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REFERENCE MANUAL ON

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# PROJECT PROPOSAL WRITING FOR PACIFIC CIVIL SOCIETY ORGANISATIONS

Developed by

TALANO  
CONSULTING



INSIGHT  
PASIFIKA

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# Introduction

## PURPOSE OF THE MANUAL

The primary purpose of this ready-reference manual is to provide Pacific civil society organisations (CSOs) with a practical and comprehensive resource to enhance their capacity in developing robust project proposals. Funded by the Foreign, Commonwealth and Development Office (FCDO), this manual serves as a companion to the training sessions delivered by Talanoa Consulting and Insight Pasifika, offering detailed guidance on proposal development processes, best practices, and essential tools. By using this manual, CSOs will be better equipped to articulate their project ideas, secure funding, and effectively manage their projects to achieve impactful outcomes.

## HOW TO USE THIS MANUAL

This manual is designed to be a user-friendly, go-to resource for all aspects of proposal development. To maximise its utility, follow these guidelines:

- 1. Start with the Training Sessions:** Participate actively in the training sessions. The manual supports these sessions by providing details, examples, and exercises to reinforce your learning.
- 2. Use Specific Sections:** Use the table of contents to quickly navigate to specific sections relevant to your needs, whether it's understanding funding requirements, crafting a proposal narrative, or developing a budget.
- 3. Engage with Exercises:** Complete the exercises and group activities provided in the manual. These practical tasks are designed to help you apply the concepts and techniques discussed.
- 4. Explore Additional Resources:** At the end of each module, links to examples, templates, and other useful resources are provided to further support your learning and streamline your work.
- 5. Review the Requirements:** Each proposal development process is different, so it is important to check you meet the specific donor requirements for the specific proposal.
- 6. Review and Reflect:** Regularly review the lessons and best practices outlined in the manual. Reflection and continuous improvement are key to mastering proposal development.

## OVERVIEW OF THE MANUAL AND TRAINING PROGRAM

The training program is a targeted initiative aimed at building the proposal development and drafting skills of smaller civil society organisations in the Pacific region. The training sessions are structured to address the specific challenges faced by these organisations when applying for grants and other funding opportunities.

**Objectives:**

- To understand the proposal development process.
- To identify the key components of a strong project proposal.
- To conduct effective research for proposal writing and problem analysis.
- To craft clear and concise project objectives and outcomes.
- To develop realistic project budgets and timelines.
- To create effective monitoring, evaluation, and learning (MEL) frameworks.
- To identify sources of funding and tailor proposals to specific funders.

By the end of the training programme, you will have gained the knowledge and skills necessary to develop compelling project proposals that meet donor criteria and are aligned to yours and their organisational goals. This manual will serve as an ongoing resource to support your proposal development efforts, ensuring that you have the tools and information needed to succeed in securing funding and implementing impactful projects.

**THE IMPORTANCE OF CULTURALLY AND CONTEXTUALLY RELEVANT PROPOSAL DEVELOPMENT IN THE PACIFIC**

In the Pacific region, proposal development should be deeply rooted in the unique cultural and environmental contexts of island communities. To create effective and sustainable projects, it is essential to design proposals that respect and reflect the values, governance structures, and lived realities of Pacific societies.

The 2050 Strategy for the Blue Pacific Continent calls for development initiatives to prioritise long-term sustainability, resilience, and self-determination for Pacific Island nations.

A crucial element of this approach is the inclusion of culturally relevant practices in every stage of proposal development. This involves working closely with local communities, traditional leaders, and other stakeholders to ensure that their perspectives and knowledge are integrated into project design. Engaging local stakeholders early fosters community buy-in and enhances the long-term sustainability of the project. It also ensures that proposals reflect the reality on the ground, rather than imposing external ideas that may not align with local needs.

Your proposal should reflect your deep understanding of the contextual realities of the Pacific—such as the geographic isolation of many islands, vulnerability to climate change, and reliance on communal decision-making—as this supports more effective and relevant project design. Proposals that integrate relevant data (such as baseline assessments, census data, and reports from government or local partners) demonstrate a strong foundation of knowledge and are more likely to capture the attention of donors.

By designing projects in this way, the proposal process itself can strengthen partnerships, foster community ownership and create solutions that are deeply rooted in local contexts.

# Module 1

## Understanding Proposal Development



### Learning Outcomes

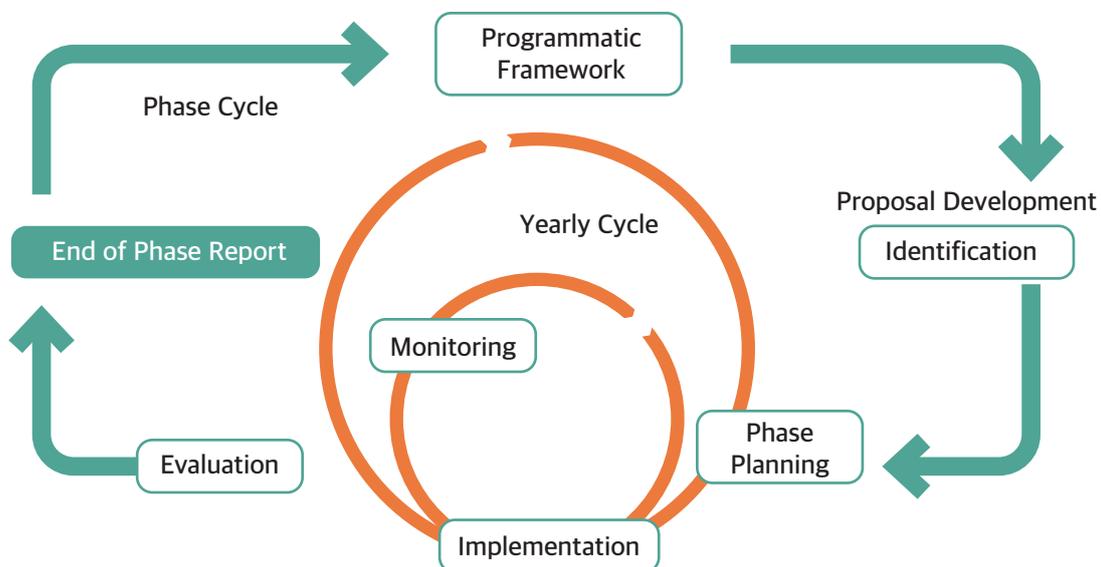
- You will understand the proposal process and identify the key components of strong proposals and learn to craft clear and concise objectives and outcomes.
- The ultimate goal is empowerment as you will be able to apply your learning to real projects and strengthen your capacity to manage projects effectively and sustainably.

### WHAT IS A PROJECT PROPOSAL?

A project proposal is a detailed plan that outlines the objectives, methodology, budget, and expected outcomes of a project. It serves as a formal request for funding or approval from stakeholders or donors. The proposal should convincingly communicate the value and feasibility of the project, addressing the specific needs it aims to solve and demonstrating how it aligns with the priorities of the funding organisation.

