

PROJECT PROPOSAL TRAINING MODULE



**ILOILO CAUCUS OF NON-GOVERNMENT ORGANIZATIONS (ICODE), INC.
ACTION FOR HEALTH INITIATIVES (ACHIEVE)**

**PROJECT DEVELOPMENT and MANAGEMENT and
PROJECT PROPOSAL WRITESHOP SESSION**

Training Duration: 3 days or 25 hours (Live-in)

Training Participants: Project Manager, Senior Program Officers, Finance Officer or Project
Technical Consultant: (3 per Organization)

Rationale:

The training on Project Development and Management & Project Proposal Making is part of the series of capacity development training interventions. In particular the training session aims to capacitate the stakeholders by

- **Appreciation of their Organization Strengthen to access development opportunities for more effective and meaningful partnership engagement for the sustainability of the organization**
- **Improving local intervention action initiatives or social services innovations of the LRO and CBO that need to be captured, documented, showcased for sustainability, upscaling or replication**
- **Enhancing the local capacity in generating winning project concepts but need more guidance in packaging and making project pitch**

They would also be capacitated on strategic engagement framework for CSOs work on responsive participatory planning, brainstorming, designing, budgeting, and implementation management. The participants will be guided in identifying opportunities for effective CSO/citizen engagement in the local mechanisms for meaningful service delivery to the community, with inclusive participation of stakeholders.

Participants: 20 Participants (each Batch)

Objectives

General Objective

At the end of 3 days the learners in Project Development and Management & Project Proposal Making Workshop aims to capacitate the stakeholders by undergoing the rigors of participatory action planning, brainstorming, designing, budgeting, and implementation management in order to craft winnable project concept notes or proposals.

Specific Objectives :

1. To guide the participant-learners in identifying opportunities for effective CSO/citizen engagement in the local mechanisms for improved service delivery to the community or stakeholder sectors they serve

2. To discover and appreciation their Organization Strengths to match the development opportunities for more effective and meaningful partnership engagement for the sustainability of the organization
3. To conceptualize and design CBO institutional intervention action, initiatives or social services innovations that addresses the needs of the LGU community sector they serve;
4. To capture, document, showcase good practices in the form of winning project concepts done in good package and attention getting project pitch

Training Team : (3 per Event)

1. Team Leader
2. Co-Facilitator
3. Resource Person (technical specialist)

Session Design:

Training Plan: Training on Project Development and Management and Project Proposal Making					
Day/Time	Topic (Narrative Description)	Learning Objectives	Methodology	Logistics	Responsibility Center
Day 1					
8:00-9:00 AM	Registration of Pax	Registration		IDs Attendance Sheet	Admin -Secretariat
9:00 AM -9:30	Opening Activity -Prayer -Pambansang Awit -Message from ACHIEVE	Opening Program	Preliminaries Welcoming	Music PPT LCD Training Team	Training Coordinator ACHIEVE Executive Director
9:30 – 10:30 AM	Self-Introduction House Rules Host Team Formation Expectation Check	Getting to Know each other - familiarization of participants and training team	SLE : Creative GTKY		(Training Facilitator)
10:00 -10:45 AM	Health Break				
PART 1 : Project Development and Management					
10:45-12:00	Session 1 The PPBIME Framework <i>and CSO engagement in Planning and Budgeting Approach</i>	Session Objectives 1. The learners will be able identify the flow of Project Management cycle of the LGU for effective and responsive engagement with the local government 2. To explain how can CSOs work effectively through participation in local development planning, programming,	Lecturette and Group discussion on experiences Feedback giving	LCD PDM Cycle Flow Chart and Calendar Power point presentation	Facilitator

