The project funded by the Polish-American Freedom Foundation within RITA programme
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Webinar 3. Preparation stages of a successful offer.

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Content

1. Format and criteria of an offer submission
2. Business Case, Project Scope and Requirements
3. Project stakeholders
4. Project schedule
5. Project budget

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Checking the format and criteria of an offer submission

Factors to take into account while you consider funding opportunities:

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Project scope and requirements

Call objectives and outcomes	• Results and types of activities expected from your project
Funding amount	• The minimum and maximum amount of funding available for a project
Funding rate	• Requirements for your own contribution to the costs of the projects, and related requirements for disbursements linked to certain financing milestones
Partnership or Consortium criteria	• Requirements regarding number of partners and number of countries allowed. It is also important to consider which countries can participate. In some cases, certain non-EU countries may also be eligible to participate in EU proposals
Duration	• Minimum and maximum duration
Single stage or two-stage	• Requirements regarding stages of Proposal submission
Duration	• Final dates when you need to have the proposal submitted

Important issues to consider initially

- **Read the CFP carefully**: Can you reference the key topics mentioned there in your proposal?
- Is the **budget appropriate** for your organization? does it match your and your partners' expectations and abilities to manage?
- Can you and your partner(s) **partially fund** and/or **advance money and resources?**
- Does your initial group of interested partners **fit the consortium criteria** (in terms of company size or national diversity for instance)? Do you lack some skills and if this is the case, can you find partners easily within the given time?
- Is the **time frame** adequate for you?
- Do you have **enough time to write your project proposal?** Build in an adequate buffer for partner discussions on tasks and budgets!

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Initiation phase

Once you have understood all the requirements of a funding opportunity, then you may initiate the project Initiation and/or design stage. During this phase the project idea is formed, and the project is developed.

- Establish project scope, SMART goals (specific, measurable, achievable, relevant, and time-bound) and deliverables are defined
- The budget is developed
- Broad statements are made about risks, approach, timelines
- Stakeholders are identified
- Project management scheme is decided
- Project proposal and project charter are compiled
- At end of phase, approved project charter is the approval to proceed to the planning phase

During the Planning phase the project implementation steps are clarified, and the plan of project implementation steps are clarified.

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Determine the problem and a way to solve it

- It is important to determine what issue the project is supposed to address.
- Relevance is an important aspect of successful projects.
- Relevance means that project has been designed based on a good understanding of the needs in the community
- This involves diagnosing the situation to focus the project on actual needs in the community.
- **A community assessment** can help identify such problem(s) and determine what the priority issues are that a project needs to address.

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Community assessment

- There are several methods of conducting a community assessment. Different methods are appropriate for different situations:
  - ✓ Focus Groups
  - ✓ Community Mapping
  - ✓ Stakeholder Analysis
  - ✓ Community Scales
  - ✓ Problem Tree
  - ✓ Survey Research
  - ✓ Strength, Weakness, Opportunities, and Threats (SWOT) Analysis

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Project problems and goals

- The next step is to select the problem or problems you wish to address with your project.
- Once any problems to be addressed have been identified, the community can design solutions to reduce or eliminate the identified problem.
- **The reduction or resolution of the problem or problems is the project goal**.
- The project goal should reflect positive changes in the set of conditions desired by the community after the problem is addressed.

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Methods for setting goals

The method of the SMART goals helps ensure that the goals have been thoroughly vetted. It also provides a way to clearly understand the implications of the goal-setting process.

S.M.A.R.T.

Specific – To set specific goals, answer the following questions: who, what, where, when, which, and why.

Measurable – Create criteria that you can use to measure the success of a goal.

Attainable – Identify the most important goals and what it will take to achieve them.

Realistic – You should be willing and able to work toward a particular goal.

Timely – Create a timeframe to achieve the goal.

Identify stakeholders

- The next fundamental of the project planning is to figure out who will be involved and who are the stakeholders of the project.
- Which functions or people might be affected by the project's activities or outcomes, who will contribute resources (people, space, time, tools, and money), and who will use and benefit from the project's output.
- In case of the projects of communities the stakeholders can be community members, government departments, state agencies, specific social groups and so on.
- The final step of a stakeholder analysis involves developing a strategy for how best to involve different stakeholders or groups in the project.

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Identify stakeholders

Stakeholders of the project can be divided into the following groups:

Stakeholders with high influence and high interest.	• They must be fully engaged.
Stakeholders with high interest but low influence.	• They must be informed of the project's progress and could be used for gaining interest from other groups to support the project.
Stakeholders with high influence but low interest.	• They should be kept informed and could potentially serve as high-profile patrons and supporters for the project.

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Create a project schedule

- The project work is organized around a work breakdown structure (WBS).
- **(WBS**) that divides the overall project goals into specific activities or tasks for each project area or component.
- WBS is supposed to reflect the total scope of work involved in the project.