Proposal development is an essential part of 'identification' stage in the Project Management Cycle. It creates a detailed plan for the project, including its goals, strategies, methods, budget, and monitoring and evaluation plan.

### Project Management Cycles



A well-crafted project proposal includes:

- Project Title and Summary: A concise overview of the project.
- Problem Statement: A clear explanation of the issue the project aims to address.
- Objectives: Specific, measurable, achievable, relevant, and time-bound (SMART) goals.
- Methodology: Detailed steps and strategies for achieving the objectives.
- Budget: An itemised list of costs associated with the project.
- Timeline: A schedule outlining the key phases and milestones.
- Monitoring and Evaluation (M&E): Plans for assessing the project's progress and impact.

## TYPES OF PROJECT PROPOSALS

1. Concept Notes: A brief document outlining a project idea, concept notes are used to gauge interest from potential donors before developing a full proposal. They include a summary of the project, objectives, and expected outcomes.
2. Grant applications: Proposals submitted to secure funding from government agencies, foundations, or international donors. These typically require detailed plans, budgets, and compliance with specific guidelines.
3. Tender in response to a Request for Proposal (RFP): issued by a donor or funding agency. They require adherence to specific guidelines and criteria set forth in the RFP, making them highly structured and competitive.
4. Research Proposals: Specific to academic or scientific research within international development, these proposals outline the research question, methodology, literature review, and expected contributions to knowledge.

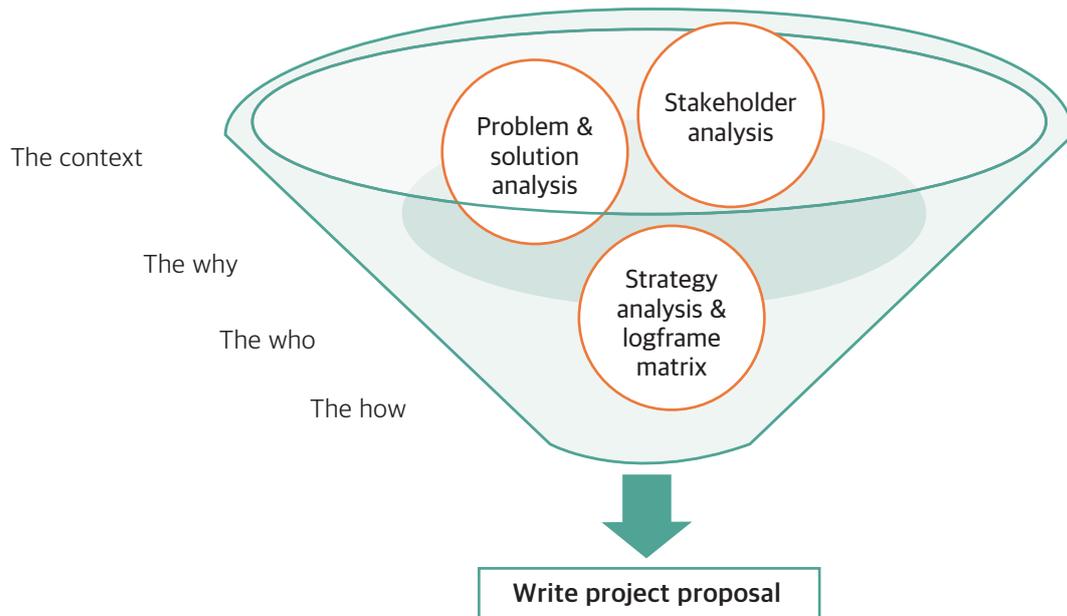
## THE PROPOSAL DEVELOPMENT PROCESS

The proposal development process can begin with either a concept note or a full Project Proposal. A concept note is a brief outline of a project idea, usually prepared before a full proposal is developed. It is used to quickly convey the essence of the project to potential funders and stakeholders and to gauge their interest before investing time in a detailed proposal. The process of developing a project proposal involves several key stages, each critical to creating a compelling and effective document. These stages include:

- 
**1. Brainstorming**
  - Generate Ideas: Identify needs and opportunities by involving stakeholders in open discussions.
  - Document Ideas: Record all potential project ideas for further exploration.
- 
**2. Research**
  - Literature Review: Gather information from credible sources to support your project's rationale and objectives.
  - Funding Sources: Identify potential donors and align their priorities with your project goals.
  - Context Analysis: Understand the broader environment in which your project will operate.
- 
**3. Writing**
  - Outline: Create a structured outline that includes all the key components of the proposal.
  - Develop Narrative: Write the proposal, focusing on clarity, conciseness, and coherence.
  - Set Goals: Clearly define the project's objectives, expected outcomes, and impacts.
  - Budget and Timeline: Detail the financial and temporal aspects of the project, ensuring they are realistic and aligned with the project's scope.
- 
**4. Editing**
  - Review: Conduct thorough reviews to ensure the proposal is clear, persuasive, and free of errors.
  - Get Feedback: Seek input from colleagues or mentors to improve the proposal.
  - Revise: Make necessary revisions based on feedback.
  - Proofread: Carefully proofread the final draft to eliminate any remaining errors.

**A good proposal should:**

- Clearly explain the need for the project (why)
- Clearly explain how you will address the need (how)
- Clearly explain who will benefit (who are the beneficiaries)
- Demonstrate buy-in from all stakeholders
- Demonstrate capacity to deliver (experience, staff)
- Demonstrate that risks have been considered
- Be realistic (preliminary timeline and budget)

**Links to External Resources and Material:**

[How to structure a winning research proposal.](#)

[Proposal Writing Best Practices: From planning to submission.](#)

[What is the grant cycle?](#)

## Module 2

# Identifying Funding Requirements



### Learning Outcomes

By the end of this module, participants will:

- Understand different types of funding sources, including government, international donors, foundations, and private sector.
- Be able to screen and evaluate potential funding opportunities based on their project's needs and eligibility criteria.
- Learn how to match project goals with donor priorities to increase the likelihood of securing funding.
- Gain insight into the common mistakes to avoid when identifying and pursuing funding sources.

### INTRODUCTION TO FUNDING REQUIREMENTS

Securing funding is a critical step in implementing successful development projects. However, not all funding sources are suitable for every project. It is essential to understand the specific requirements and priorities of each potential funder and to tailor proposals accordingly. This module introduces the process of identifying appropriate funding sources, evaluating their relevance to your project, and aligning your proposal with their expectations.

#### Sources of Funding

Understanding where to find funding is crucial for the success of your project proposal. There are various sources of funding, each with its own focus and requirements. These sources can be broadly categorised into the following types:

- 

1. **Government Agencies:** Provide grants and funds for projects that align with national priorities and policy objectives. Examples include national development funds and specific departmental grants.
- 

2. **International Donors:** Organisations such as the United Nations, World Bank, and various international NGOs that fund projects in line with global development goals.
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3. **Foundations and Philanthropic Organisations:** Offer grants to support specific causes such as education, health, environment, and social justice. Examples include the Bill and Melinda Gates Foundation and the Ford Foundation.
- 

4. **Private Sector:** Companies and corporations that provide funding through corporate social responsibility (CSR) programs, sponsorships, and partnerships.
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5. **Community and Local Organisations:** Smaller grants from local trusts, community groups, and regional funds aimed at supporting grassroots initiatives.

