



Sattva Partner Network NGO Session: How to effectively write Proposals

June 2022



Agenda

#	Topic	Duration
1	Introduction and context setting	10 minutes
2	Understanding the key components of a proposal, best practices to follow and budgeting	80 minutes
3	FAQ Session	30 minutes

Speaker Profiles



Saloni Gupta
Senior Engagement Manager, CSR Advisory

Saloni is part of Sattva's CSR Advisory unit in Mumbai. She has over 12 years of experience working in diversified fields of strategy consulting, capacity building and event management. Her focus has been in the development sector, working with different social businesses, understanding their challenges, providing intensive mentoring and coaching and implementing robust business and financial plans for their growth.



Urmi Patil
Senior Consultant, CSR Advisory

Urmi has been working in the social impact ecosystem for the past 6 years, ranging across functions such as implementation, strategy, and programme management. Over the past three years, she has worked with 15+ corporations, formulating and enabling their CSR objectives.



Sarthak Malhotra
Analyst, CSR Advisory

Sarthak is a an Analyst with Corporate Advisory Team in Delhi. He has keen interest in programme design development and strategy across the thematic areas of Skilling and Livelihood, Healthcare, Education and Environment.

Key Sections in a Request For Proposal Template

Sections	Sub-Sections
Project Design	<ul style="list-style-type: none"> • Project Objective • Rationale (Secondary and Primary Data Backed) • Focus Sector • Schedule VII • Target Geography • Target Segment • Timeline
Execution Approach of the Project	<ul style="list-style-type: none"> • List of major milestones and activities in the Project • List of Key Outputs, Outcomes and Impact • Execution Approach – In detail on-ground implementation plan • Risk and Mitigation Plan
Budget	<ul style="list-style-type: none"> • Link to the Budget Sheet • Cost structure of the program • Preferred Payment Schedule
Project Management Plan	<ul style="list-style-type: none"> • Monitoring Approach • Key Performance and Monitoring indicators
Project Team & Declaration	Information about the on-ground project implementation team
Annexure – Organisation Profile	<ul style="list-style-type: none"> • Organisation Background • Organisation’s Philosophy • Organisation Processes • Key Capabilities • Organisation’s Financial Information • Key Projects and Donors • Published key reports or videos

Best Practices to follow while writing RFPs



1. Using relevant data points to build rationale and objectives for interventions proposed



2. Keeping logical timelines project milestones and activities



3. Providing project relevant and quantifiable outcome and output indicators



4. Explicitly state rationale behind calculation of planned outcome figures

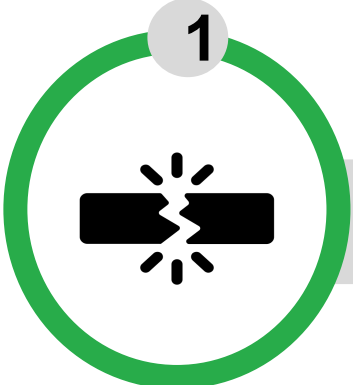


5. Provide well articulated project monitoring plan in detail with clear governance structure



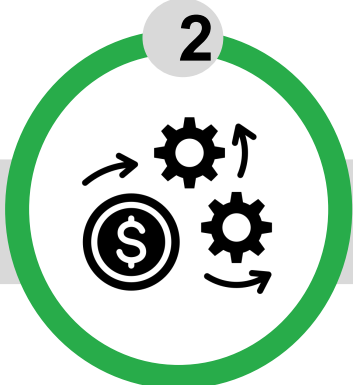
5. Cite case studies/success stories from previous or current projects

Best Practices to follow while filling Budget Templates



Break It Down Into Line Items

- A budget is not just about the final number
- Always break it down into line items
- Use materiality and your own judgement to break it down



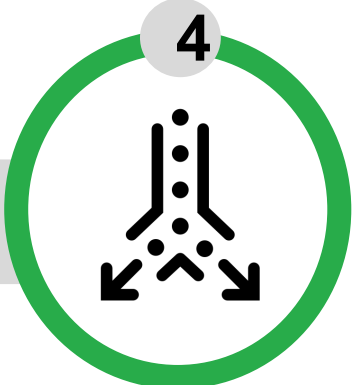
Consider Cost Drivers to Group Line Items

- Group the line items into major cost drivers
- Typical major cost drivers include project staff salaries, outreach & mobilization, travel, rentals, reporting, etc



Consider the Time Period of Each Line Item

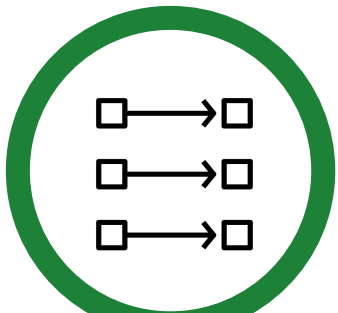
- An annual budget must include a breakdown of monthly estimates of each line item



Differentiate Direct and Indirect Costs

- Differentiate all major cost drivers into direct costs, indirect costs and admin overheads

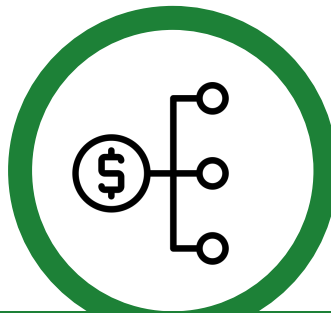
Classification of Costs into Direct Costs, Indirect Costs and Admin Overheads



Direct Costs

- ✓ Directly attributable to project
- ✓ Incurred at project level
- ✓ Purely allocated to the project (100% allocation)

- Infrastructure set up
- Project-specific operational costs
- Project implementation staff salaries
- Beneficiary outreach and mobilization



Indirect Costs

- ✓ Not directly attributable to project
- ✓ Incurred at project level
- ✓ Partially allocated to the project (usually % allocation)

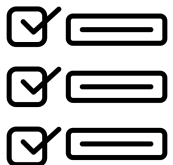
- Project management staff salaries
- Project management staff travel costs



Admin Overheads

- ✓ Not directly attributable to project
- ✓ Incurred at org level
- ✓ Partially allocated to the project (usually % allocation)

- Org level audit fees
- Admin staff salaries
- Org level project review meeting costs
- Head office costs



Criteria



Usual Suspects