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Work Breakdown Structure (WBS)

The work breakdown structure (WBS) defines:

- The division of work (**Work Packages and Tasks**)
- The division of type of action/activities (**Status**)
- The division of responsibilities between partner organisations and the project (**Leader**)

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WBS sample

No	Type of task	Leader	Description of task	Outputs deliverables
WP 1	**Main Task**			
1.1	Sub-task			
1.2	Sub-task			
1.3	Sub-task			
1.4	Sub-task			
1.5	Sub-task			
1.6	Sub-task			
WP 2	**Main Task**			
2.1	Sub-task			
2.2	Sub-task			
2.3	Sub-task			
2.4	Sub-task			
2.5	Sub-task			
WP 3	**Main Task**			
3.1	Sub-task			
3.2	Sub-task			
3.3	Sub-task			
3.4	Sub-task			
3.5	Sub-task			
3.6	Sub-task			

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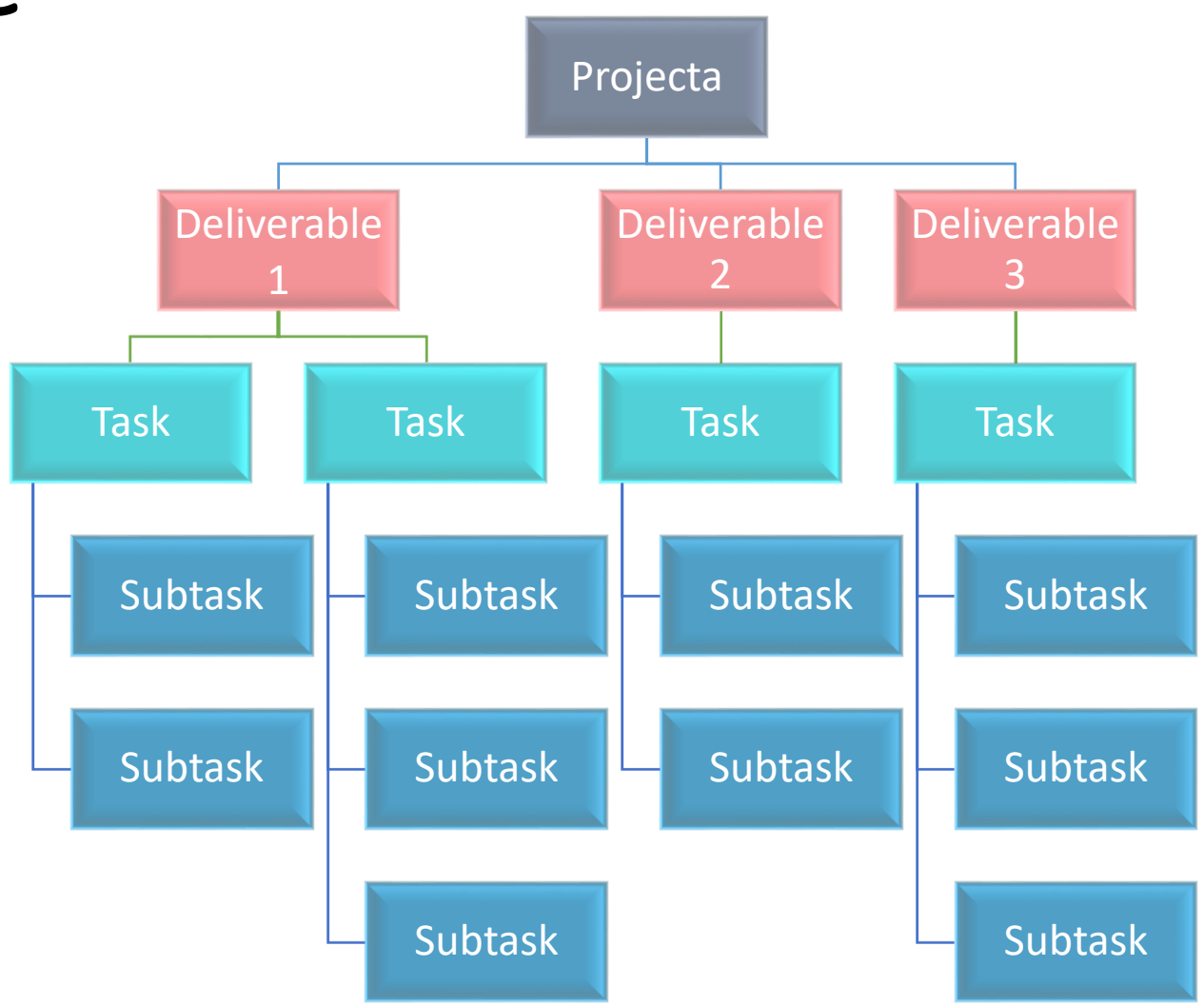
WBS sample



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The project schedule – Gantt chart

- The project schedule precisely defines deadlines and duration of all tasks needed to achieve the objectives.
- The graphically displayed schedule is called a Gantt chart.
- It is a basis (and a tool) for monitoring/controlling the progress of the project during the execution phase.
- Gantt chart is a horizontal bar chart in which members can see what tasks must be completed in what order, and how long each is expected to take.

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Gantt chart sample

No	Task	Year 1												Year 2											
Months		1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
WP 1	Main Task																								
1.1	Sub-task																								
1.2	Sub-task																								
1.3	Sub-task																								
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3.6	Sub-task																								

Develop a budget

- The budget reflects the costs necessary to perform the activities.
- Although budget formats and requirements differ among funding agencies, the following is standard for the development of budgets.
  - Personnel
  - Fringe Benefits
  - Travel
  - Equipment
  - Supplies
  - Contractual
  - Other

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Budget estimation methods

Analogous

- This estimate technique uses the actual costs of a previous, similar project for the basis for estimating the costs of the current project.

Top-down

- It is a budget estimate when the total project budget is known and the project needs to know the costs of each individual activity, in this scenario the project determines the number of activities or outputs the project can produce with a given budget.

Bottom-Up

- Estimate requires estimating the individual activities and the cost of each input and is adding them up to get the project total.

Parametric

- Estimates use standardized parameters that define the costs of an activity or task for a specific rate or output. For example the costs of training one person are a rate that can include people, material and equipment costs that once it is multiplied for the required number of people that need to be trained, gives the total budget for the activity.