## SCREENING AND MATCHING FUNDING SOURCES TO PROJECT NEEDS

Conduct research on your funding source or donor grant. Not all funding sources will be a good fit for your project. It is essential to screen and match potential funders to your project's specific needs and objectives. Here's how you can effectively match funding sources to your project needs:

1. **Eligibility Criteria:** Ensure that your organisation and project meet the eligibility criteria of the funding source, including geographic focus, thematic areas, and organisational type.
2. **Alignment with Objectives:** The funding source's objectives and priorities should align with your project goals. This ensures that the funder sees the value in your project.
3. **Funding Amount and Type:** Match the scale of your project with the available funding. Small grants might be suitable for pilot projects, while large-scale initiatives may require significant funding.
4. **Application Requirements:** Check for specific requirements such as matching funds, reporting, and compliance criteria. Ensure your organisation can meet these demands.
5. **Deadlines and Timelines:** Consider the timing of the funding cycles and application deadlines. Make sure you can prepare and submit your proposal within the required timeframe.

## PRACTICAL GUIDANCE

Each funding source has its own set of guidelines and criteria for evaluating proposals. Understanding these guidelines is critical to developing a successful proposal. Here are key aspects to consider:

- **Understand the Funding Cycle:** Many funding opportunities have specific windows for applications. It's critical to plan ahead and align your proposal development process with these cycles.
- **Utilize Donor Templates:** Many donors provide templates for proposals and budgets. Always follow these formats to ensure compliance and avoid automatic disqualification.
- **Build Relationships:** Engage with potential funders before submitting a proposal. Asking clarifying questions and aligning your project with their feedback can significantly improve your chances.
- **Avoid "Shotgunning":** Don't apply to multiple grants without carefully considering each funder's priorities. It's more effective to submit fewer, highly tailored proposals than many generic ones.
- **Common Pitfalls:** Avoid common mistakes such as vague objectives, unrealistic budgets, and lack of clarity. Pay attention to detail and ensure your proposal is well-organised and professionally presented.

## KEY INSIGHTS FROM PACIFIC FUNDING EXPERTS

Proposal writing in the Pacific region draws on a unique blend of storytelling, community engagement, and localised knowledge, as demonstrated by experts from Vanuatu. Writing a successful proposal is akin to telling a story—covering the "Why, Who, Where, When, and How"—to communicate the significance of your project to donors, especially those unfamiliar with the Pacific context. This means ensuring the donor understands the geographical, cultural, and social nuances of the issue you're addressing.

“

“I advise against inflating budgets or overstating project needs, as donors often verify details and dishonesty can damage credibility. Proposals should reflect genuine community needs and be aligned with donor priorities. Furthermore, proposals should stand out by showcasing innovation and creativity, distinguishing them from other submissions.”

*Anne Pakoa, Program Manager of the Vanuatu Human Rights Coalition, emphasizes the importance of honesty and passion in proposal writing.*

”



Successful proposals often build upon projects that already have community ownership, which reassures donors of sustainability. Missack underscores the importance of data, such as community profiles, to back proposals and align them with national policies through thorough review processes.

*Willy Missack, founder of Learn to Serve Vanuatu and Advisor to the Vanuatu Climate Action Network (VCAN), highlights the value of existing community initiatives.*



## EXAMPLES OR CASE STUDIES

### Example 1: Aligning with Donor Priorities

A local NGO in the Solomon Islands wanted to implement a climate resilience project. They targeted the Green Climate Fund (GCF), whose priority was community-led climate adaptation. By aligning their proposal with the GCF's focus on community-based solutions, the NGO was able to secure funding, highlighting how local knowledge would shape their resilience efforts.

### Example 2: Evaluating Funding Amount

An organisation in Fiji wanted to scale a small livelihood project. They initially aimed for a large-scale international donor but realized the funding amount was far beyond what their project could absorb. Instead, they applied to a smaller foundation that provided seed funding, allowing them to grow sustainably.



## Activities/Exercises

### Matching Funding Opportunities to Project Needs

Participants will review a list of potential funding sources and match them to a given set of project needs (e.g., education, climate resilience, gender inclusion). They will analyse whether the funder's priorities align with the project's goals.

### Links to External Resources and Material:

[Checklist for grant applications.](#)

[Fundraising Essentials: Grant Fundraising Strategy Checklist.](#)

[Funds for NGOs.](#)

# Module 3

## Crafting a Compelling Proposal Narrative



### Learning Outcomes

By the end of this module, participants will:

- Understand the key elements of a strong proposal narrative, including problem statement, objectives, and methodology.
- Learn how to structure a proposal to clearly communicate the purpose, need, and anticipated outcomes.
- Gain the skills to write a compelling story that engages donors and emphasises the uniqueness of the project.
- Be able to align the narrative with donor priorities and expectations, ensuring clarity, coherence, and relevance.

### INTRODUCTION TO PROPOSAL NARRATIVE

The proposal narrative is the heart of your project proposal. It tells the story of why your project is needed, who will benefit, and how it will be implemented. A compelling narrative should not only explain the technical details but also engage the reader by conveying the passion and purpose behind the project. The narrative should address the "Why, Who, Where, When, and How" of the project, answering essential questions for the donor, especially those unfamiliar with the local context. A well-crafted narrative makes your proposal stand out and convinces the donor of your project's value.

In crafting a compelling project narrative, understanding the context is essential. This involves exploring various factors that can significantly influence the design, implementation, and success of a project. Some things to consider include:

- **Cultural Factor:** Gaining insight into local customs, traditions, and social norms helps ensure that the project is culturally appropriate and well-received by the community. Engaging with local communities through interviews and consultations can provide valuable first-hand insights.
- **Socio-economic factors:** Analysing economic data such as GDP, income levels, and employment rates, alongside demographic information like age distribution and education levels, helps in understanding the economic landscape. This analysis allows for a better grasp of the community's needs and capacities.
- **Environmental considerations:** This includes understanding the geographic and climatic conditions, as well as any environmental challenges like natural disasters or pollution. Knowledge of local environmental laws and policies also plays a key role in ensuring project compliance and sustainability.
- **Political and legal context:** Assessing the political climate, governance structures, and legal frameworks helps identify potential challenges and opportunities. This includes understanding local regulations affecting non-profits and foreign entities.
- **Historical context:** Reviewing past projects and significant historical events can offer lessons learned and insights into community dynamics and potential project impacts.
- **Stakeholder analysis:** helps identify key players, such as beneficiaries, local authorities, NGOs, and donors. Understanding their interests, needs, and influence can guide the project's approach and engagement strategies.

