating projects, projects that train people for employment, management development, e.g. cottage and handcraft industries development, marketing cooperatives, welding, plumbing and carpentry training.
- e) Social Action: projects that introduce change and innovation, e.g. the utilisation of mass media and other communications techniques, adult literacy programmes, youth projects, community centres, radio schools, audio-visual literacy programmes.
- f) Community Development: (overall community development programmes), projects with a combination of areas of concern for development of a village or region, e.g. health, nutrition and mothercraft programmes.

PROPOSAL WRITING

Adapted from: Mandate of the Dutch Co-Financing Programme, Interkerkelijke Coördinate Commissie Ontwikkelingsprojecten (ICCO), (Interchurch Co-ordinating Committee for Development Projects) 45 Stadhouderslaan, Utrecht, Netherlands.

FUNDING/TECHNICAL ASSISTANCE

PANAMA PROPOSAL

PROCEDURE FOR WIDTech SEED MONEY GRANTS

PROCEDURE FOR WIDTech SEED MONEY GRANTS

1. Project proposal submitted (Attachment 1).

A proposal should not be submitted until OEF and the applicant have discussed and generally agreed about the project being proposed.

2. Project proposal reviewed by OEF.

Approval is based upon the following:

- a) compatibility with the technical assistance provided, and with the preliminary idea proposed;
- b) fulfillment of OEF's criteria for seed-money grants (Attachment 2);
- c) quality of the proposal.

3. If the proposal is not accepted, OEF forwards comments to the applicant, and invites the organization to revise and resubmit the proposal.
4. If the proposal is approved, OEF sends the applicant a grant agreement for their signature (Attachment 3)
5. Grantee signs and returns grant agreement.
6. OEF signs and sends copy of the grant agreement to the grantee.
7. OEF disburses first half of the grant amount.
8. Grantee submits first-half progress report(s).

The number of reports to be submitted will depend upon the project's time frame. For projects of one year or more, quarterly reports will be submitted. For projects of less than one year, one report will be submitted at the end of each half, for a total of 2 reports. All reports will include both a narrative and financial account.

9. Assuming satisfactory progress has been made, OEF disburses remainder of grant.
10. Grantee submits second-half progress report(s).

The final report will include a summative evaluation for the project, and a budget showing the project's actual expenses and income (if applicable).

WIDTech SEED MONEY GRANT PROPOSAL OUTLINE

I. Summary Sheet

- Project Title
- Time Frame
- Project Site
- Name of Sponsoring Organization
- Address
- Representative of Grantee
- Date of Submission to OEF
- Amount Requested from OEF

II. Description of the Problem

III. Proposed Solution

- Project Purpose
- Goals
- Objectives

IV. Project Design

- Beneficiaries (how many, what kind)
- Project Site
- Methodology
- Staffing (number, qualifications, duties & responsibilities)
- Implementation Plan (timeline showing schedule of tasks)

V. Evaluation Plan

- Formative (the management feedback system)
- Summative (impact of the project upon intended beneficiaries)

VI. Project Documentation

- Progress Reports (what kind, how often)
- Other Materials Expected to be Produced

VII. Budget (in U.S. dollars)

- Expenses (request from OEF and local cash and in-kind contributions)
- Income, if applicable (sources and amounts)

VIII. Appendices

- Any Supporting Materials

CRITERIA FOR PROJECTS RECEIVING WIDTECH SEED-MONEY GRANTS

(GENERAL DEVELOPMENT CRITERIA)

- Are the intended beneficiaries low-income women in the Third World who have little or no access to other resources?
- Does the project increase women's options and attempt to raise their social and economic status?
- Did the idea for the project come from inside the community?
- Is the project part of a larger, integrated effort to achieve long-term change?
- Are project beneficiaries actively involved in the design, implementation, and evaluation of the project?
- Does the project promote income generation and community self-reliance?
- Does the project provide for transferring human development and technical skills to the beneficiaries?
- Does the project emphasize strengthening the capability of the community organization responsible for the project?
- Have all factors (social, cultural, economic, political) which could impede the project's success been addressed?
- Could the project result in unintended negative effects, such as the displacement of one group of people in order to benefit another? Have provisions been made to deal with such difficulties?
- Are technologies employed in the project appropriate to the locale?
- Are local goods and services, instead of imports, used to the greatest extent possible in the project?
- Will the community be able to contribute a portion of the resources (such as a building, equipment, materials, labor) required to implement the project?
- Have been clear and specific project goals and objectives been set? Is there a framework for measuring the benefits to be achieved by the project?

(SPECIAL OEF REQUIREMENTS)

- The organization has received OEF technical assistance within the last three years, or will receive OEF assistance within one year.
- Materials/activities provided for in the funding complement OEF's technical assistance training.
- A written project proposal is submitted, and includes a description of the community needs upon which the project is based.
- The procedure for submitting progress reports is in writing and is understood by the grantee.

WIDTECH SEED MONEY GRANT AGREEMENT

Project Title: _____

Description of Project: See attached Project Workplan. _____

Sponsoring Organization: _____

Address: _____

Representative of Grantee: _____

Amount of Grant from OEF: \$ _____

Contribution from Local Organization: \$ _____

Total Project Amount: \$ _____

Project Starting Date: _____

Project Completion Date: _____

Reporting Requirements: _____

Payment Procedure:

Disbursements will be made in two equal installments, after the first _____ progress report(s) has(have) been received. However, OEF reserves the right to terminate the grant before the second installment if satisfactory progress has not been achieved. Payment will be made in the form of _____

Signed: _____
(Representative of Grantee)

Date: _____

Signed: _____
(OEF Executive Director)

Date: _____

Areas for Questions:

1. How much money was expended on two activities funded by WID?
What did the activities consist of in the case of IAW?
2. What are the plans for using the Seed Money? Any developments on the possible "Matching" funds?
3. What has been done to evaluate these activities?

Meeting on Thursday, Aug 26, at 2:00 pm, on WIDTech Project Final Report Year 1, with OEF

To be attended by: Joan Goodin (new Deputy Director)
Rana Harmon, Project Director
Susan Roach (Rana's replacement)
Suzanne Kindervatter

OEF will present brief summation of Year 1 activities, then discuss their plans for second year activities.

The implementation plan for year 1 as included in the Grant:

1. Personnel selection
2. Information collection
3. TA for International Women's Organization
4. Seed Money Fund (to include possibility of a "matching" seed money fund to be explored during first year.
5. Evaluation

Costs: Personnel	\$31,720
Travel	17,750
Seed Money	10,000
Other Costs	9,400
Overhead	<u>23,760</u>
Total	\$92,630.

Final Report Includes:

Year 1 Accomplishments:

1. Info collected on international and indigenous women's organizations, their needs and available resources.
2. Tech assistance to women's organizations:
 - a. 20 requests for training/consultation from 17 countries. Nine became clients - 5 supported by USAID. (2 by WID grant)
 - (1) International Alliance of Women, October 18-28, 1981.
 - (2) North Solomons Women's Investment Corp. Arawa, Papua, New Guinea, June 10-23 1982
 - b. WID Tech Info Service - 100 requests for info.
 - c. Production of Training Package
Workshop "packages" developed for short-term TA in following areas: analyzing organizational needs; long and short-range planning, project identification and design; budgeting; proposal writing; workshop design; marketing research and management; women's economic development and family planning.
3. Seed Money Funds - None made^d from AID funds during year 1.