Webinar 3. Preparation stages of a successful offer.

Checking homework. Discussion.

1. Checking the format and criteria of an offer submission.
2. Understand Business Case, Project Scope and Requirements.
3. Determine the problem and develop a way to solve the problem (SMART goals, CLEAR goals)
4. Identify stakeholders (stakeholders influence grid)
5. Create a project schedule - Gantt Charts for Plans
6. Develop a budget.
7. Summary. Q&A session.
8. Homework. Draft description of potential project elements (initiation and planning stages).

1. Checking the format and criteria of an offer submission.

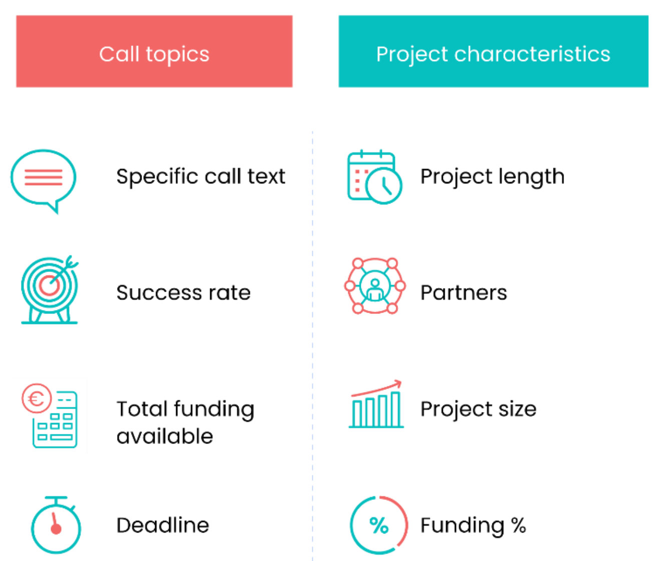
Careful consideration of the opportunity

Once you have identified one or more calls that look interesting at a first glance, then it is important to read the requirements carefully to make a choice to pursue the opportunity.

Important factors to consider when you consider and read a call for proposals include factors such as the total funding available, the deadline of the call etc.

Some of the key issues to be considered are illustrated in the Figure 1. Careful consideration needs to be given to these matters as this have a large impact on the potential success of potential application. Careful consideration of these factors will also allow you to make a short list of the best opportunities to respond to. The latter will allow you to target your efforts better and invest your time and resources more effectively.

Figure 1: Important factors while you consider funding/grant opportunities



Source: www.Eufundingplaybook.com

2. Understand Business Case, Project Scope and Requirements.

The tender invitations and calls for proposals include all the information needed to submit a proposal or a bid. Some of the main points to be identified early on involve the following

1. **Call objectives and outcomes**: Results and types of activities expected from your project.
2. **Funding amount:** the minimum and maximum amount of funding available for a project.
3. **Funding rate**: Requirements for your own contribution to the costs of the projects, and related requirements for disbursements linked to certain financing milestones
4. **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.
5. **Duration**: minimum and maximum duration
6. **Single stage or two-stage** requirements regarding stages of Proposal submission.
7. **Deadlines**: 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![1]

3. Determine the problem and a way to solve it (SMART goals, CLEAR goals)

Once you have understood all the requirements of a funding opportunity, then you may initiate the project Initiatin and/or design stage. During this phase the project idea is formed, and the project is developed. After which during the Planning phase the project implementation steps are clarified, and the plan of project implementation steps are clarified. The steps in these two phases may include:

Initiation Phase	Planning Phase
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,	Deliverables are clearly defined Based on the deliverables, a work breakdown structure or WBS defines the "work packages" The work packages are used to develop a schedule

[1] Eufundingplaybook.com

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	Plans are made for management of stakeholders, communication, quality, costs, risks, procurement, resources including human resources

When designing a project, it is important to determine what issue the project is supposed to address. High 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 so that the focus of the project is on actual needs in the community and underlying factors that prevent the community from achieving its long-range goals. **A community assessment** can help identify such problem(s) and determine what the priority issues are that a project needs to address.

There are several methods of conducting a community assessment (Focus Groups, Community Mapping, Stakeholder Analysis, Community Scales, Problem Tree, Survey Research, Strength, Weakness, Opportunities, and Threats (SWOT) Analysis and so on) and different methods are appropriate for different situations. The method used should be selected based on the information you are collecting in order to produce a useful result.

Once you have completed your community assessment, you can define and describe problems in your community. The next step is to select the problem or problems you wish to address with your project through a community-based planning process. A project is generally more successful if it focuses on either one large problem or a small amount of specific problems, as this will help keep the scope of your project within achievable boundaries. Once any problems to be addressed have been identified, the community can design solutions to reduce or eliminate the identified problem. The ideas will directly address the list of problems to be overcome and will become the basis for your **problem statement**. **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.

Two of the more popular methods for setting goals are S.M.A.R.T. and CLEAR. 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. The C.L.E.A.R. is a newer method for setting goals that takes into consideration the environment of today’s fast-paced businesses.

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.

C.L.E.A.R.

Collaborative – The goal should encourage employees to work together.

Limited – They should be limited in scope and time to keep it manageable.

Emotional – Goals should tap into the passion of employees and be something they can form an emotional connection to. This can optimize the quality of work.

Appreciable – Break larger goals into smaller tasks that can be quickly achieved.

Refinable – As new situations arise, be flexible and refine goals as needed.

4. Identify stakeholders (stakeholders influence grid)

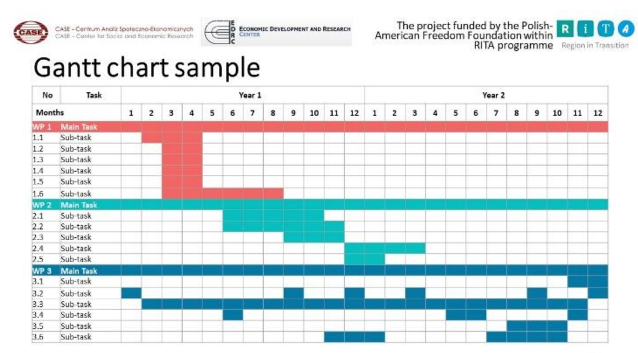
The next fundamental of the project planning is to figure out who will be involved and who are the stakeholders of the project. That is, which functions or people might be affected by the project's activities or outcomes, who will contribute resources (people, space, time, tools, and money), and who 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. After identifying all stakeholders of the project, they 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.

The final step of a stakeholder analysis involves developing a strategy for how best to involve different stakeholders or groups in the project. This can involve designing specific methods of presenting the project to each group that will spark their interest and lead to their support. The stakeholder process can also help to identify partnership opportunities for the project.

5. Create a project schedule - Gantt Charts for Plans

The project work is organized around a **work breakdown structure (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.



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)

After formulation of the project goals, activities or tasks, the **project schedule** must be organized. It precisely defines deadlines and duration of all tasks needed to achieve the objectives. The graphically displayed schedule is called a **Gantt chart**, and it is a basis (and a tool) for monitoring/controlling the progress of the project during the execution phase. A 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.

6. Develop a budget

The budget reflects the costs necessary to perform the activities of the project and must be reasonable and tied to the project objectives and work plan. Budgeting is the method by which an organization translates the project goals and objectives into the resources necessary to accomplish the goals and objectives. 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

There are four basic methods to estimate a budget:

- **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** estimate, 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.

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