# EXAMPLE OF A GOOD NARRATIVE PROPOSAL

Title of Proposal Narrative: Empowering Rural Women Through Digital Technology

*Please describe your analysis of the problem, the context, and how this action contributes to the advancement of women and girls' human rights.*

Rural women in Naweli province face significant barriers to accessing and utilising digital technologies. These barriers include limited digital literacy, lack of access to affordable internet connectivity, and societal norms that restrict women's participation in digital spaces. As a result, rural women are often excluded from the digital economy, hindering their social and economic empowerment.

Naweli Province is the largest province on the main island of Fiji, with a significant rural population. While rapid technological advancements have transformed many aspects of society, rural communities, particularly women, often lag behind. Cultural and societal norms, coupled with limited infrastructure and educational opportunities, further exacerbate the digital divide.

*Project Goals:* To empower rural women by equipping them with the necessary digital skills and access to technology, enabling them to participate in the digital economy, improve their livelihoods, and advocate for their rights.

*Project Objectives:*

1. To provide comprehensive digital literacy training to rural women, across 4 of the largest villages in the province, covering topics such as basic computer skills, internet usage, online safety, and digital financial literacy.
2. To support women's access to the Government established community digital centres in rural areas, equipped with computers, internet connectivity, and trained facilitators.
3. To train women on the use of mobile phones for various purposes, including accessing information, conducting mobile banking, and connecting with support networks.
4. To advocate for policies and regulations that promote women's digital rights and inclusion, working with government agencies, civil society organisations, and international bodies.

By acquiring digital skills, women can access online markets, engage in digital entrepreneurship, and find remote work opportunities, leading to improved livelihoods. Digital technology in remote rural communities can connect women to support networks, educational resources, and health information, fostering social inclusion and empowerment. Finally, by bridging the digital divide, this project contributes to the realisation of women's human rights, including the rights to education, information, and participation in public life.

The primary beneficiaries of this project are rural women aged 16- 45 yrs old who lack access to digital technology and face socio-economic challenges. The project will also benefit entire communities by fostering digital literacy, promoting social cohesion, and stimulating local economic development.

The project will be implemented with the four largest villages in the province, over a period of 12 months.

This project will work with local organisations, community leaders, and government agencies to ensure sustainability and impact. The intensive training sessions, workshops, and materials will be tailored to the needs of rural women and developed by local trainers, including women and men, who can speak the local language. The Project will work with the government's digital access program and efforts which focuses on establishing community digital centres in rural areas to provide affordable internet access and technical support.

## WRITING A STRONG PROPOSAL NARRATIVE

A clear and concise project description is essential to capture the interest of funders and stakeholders. Your project description should provide a comprehensive yet succinct overview of your project, including the problem it addresses, the proposed solution, and the anticipated impact.

1. **Start with a Clear Problem Statement:** Begin by identifying the problem your project seeks to address. Use data and evidence to describe the issue, and explain why it is urgent and relevant. Be specific—donors want to know the precise challenge your project will tackle.
2. **Define Your Objectives:** Clearly state what you want to achieve through your project. Ensure your objectives are specific, measurable, and achievable within the proposed timeline. Link these objectives to the overall goal of the donor’s thematic area (e.g., gender equality, climate resilience, or education).
3. **Explain Your Methodology:** Describe in detail how your project will achieve its objectives. Include the steps you will take, the timeline for each phase, and the resources needed. Make sure the methodology is realistic, taking into account local conditions such as geographical challenges or community capacity.
4. **Address Sustainability:** Donors are often concerned about the long-term viability of a project. Explain how you will ensure the project continues to deliver benefits after the funding period ends. This could include community involvement, partnerships with government, or plans for securing future funding.
5. **Tell Your Story:** Engage the donor by framing the proposal as a narrative. Start with the need, followed by your vision for addressing it, and conclude with how your project will make a difference. Use clear, concise language, and avoid jargon. Make sure your passion for the project comes through in the writing.
6. **Align with Donor Priorities:** Ensure that your narrative fits the donor’s guidelines and thematic priorities. Tailor the language and examples to demonstrate that you understand and can deliver on their goals.

### Key Concepts/Definitions

**Problem Statement:** A clear, concise description of the issue your project seeks to address. It should be backed by data or evidence and reflect community needs.

**Objectives:** Specific, measurable goals that the project aims to achieve. These should align with both your project’s purpose and the donor’s thematic focus.

**Methodology:** A detailed explanation of how the project will be implemented, including key activities, timelines, and resources.

**Sustainability:** The plan for maintaining project outcomes beyond the funding period, ensuring long-term impact.

**Unique Value Proposition:** What makes your project stand out from others? This could be an innovative approach, community ownership, or alignment with cultural context.

Effective project objectives and outcomes are critical for guiding project implementation and measuring success. Use the SMART criteria to ensure your goals are Specific, Measurable, Achievable, Relevant, and Time-bound.

For example, instead of stating “Improve water access,” a SMART objective would be “Increase the number of households with access to safe drinking water by 20% in Province X within two years.”

<b>S</b>	<b>Specific</b>	Make your goal specific and narrow for more effective planning	
<b>M</b>	<b>Measurable</b>	Make sure your goal and progress are measurable	
<b>A</b>	<b>Achievement</b>	Make sure you can reasonably accomplish your goal within a certain time frame	
<b>R</b>	<b>Relevant</b>	Your goal should align with your values and long-term objectives	
<b>T</b>	<b>Time-based</b>	Set a realistic but ambitious end date to clarify task prioritization and increase motivation	

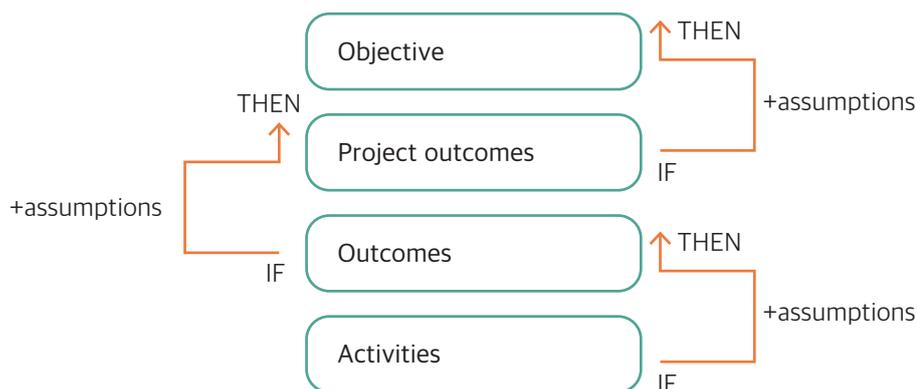
## CREATING A THEORY OF CHANGE

The Theory of Change (ToC) is a critical component of a project proposal, outlining the pathway from the current state (problem) to the desired outcomes (solutions). It articulates the assumptions and logical steps needed to achieve the project's goals.