		designing, budgeting, implementation management 3. Basing on the Project Management cycle of the LGU, participants will be familiarized with development engagement framework of the government			
12:00 – 1:00 LUNCH BREAK					
1:00 PM -1:30 PM	Energizer		Creative Multi-dimensional		Host Team
1:30 – 2:30pm	<i>Session 2. Ways of Inclusive CSO engagement in Planning and Budgeting Approach</i>	Session Objective The learners will be able Identifying arenas for inclusive CSO/citizen engagement for meaningful social contracting of projects with LGUs	Lecturette Discussion	Public Development cycle management PDMC Calendar Avenues of Participation Matrix/ Checklist of arenas of engagement	Facilitator
2:30-3:30pm	<i>Session 3 CSO Participation in Local Planning and Development Councils</i> Approaches in Engagement (Passive, Advocate, Fiscalizer, Critical Collaboration, Partnership) Ways of Engagements: Procurement of Services, As service provider, as Oversight (M&E)	Session Objectives 1. The learners will be able identify possible arenas where they can effectively interact with the LGU/Community Sectors 2. The explain the importance of the roles of CSOs in Project Proposal Development and Implementation in LDC, LSBs, Special Committees of the LGU / LGA	Lecturette/ Interactive Discussion Group Discussion	DILG Joint Memorandum Circular 2023 PPT - DILG Roles of CSOs in the Local Development Council	Facilitator
3:30 – 4:30 PM	Session 4. Stakeholders Analysis Review of the existing Strategic Engagement Plans by assessing their	Session objectives : 1. The Learners with be able to map out and assess their current internal capacities, external opportunities	-Breakout group (5 orgs) for the workshop	Copies of strategic plan per TOWS analysis Stakeholders Map (Level of Relationship)	ACHIEVE Training Coordinator Break out Group (grouping Participants

	<p>current internal capacities, external opportunities</p> <p>Sub Session 4.1 Review of organizations' strategic plan/TOWS Analysis</p> <p>Strategic Engagement Plan and SWOT Analysis will be used to identify possible and appropriate project or activity proposals to improve their ways of engagement and effective social contracting with external partners (LGUs, Private Sector, Donors, etc).</p>	<p>2. To match their institutional strengths with Strategic Engagement opportunities offered by external partners (LGUs, Private Sector, Donors, etc).</p> <p>3. To come up with long list of possible and appropriate project or activity proposals to improve their ways of engagement and effective social contracting with partners</p>		<p>Directory of External Partners</p> <p>LCD Projector per group Metacards, zoop boards (2 pcs), masking tapes, pentel pens</p> <p>Manila Paper</p>	to their respective Organization's)
4:30 – 5:00pm	Daily Evaluation and announcement	Evaluation			Training Team
Day 2					ACHIEVE Admin
Date/Time	Topic	Learning Objectives	Methodology	Logistical Needs	In-charge
Part 2: Introduction on How to Develop Winnable Proposals					
8:00 – 8:30am	Prayer, Energizer, Course Recap and Daily Evaluation Result		Pre test on Project Proposal Writing	Multi dimensional Group Dynamics	Host Team 2 Facilitator
8:30: 9:15	Session 5-A Problem tree/ Identifying the Core Problem, the Cause and effect) CSO Engagement with the Development Partners	<p>Session Objectives</p> <p>1. The Learners will be able to appreciate and deepen their understanding the context where the CSO is Operating</p> <p>2. To identify the challenges that it has encountered and critically pinpoint the Root Cause of the Problem)</p>	<p>Lecture / Discussion</p> <p>Mini-Workshop</p>	<p>Metacards, Manila Paper Masking Tape, Pentel pen</p> <p>Problem Tree Sample</p>	Facilitator
9:15-10:00	Sub-session 5-B Solutions Tree				

	Transforming the Core Problem, the Cause and effect in Solution / Action Response to address Cause and effect)	3. To Identify the underlying cause and effect of the problem 4. To find opportunities that would help unlock the keys that support the innovative solutions 5. To determine courses of action to address the core problem		Solutions tree Metacards, Manila Paper Masking Tape, Pentel pen	Co-Faciliator
10:00 – 10:15AM – Coffee Break					
10:15 – 11:00	Session 6. Introduction to Writing Winnable Project Concept Notes, Proposal	Session Objectives 1. To Unlock development potential of oneself and the organization 2. To identify the sellable points) in relating with other development partners	-My Most Winnable Story - Pulse Check -Powerpoint presentation and discussion	Name Tag / HashTag (3 boxes) Zopp Boards Manila paper Meta cards Pentel Pens Masking Tapes Push pins -LCD Projector	Facilitator
11:30 – 12;30pm	Session 7. Why the need for a Project Proposal Tips in Making winnable project proposal :: The frameworks and tips in crafting development projects of upstart CLO and CBOs, Groups for collaborative projects with LGUs and other development partners	Session Objectives 1 The Learners will be able to explain the importance and value of a project proposal; 2.To appreciate the frameworks and tips in crafting development projects of upstart CLO and CBOs, Groups 3. To identify possible partners to support collaborative projects with LGUs and other development partners	-Lecturette with Open discussion	Power point presentation organization LCD projector	Facilitator/ Resource Person
12:30 – 1:30 pm – Lunch Break					
1:30 – 1:45 PM	ICE Breaker			Host Team 1	
1:45-2:10 PM	Session 8. Idea Generation A (Identifying out of the Box Solutions and innovations How to use brainstorming techniques in order to extract the	Session Objectives 1. The learners will be able generate ideas, out of box solutions, through the use of brainstorming techniques 2. To unlock the barriers of conventional thinking blocks the creative and innovative thinking	Brainstorming Exercises Creativity Quotient test (On line)	SLE Tools; WORDLES Puzzles Connect 9 Dots Remove SEVEN Letters How Many Squares?	Facilitator