- **Long-Term Goals:** Start by defining the ultimate outcomes your project aims to achieve. These should be broad and aligned with national or global priorities.
- **Preconditions and Intermediate Outcomes:** Break down the long-term goals into specific steps or stages that must be achieved along the way. These are the milestones that mark progress.
- **Assumptions and Risks:** Clearly state the assumptions underlying your ToC. What conditions do you assume will be in place for the project to succeed? Identify potential risks and how you plan to mitigate them.
- **Indicators of Success:** Define measurable indicators that will help you track progress and success. These could include quantitative metrics (e.g., number of beneficiaries reached) or qualitative indicators (e.g., stakeholder satisfaction).

**Problem and Cause Tree:** Participants create a problem and cause tree, identifying root causes and their effects. This helps in visualizing the underlying issues and the chain of causality.

**Objectives Tree:** Transform the problem tree into an objectives tree. Each problem's negative statement should be rephrased into a positive outcome, forming the project's objectives.



## PRACTICAL GUIDANCE

Effective communication is key to making your proposal compelling and persuasive. Use the following techniques to enhance your proposal narrative:

- **Be Specific:** Avoid vague statements about what you hope to achieve. Instead, quantify your objectives and describe exactly how your project will work.
- **Use Local Examples:** If your project operates in a unique cultural or geographical context, be sure to explain this to the donor. Donors unfamiliar with the region need a clear understanding of the local challenges.
- **Avoid Overcomplication:** Keep your language straightforward and accessible. The donor should be able to understand your project after reading it once.
- **Back Up Claims with Data:** If you claim that a problem is urgent, provide statistics or research that supports this. The more evidence you provide, the more credible your proposal will appear.



## EXAMPLES OR CASE STUDIES

### Example 1: Problem Statement

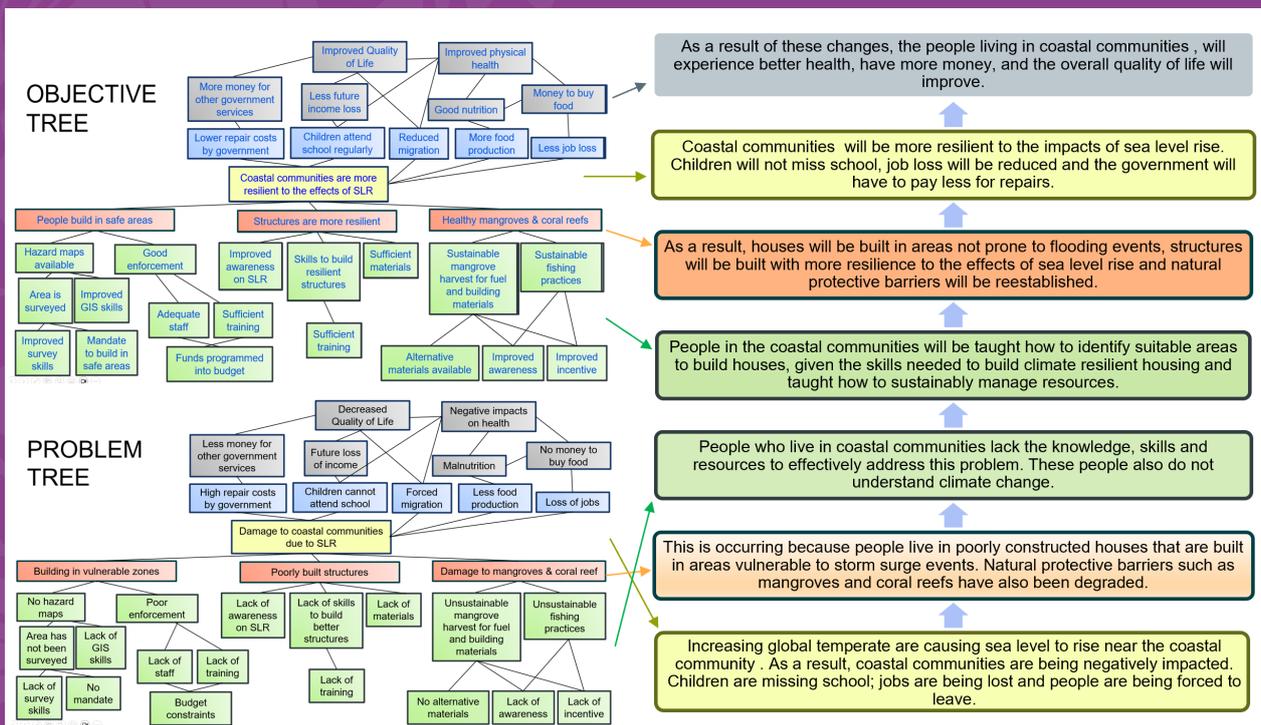
In a recent project in rural Papua New Guinea, an NGO focused on improving education for girls. The problem statement identified that only 40% of girls in the region completed primary school, due to a lack of infrastructure and cultural barriers. This clearly defined issue, supported by local education data, made a compelling case for intervention.

### Example 2: Engaging Narrative

A proposal submitted for a climate resilience project in Vanuatu used a story to illustrate the impacts of sea-level rise on a specific community. By showing the daily struggles of farmers whose crops were being destroyed by saltwater intrusion, the narrative connected emotionally with the donor while clearly framing the need for action.

### Example 3: Problem and Objective Tree

In coastal communities in Fiji, sea level rise (SLR) is forcing families to abandon their homes. Floodwaters regularly damage vulnerable housing, and saltwater ruins crops, leaving communities without food or income. With mangroves and coral reefs degraded, and little knowledge of climate risks, locals struggle to adapt. Children are missing school, jobs are disappearing, and families are being pushed to relocate, highlighting an urgent need for climate-resilient solutions.





## Activities/Exercises

### Drafting a Proposal Narrative

Participants will be given a sample project and asked to draft a narrative, including a problem statement, objectives, and methodology. They will:

- Define the problem their project will address.
- Identify 2-3 key objectives for the project, which clearly state what the project aims to achieve. These objectives should be specific, measurable, and results-oriented, outlining clear outcomes that address the problem.
- Outline the steps they will take to achieve these objectives. After drafting, participants will review each other's work, providing feedback on clarity, specificity, and alignment with donor priorities.

# Module 4

## Budget and Timeline Development



### Learning Outcomes

By the end of this module, participants will:

- Understand how to create a realistic project budget that aligns with the scope of the proposal.
- Learn how to develop a detailed project timeline that takes into account key activities, milestones, and deliverables.
- Be able to identify common pitfalls in budget and timeline development and learn strategies to avoid them.
- Gain insight into how to match the budget and timeline to the geographical, cultural, and logistical realities of Pacific Island contexts.

### INTRODUCTION TO BUDGET AND TIMELINE DEVELOPMENT

A well-structured budget and timeline are essential components of a successful project proposal. The budget should accurately reflect all costs necessary to implement the project, while the timeline outlines how and when each component of the project will be executed. This module covers the key elements of budget and timeline development, emphasising how to balance ambition with realism. Special attention will be given to ensuring that both the budget and timeline are feasible, considering the geographic, logistical, and cultural contexts of the Pacific Islands.

A well-prepared budget should be realistic, comprehensive, and align with the project narrative.

### CREATING A REALISTIC PROJECT BUDGET

1. Identify Cost Categories: Start by grouping similar expenses under defined categories. Common categories include:
  - Personnel: Salaries and wages for project staff.
  - Travel: Transportation, accommodation, and per diem for project-related travel.
  - Equipment: Purchase or rental of equipment necessary for the project.
  - Materials and Supplies: Consumables and other materials needed for project activities.
  - Consultants: Fees for external experts and consultants.

### Key Concepts/Definitions

**Budget:** A detailed estimate of costs requested to complete a project. It should be prepared with precision, reflecting all necessary expenses.

**Cost Categories:** Grouping similar costs under defined categories such as personnel, travel, equipment, and materials.

**Direct Costs:** Costs that directly benefit the specific project and are necessary to complete it. These are charged directly to the sponsored project.

**Indirect Costs (Overheads):** Also known as facilities and administrative (F&A) costs, these are associated with general operations and cannot be easily assigned to individual projects.

**Contingency Fund:** An allocation of additional funds to cover unexpected costs or delays that might arise during the project's implementation.

**Milestones:** Key points in the project timeline where major deliverables or objectives are expected to be completed

- Training: Costs associated with training sessions and capacity building.
  - Indirect Costs: Overhead costs that support the general operation of the organisation.
2. Detail Each Expense: Provide a detailed description and justification for each expense. Ensure that each item in the budget is clearly explained and directly linked to the project activities described in the narrative.
  3. Use Donor Templates: Always use the budget templates provided by donors. Ensure that your budget format matches the requirements and guidelines specified by the funding organisation.
  4. Check for Realism and Completeness: Your budget should be as realistic and complete as possible. Double-check all figures and ensure that all project activities are adequately costed.
  5. Currency: Clearly state the currency used in the budget. This is important to avoid confusion and ensure clarity.

### Example Project Proposal Budget

<b>Organisation X Grant budget</b>			
<b>Empowering women in agriculture through supporting the establishment of a women-led nursery</b>			
<b>Dec 2024 - Dec 2025</b>			
<b>Budget Item</b>	<b>Number of Units</b>	<b>Cost per Unit</b>	<b>Total (USD)</b>
<b>Personnel</b>			
Project Manager	50	400.00	20,000.00
Admin Officer	75	200.00	15,000.00
<b>Total Personnel</b>			<b>35,000.00</b>
<b>Peer Learning</b>			
Ground Travel to visit other nurseries for peer learning	10	100.00	10,000.00
Travel allowance	10	50.00	500.00
<b>Total Travel</b>			<b>10,500.00</b>
<b>Supplies &amp; Equipment</b>			
Office Supplies	2	500.00	1,000.00
Fertiliser	100	120.00	12,000.00
Pesticide and weedicide	150	15.00	2,250.00
Seeds and Seedlings	500	20.00	10,000.00
Seedling Trays	10000	2.00	20,000.00
Shade Cloths	1500	10.00	15,000.00
<b>Total Supplies &amp; Equipment</b>			<b>60,250.00</b>
<b>Contractual</b>			
Agricultural Expert	40	450.00	18,000.00
<b>Total Contractual</b>			<b>18,000.00</b>
<b>Other Direct Costs</b>			
Water Tank	3	3000.00	9,000.00
Tables	50	100.00	5,000.00
Labour (x2)	200	200	40,000.00
<b>Total Other Direct Costs</b>			<b>54,000.00</b>
<b>Total Direct Costs</b>			<b>177,750.00</b>
<b>Indirect Costs</b>			
<b>Total Indirect Costs (10 %)</b>			<b>35,550.00</b>
<b>Total Project Cost (USD)</b>			<b>213,300.00</b>

## DEVELOPING A CLEAR PROJECT TIMELINE

A project timeline is an essential tool for managing the implementation of your project. It outlines key milestones and activities over the project's duration.

1. List Key Activities and Tasks: Break down your project into specific tasks. These should cover the entire project lifecycle, from planning and preparation to implementation and evaluation.
2. Assign Timeframes and Milestones: For each task, determine the expected duration and set key milestones. Use a Gantt chart to visually represent the timeline, showing when each activity starts and ends, and how different activities overlap or depend on each other.
3. Consider External Factors: Be realistic about potential delays, especially those related to the Pacific context, such as weather conditions, transportation challenges, or local holidays. Build in extra time for activities that are likely to encounter delays.
4. Match Timeline to Budget: Ensure that the timeline aligns with the budget. For example, if certain activities require upfront investments (e.g., training workshops or purchasing equipment), this should be reflected in both the timeline and the budget.
5. Review and Adjust: After developing the initial budget and timeline, review them to ensure consistency and feasibility. Adjust as needed to account for any gaps or unrealistic expectations.

### Example Project Proposal Timeline

Organisation X Workplan and Timeline						
Empowering women in agriculture through supporting the establishment of a women-led nursery						
Dec 2024 - Dec 2025						
	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
<b>Inception phase</b>						
Recruit Project Manager						
Recruit Admin Officer						
Buy office supplies						
Procurement process for equipment						
Inception report	Milestone = Inception report					
<b>Peer learning</b>						
Ground Travel to visit other nurseries for peer learning						
Report from peer learning		Milestone = Peer learning report				
<b>Nursery set up and training</b>						
Labour recruited						
Design process						
Nursery build			Milestone = nursery completion			
Training sessions						
Install water tank						
<b>MEL and reporting</b>						
Development of MEL plan	Milestone = MEL plan developed					
Completion report					Milestone = completion	



## EXAMPLES OR CASE STUDIES

### Example 1: Accounting for Geographic Realities

In a water access project in rural Solomon Islands, the project budget included significantly higher transportation costs due to the remote location of the beneficiary communities. The timeline also accounted for seasonal disruptions, such as cyclone season, which impacted the delivery of materials.

### Example 2: Aligning Budget with Timeline

A community health project in Papua New Guinea developed a budget that included costs for training health workers, purchasing medical supplies, and conducting monitoring and evaluation. The timeline matched the budget by allocating sufficient time for training sessions, delivery of supplies, and monitoring visits. Delays in transport were accounted for by scheduling regular check-ins with suppliers and logistics companies.

### Example 2: Problem and Objective Tree

In coastal communities in Fiji, sea level rise (SLR) is forcing families to abandon their homes. Floodwaters regularly damage vulnerable housing, and saltwater ruins crops, leaving communities without food or income. With mangroves and coral reefs degraded, and little knowledge of climate risks, locals struggle to adapt. Children are missing school, jobs are disappearing, and families are being pushed to relocate, highlighting an urgent need for climate-resilient solutions.