	creative juices of the learners			Creativity Questionnaire	
2:10-3:10	<p>Sub-Session 8. B</p> <p>IDEA Generation</p> <p>To enhance the learners capacity in generating ideas using the Appreciative Inquiry Approach (AIA) in order for them to re-Discover their latent organizational potentials that would enable them to design innovative project concepts that effective engagement with the LGUs and other development partners or funders.</p>	<p>Session Objectives</p> <ol style="list-style-type: none"> 1. The participant are able to re- Discover their bests (capabilities, talents, products), to Dream what they want to do 2. To Design Project Ideas for a strategic engagement services , initiatives of the CSOs in working the LGU or development Partners in accordance with its institutional development mandate. 	<p>Structured Learning Exercise: IDEA Generation</p> <p>Workshop: Ways of Improving things...., through on participatory planning, brainstorming, designing, and implementation management.</p>	<p>Picture Association : What Products, Services, or Innovations that could be developed</p> <p>Pictures of CBO Activities, Services or advocacies, of similar Groups / Sectors</p> <p>Workshop: List to 3 Project Innovative Ideas</p> <p>Manila Papers. Pentel pens</p>	<p>Facilitator</p> <p>Group Facilitator Documenter Rapporteur</p>
3:10-3:40	<p>Sub-Session 8C : IDEA Enhancement ; More bright ideas generation</p> <p>Using the UN Carousel Learning Sessions will enable the participants to give comments, give constructive feedback, to share or exchange ideas that would enable to each other to select and prioritize the best among the idea.</p>	<p>Session Objectives</p> <ol style="list-style-type: none"> 1. The participants will be able to give comments, give constructive feedback, to share or exchange ideas that would enable to each other groups to select and shortlist and prioritize the best among the project idea. 	<p>Carousel Type of Feedback</p> <p>Idea sharing</p>	<p>Feedback to Project Ideas: Likes/ Post Notes Ways to improve /enhance the Ideas</p> <p>Post stickers, papers, Stickers</p>	<p>Group Presenters Feedback Givers</p>
3:40-4:30 PM	<p>Session 9 : Project Idea Selection (Micro – screening Criteria)</p>	<p>Session Objectives</p> <ol style="list-style-type: none"> 1. The learning organization will be able to select the top 1 	Lecturette	<p>Micro-screening Considerations</p> <p>Matrix with Ranking system</p>	<p>Facilitator</p> <p>Workshop Groups</p>