## Group Exercise

### Drafting a Proposal Narrative

#### Developing a Project Budget

Participants will be provided with a sample project description. They will develop a detailed budget, taking into account both direct and indirect costs, geographical challenges, and a contingency fund. Participants will:

- List and categorise all project costs.
- Provide justification for each line item.
- Review the budget to ensure it aligns with the proposed timeline.

Exercise: Creating a Gantt Chart for Project Timeline Participants will use a Gantt chart template to map out the project's key activities and milestones. They will:

- Assign specific timeframes to each task.
- Identify potential delays and build in buffer time.
- Align the timeline with the project's budget and resources.

### Additional Resources/References

[How to Develop a Project Budget: A Complete Guide.](#)

[Project Budget Templates: Simple to Advanced.](#)

[Learn how to create a project budget proposal.](#)

[How to Create a Basic Gantt Chart.](#)

# Module 5

## Proposal Writing Tips and Best Practices



### Learning Outcomes

By the end of this module, participants will:

- Gain insights into essential tips for writing clear, concise, and persuasive proposals.
- Learn how to structure a proposal for maximum impact and coherence.
- Understand common pitfalls in proposal writing and how to avoid them.
- Be able to incorporate practical advice from Pacific-based experts to enhance the quality of proposals.

### INTRODUCTION TO PROPOSAL WRITING

This section dives into the key ingredients of a successful proposal. From this module you should be able to identify several essential elements of a strong project proposal and incorporate them into your own work. This is not an exhaustive list though. This module shares crucial tips for proposals, common practices to avoid, and the significance of articulating examples of previous work to demonstrate credibility and establish trust with potential partners.

Crafting a winning proposal requires careful attention to detail and a strategic approach. Here are some key tips to take your proposal from good to great:

### LAYING THE FOUNDATION: THE IMPORTANCE OF PROPOSAL STRUCTURE

A well-structured proposal is the foundation of effective communication with potential funders. Having an organized proposal ensures that your message is delivered clearly and will guide the reader through each section seamlessly. Before diving in, thoroughly understand the funder's eligibility criteria. As Sharon Tohaimae a development practitioner from the Solomon Islands emphasises, *"Sometimes we already have information on hand, but it's the way we articulate it... we must make it clear and concise."* What are their funding priorities? Are there specific populations they focus on? Familiarise yourself with their guidelines to ensure your proposal aligns perfectly.

Craft captivating introductions and impactful conclusions. The opening is your chance to grab the funder's interest. Sharon also notes that *"the language we use matters; concise, clear sentences that tell our story effectively can make a proposal stand out."* Start with a compelling statistic, a captivating story, or a thought-provoking question. Clearly outline the structure of your proposal by briefly introducing the key sections, such as the problem statement, objectives, methodology, and expected outcomes. This provides a clear roadmap, making it easier for the reader to navigate your proposal. The conclusion should summarise your key points and reiterate the value your project offers. End with a clear call to action, prompting the funder to take the next step, whether it's contacting you for further discussion or approving your proposal.

### USING VISUALS AND GRAPHICS

Leverage visuals to enhance your proposal's clarity and appeal. Incorporate visuals like charts, graphs, and images strategically throughout your proposal. Visuals can break up text, highlight key information, and make your proposal more engaging and reader friendly. As Sharon highlights, *"linking data to back up our case and demonstrate that our project addresses real issues"* strengthens the proposal's credibility. Amini Delai a Climate Finance Expert from Fiji also highlights the importance of research, suggesting that *"investigating projects that the*

*funder has previously supported helps tailor proposals to their expectations.”* Data-driven insights like community profiles, census reports, or government data tables or graphs enhance the credibility of the project and also further explain the message you are trying to convey. Ensure visuals are clear, high-quality, and directly relevant to your content. Avoid overloading your proposal with unnecessary graphics.

### PROOFREADING AND EDITING

Ensure flawless writing through meticulous proofreading and editing. As Sharon highlighted before the language that needs to be used needs to be concise with clear sentences. Proofread your proposal meticulously to ensure clarity, conciseness, and error-free writing. Typos and grammatical mistakes can create a negative impression and undermine your professionalism. Consider having someone else review your proposal for typos, clarity, and overall flow.

Many funders provide templates for proposal narratives and budgets. Utilise them to ensure your proposal adheres to their preferred format and streamlines the review process. If templates aren't available, don't hesitate to inquire with the funder directly.

Don't be shy about reaching out to prospective funders with any initial questions you might have. Open communication builds rapport and demonstrates your genuine interest in their cause.

### KEY INSIGHTS FROM PACIFIC EXPERTS

Participants from workshops held in Fiji, Tonga and the Solomon Islands, shared a broad range of best practices for proposal writing.

“

**Research** is vital—understanding the funder's mission, values, and priorities is essential, as is reviewing past funded projects to learn what has worked before. Amini also stresses the importance of engaging with funders to clarify any uncertainties and using relevant language and keywords that align with the funder's priorities. Demonstrating how your project aligns with the funder's impact goals, providing evidence of past successes, and highlighting **collaborative opportunities** are key to making a proposal stand out.

*Amini highlights the strategic aspects of proposal writing. He advises building genuine **relationships with stakeholders**, ensuring they are engaged and supportive from the beginning.*

”

“

Awareness of the local context is also crucial, and proposals should be based on **accurate baselines** and data to ensure they are grounded in reality.

*Lilu Moala a Consultant from Tonga with a Background in Climate Change echoes the need for inclusivity and highlights that proposals should reflect stakeholder views to ensure broad support and buy-in.*

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Pre-consultations with stakeholders, including beneficiaries, are necessary to ensure the project meets local needs. They also stress the importance of telling a compelling story with passion, using the “**why, who, where, how, and when**” approach, while ensuring that the **problem and objectives statements** are clearly articulated and relevant to the donor’s scope. Creativity and innovation can help differentiate a proposal, while **data-driven insights** (e.g., community profiles, census reports, or government data) enhance the credibility of the project. Partnerships, especially with government stakeholders, are also recommended to improve project sustainability. Finally, attention to detail **in writing and proofreading** is crucial to avoid errors that might affect the professionalism of the proposal.

*Sharon advises on the importance of fully understanding the **eligibility criteria** of the donor and communicating with prospective donors to clarify any questions.*



When writing proposals for local Pacific contexts, there is a distinct focus on cultural relevance, community ownership, and contextual alignment. Local proposals must demonstrate a deep understanding of the region’s unique social, cultural, and environmental challenges, ensuring that the solutions presented are culturally appropriate and aligned with traditional governance structures. Proposals in this context should prioritise engagement with local stakeholders, including community leaders, women’s groups, and other local entities that play a significant role in decision-making.



## EXAMPLES OR CASE STUDIES

### Example 1: Aligning with Donor Priorities

A proposal from a Pacific NGO aimed at enhancing youth leadership in climate resilience was successful because it closely aligned with the donor’s focus on youth empowerment and climate action. The proposal demonstrated a deep understanding of the community’s needs and offered innovative solutions that leveraged local knowledge.