	The Micro-Screening Business Test is used to determine the viability of the Project in term of Criteria such Market/Client Need, Skills Availability, Financial. Ease of Implementation, Government Policy, Risks Factors	Project idea that would be considered to Project Concept note 2. To determine the viability of the Project for a winnable proposal with due consideration for of weighted scores	Idea Rating and Ranking Exercise	Micro Screening Checklist Result Presentation	
4:00 – 4:15pm – Working Coffee Break					
Part 3: Project Concept Note /Mini-Proposal Preparation with Work and Financial Plan					
5:00 - 5:30 PM	<p>Session 10 Concept Note Preparation</p> <p>Enhancing the local capacity in translating the selected Project Idea by the way of generating winning project concepts thru guidance and tip in packaging proposal</p> <p>From Concept Note into a Mini or Full Proposal</p>	<p>Session Objectives :</p> <ol style="list-style-type: none"> 1. The learners are able to explain the importance of a Project Concept Note or Project Brief 2. To craft as a design with the Essential Main Contents of the Concept Note 	<p>Breakout groups</p> <p>Walk Through of Steps in Project Concept Note Preparation</p> <p>Tips in Concept Note/Proposal Writing</p> <p>Writeshop 1</p>	<p>Guidance Framework for LGU, Donors, Funders</p> <p>LCD Projector per group Metacards, zoop boards (2 pcs), masking tapes, pentel pens, Manila Papers</p>	Resource Person
5:30 – 6:30pm	<p>Session 11, Activity: Intervention Plan Preparation : Program Planning</p> <p>The Writing logical intervention action initiatives related to the proposed project concept</p> <p>Detailed Target outcome and performance, indicators, timetable for</p>	<ol style="list-style-type: none"> 3. The participants will be to brief description of the Proposed Project Concept 4. To the enumerate the main components of the project using logical intervention action initiatives 5. To make brief detailed Target outcome and performance, indicators, timetable 	<p>Lectuerette / Discussion</p> <p>Mini Exercise</p>	<p>Power point Presentation of Sample Plan GANTT</p> <p>GANTT Chart Template</p>	Resource Person

	easily tracking of results				
6:30 – 7:00 pm	Daily Evaluation and announcement	Synthesis of the Day 2	Evaluation	Daily Smiley Evaluation Form	Host Team 1
Day 3 –					
8:00 – 8:30 am	Prayer, Energizer, Course Recap and Daily Evaluation Result		Group Dynamics	Multi dimensional	Host Team 2
8:30 – 10:00 am	Session 12. A, Project Proposal Budgeting > Budgeting Principles (Budget Transparency and Accountability Standards) > Fund Sourcing > Financial Equity, Counterparting > Funder . Donor guidelines	Session Objectives 1. The learners are able to prepare a draft of financial plan for the implementation of the Project using the accepted industry standards and funders TOR 2. To make a Summary Breakdown the budget (Total Project Cost, Direct Cost, Indirect Cost) and Proposed Grant Request, Equity	Workshop 2	>Funder . Donor guidelines Financial Ratios Cost Benefit analysis Budget (WFP Template)	Resource Person
10:00 – 10:15 am	Coffee Break				
10:15- 11:00	Sub Session 12B Draft Detailed Work and budget Planning	3. To explain the reason for Budget Plan for the appreciation of the panel	Breakout groups Writeshop 3	LCD Projector per group Metacards, zopp boards (2 pcs), masking tapes, pentel pens	Break out Groups
12:00 – 1:00 pm – Lunch Break					
1:00 – 1:15 pm	Energizer	Group Dynamics	Multi dimensional	Host Team 2	
Part 4: Project Concept Note/Mini-Proposal Presentation					
1:15 – 2:30 pm	Session 13 . Draft Presentation of (Simple Project Brief) Intervention Plans and Budget CBO will walk through the process of ways of capturing the essential elements	Session Objectives After CBO walk through exercise I. The participants will be able to transcribe the essential elements of the Project concept note	Plenary – 3 groups to present (20 mins per group)	LCD Projector Work & Financial Plan (WFP) Presentation	3 group presenters Panel of Reviewers

	of the Project concept documented, showcased for sustainability, upscaling or replication Feedbacking of the Panelists	<ol style="list-style-type: none"> To Draft a Presentation of (Simple Project Brief) Intervention Plans and Budget To make initial adjustments and corrections based on the Feedbacks 			
2:30-3:30 pm	Session 14 The Project Concept Note Finalization	<ol style="list-style-type: none"> Guidance and tips in enhancing winning project concepts Guidance in evaluation of Project Concepts 	<p>Lecturette And Group discussion</p> <p>Writeshop 4 feedback giving</p>	<p>LCD Power point presentation, Manila Paper, Pentel Pen, Cartolina, Masking Tape, Easel Stands</p> <ol style="list-style-type: none"> Viability Testing Tools Project Evaluation Guide 	<p>Resource Person</p> <p>Break out Group Participants</p>
3:30 pm – 4::00	Coffee Break				
4:15-4:45 PM 4:45-5:15	<p><i>Session 15 Trial Project Proposal Pitching</i></p> <p>CBO will be oriented / walked through the process of essential elements of the Project concept and pitching techniques to the donor / panelists</p>	<p>Session Objectives</p> <p>After the orientation / walk exercise by the CBO</p> <ol style="list-style-type: none"> The CBO will be able to select a representative participant who do Project concept pitching To prepare the short pitching material (5-7 minutes)techniques to the donor / panelists 	<p>Lecturette/ Group Discussion</p> <p>Preparation of Pitching Materials</p>	<p>Full Concept Note or Mini Proposal with WFP</p> <p>Viability Test Matrix</p> <p>Sample Template PPT</p> <p>LCD, LapTop, Manila Paper, Pentel Pen, Cartolina, Masking Tape, Easel StandsTips in Making Project Pitch to the Donors</p>	<p>Break out Groups</p> <p>Panelists</p>
5:15 – 6:00pm	<i>Session 16 A, Project Proposal Presentation Pitch</i>	<p>Session Objectives</p> <ol style="list-style-type: none"> The Presenter will be able to practice 	5-7 Minutes Presentation	LCD, LapTop, Manila Paper, Pentel Pen,	Panelists

	to Panel of Evaluators CBO will be oriented on the undergo the process of capturing the essential elements of the Project concept in a crisp, succinct and brief document to be showcased for viability testing	and apply the Tips on Project Concept Note Pitching		Cartolina, Masking Tape, Easel Stands Time Keeper Project Pitch Material /PPT	5 Group Presenters
6:00- 6.15 PM	Session 16B Project Presentation and Evaluation	Actual Project Short Elevator Pitch 2. The Presenter will be able to demonstrate Project Concept Note in a short Elevator Pitch	Elevator Pitch (note more than 5 minutes) Feed Backing Areas to Improve	Presentors Scoring Charts Feedback Forms Time Keeper Awarding Ceremonies	Panelists
6:15 – 6:30PM	Ways forward/Re entry planning		Plenary Discussion Next steps	LCD Projector	Facilitators, ACHIEVE Team
6:30-6:45 PM	Overall Training Synthesis	Training Synthesis	Summary of Learnings and Insights LCD ; PPT of Summary Outputs	Facilitator/ACHIEVE Team	
	Evaluation and Closing Activity		Certificates of Completion Evaluation Form Training Team	Amara / ACHIEVE Team Facilitator	
7:00 PM	CLOSING / DINNER Departure				

Requirements/Qualifications of the training facilitators/team:

Training Team Member	Competency Requirement	Skill sets needed	Mean of Verification
Resource Person	Experience and Expertise on the Topic	Power Point Presentation Digital Technology knowhow Communications Skills	Curriculum Vitae, TIN, Related Trainings Conducted
Main Facilitator	Expertise on Assigned Topics, session Experiential Learning Approach Use of Multi-Media Platforms	Learning Module Design preparation Facilitation Skills Technology of Participation (Evocative learning approach)	Curriculum Vitae, TIN, Related Trainings Conducted /Facilitated
Co-Facilitator	Expertise on Assigned Topics, session Experiential Learning Approach Know how on Multi-Media Platforms	Technical Back up support to facilitator Workshop facilitation, Preparation Training Materials, Kits, Tools, etc.	Curriculum Vitae, TIN, Related Trainings Facilitated
Documenter	Technical Writing and Documentation	Narrative, Photo documentation Writing Skills	CV, Sample of Documentation Works
Training Administrator	Training Management	Procurement of Training Supplies Preparation of Venue Logistical Support to Trainers Financial/Admin Support to participants and partners	CV Related Trainings/Activities Administered

Materials Needed:

1. Notebooks and pens for pax
2. Manila papers – 15 rolls
3. Masking tapes – 1 inch width – 3 rolls
4. Pentel pens – assorted colors – 1 box
5. LCD Projector
6. Metacards – assorted colors – 100 pcs
7. Push pins
8. Zopp or metaboards
9. Microphones; Public Address systems
10. Problem tree/Solutions tree diagram
11. 5 sets of Large Pictures (e.g. LGBT Rights Advocates; RH Service Clients, or Health Clinic/Medical Mission, etc)
12. Micro screening Criteria
13. Matrix Sample Concept Notes

14. Creativity Quotient Test
15. Standee ACHIEVE / ICODE Project
16. Tarpaulin for backdrop
17. Training standee
18. Post it stickers (3 colors)
19. Camera/VideoCam
20. Printer
21. Training Certificates
22. Samples of Project Proposal , pitch
23. Project Viability test Tool
24. Prizes for Game (Candies, or Supplies)