### Example 2: Use of Data to Support Claims

In a proposal addressing water scarcity in rural Fiji, the team included local and international data on water quality and access to demonstrate the severity of the problem. This helped to justify the need for investment in water infrastructure.



## Activities/Exercises

This module used a panel discussion with seasoned proposal experts from the Pacific region as its main activity. The panellists shared their practical knowledge and best practices for crafting compelling proposals. They offered a unique blend of real-Pacific experiences and insider knowledge, providing you with a well-rounded understanding of what makes a proposal stand out from the crowd.

## Module 6

# Gender Equality, Disability, and Social Inclusion (GEDSI)



### Learning Outcomes

By the end of this module, participants will:

- Understand the core concepts of Gender Equality, Disability, and Social Inclusion (GEDSI) and their relevance in development projects.
- Gain the skills to conduct a GEDSI analysis and integrate its findings into project proposals.
- Identify the barriers and inequalities faced by diverse groups and learn strategies to address them in project design and implementation.

### INTRODUCTION TO GEDSI

Gender Equality, Disability, and Social Inclusion (GEDSI) is about ensuring that development interventions address the specific needs and challenges faced by marginalised groups. This includes women, people with disabilities, and other socially excluded populations. By integrating GEDSI, development projects can become more inclusive, equitable, and impactful.



*A thriving planet cannot be one that contains widespread human suffering or restricts human potential. GEDSI is key to achieving sustainable development goals and economic development.*



### STEPS OR PHASES (METHODOLOGY)

Conducting a GEDSI Analysis

1. Design: Plan the scope of your analysis. What are the specific issues related to gender, disability, and social inclusion that you need to explore?
2. Desk Review and Secondary Data Collection: Collect existing data on GEDSI issues in your project area.
3. Primary Data Collection: Conduct interviews, focus group discussions, and key informant interviews to gather first-hand insights.
4. GEDSI-Responsive Data Analysis: Analyse the data to understand disparities, access issues, and areas of exclusion. Use this information to inform your project design and implementation.

### Key Concepts/Definitions

**Gender:** The social and cultural roles, behaviours, and attributes that a society considers appropriate for men, women, and non-binary individuals. These roles are not static and can evolve over time.

**Disability:** Refers to physical, mental, intellectual, or sensory impairments that may hinder participation in society on an equal basis.

**Social Inclusion:** Ensuring that all individuals, regardless of their background, identity, or status, have equal access to opportunities, resources, and benefits.

## PRACTICAL GUIDANCE

- Ensure you use sex-disaggregated data in your research.
- Understand that traditional roles and cultural norms evolve, and projects should address how gender roles impact access to resources and decision-making.
- Develop targeted interventions for groups that face specific barriers, such as women, persons with disabilities, or marginalised ethnic groups.



## EXAMPLES OR CASE STUDIES

### Example:

In a coastal community project, it was found that men and women use natural resources differently. Men primarily engaged in fishing, while women focused on collecting shellfish near the shore. This difference was crucial for designing livelihood programs that accounted for each group's needs and ensured equitable participation.



## Activities/Exercises

### Conducting a GEDSI Analysis

Participants will review a case study and identify the key gender, disability, and social inclusion challenges in a proposed development project. Participants will answer:

- How do gender norms and cultural practices affect access to education?
- What are the barriers faced by persons with disabilities in accessing community services?
- What interventions can we design to ensure the project is inclusive of different needs and priorities?

## Additional Resources/References

[Gender equality, disability and social inclusion –Continuum and guidance](#)  
[A Toolkit for Integrating GESI in Design, Monitoring, and Evaluation](#)

# Module 7

## Climate Change



### Learning Outcomes

- By the end of this module, participants will:
- Understand the concept of climate resilience and its relevance to development projects.
- Gain the skills to integrate climate resilience considerations into project proposals.
- Identify good practices and common mistakes when addressing climate change in development projects.

### INTRODUCTION TO CLIMATE CHANGE AND RESILIENCE

Climate change refers to long-term shifts in temperatures and weather patterns, primarily due to human activities caused by burning fossil fuels. Its impacts, including rising sea levels, extreme weather events, and disrupted ecosystems, threaten both natural environments and human well-being.

Resilience in the context of climate change is the ability of communities, ecosystems, and economies to adapt, withstand, and recover from these changes. Building resilience is crucial to minimising negative impacts and ensuring sustainable development.

### STEPS OR PHASES (METHODOLOGY)

Integrating Climate Resilience into Development Projects

1. Understanding Vulnerabilities: Conduct a vulnerability assessment to identify specific climate risks affecting your project area. This might involve mapping low-lying areas or assessing socio-economic capacities to cope with shocks.
2. Designing Resilient Solutions: Develop solutions that address vulnerabilities. For example:
3. Environmental resilience: Use nature-based solutions like restoring mangroves to protect against storm surges.
4. Social resilience: Strengthen community networks and disaster preparedness through capacity-building initiatives.
5. Economic resilience: Diversify livelihoods and promote climate-smart agriculture to safeguard incomes.

### Key Concepts/Definitions

**Climate Change:** The long-term alteration of temperature and typical weather patterns in a place, largely driven by human activities.

**Resilience:** The capacity of communities and ecosystems to cope with climate-related disturbances by adjusting and adapting to changes.

**Nature-based Solutions:** Approaches that use natural systems to address climate challenges (e.g., restoring mangroves to protect shorelines).

### PRACTICAL GUIDANCE

- Start with a Vulnerability Assessment: Ensure your project begins by identifying specific climate risks, understanding which populations or ecosystems are most vulnerable, and assessing their ability to adapt. A thorough assessment helps organisations focus their efforts where they are needed most, develop solutions tailored to the specific challenges, and engage stakeholders more effectively. This process also establishes a solid baseline for monitoring and evaluation.
- Include All Dimensions of Resilience: Address not only environmental aspects but also social and economic resilience. Climate impacts are multifaceted, and projects need to reflect that.
- Use Nature-Based Solutions: Where possible, harness the power of natural systems (e.g., coral reef restoration) to mitigate climate risks while providing additional environmental benefits.

- Plan for the Long Term: Design your project to evolve as climate impacts intensify over time. Build in contingency funds and maintenance budgets to ensure sustainability.



## EXAMPLES OR CASE STUDIES

**The Malaita Community Resilience and Livelihoods (CRL) Project in the Solomon Islands was designed to address both climate resilience and livelihoods in some of the country's most vulnerable communities. The project focused on enhancing the capacity of local communities to adapt to climate change while also improving economic opportunities, with a particular emphasis on sustainable livelihoods.**

### Challenges Faced:

One of the main challenges the project faced was the geographic isolation of many of the target communities, which are in remote areas of Malaita province. These communities had limited access to resources, infrastructure, and markets, which complicated efforts to introduce new livelihood activities. Furthermore, the communities were highly vulnerable to the impacts of climate change, including rising sea levels, increased frequency of extreme weather events, and coastal erosion. The traditional farming and fishing practices, which were crucial to local livelihoods, were increasingly under threat.

Additionally, there were challenges related to community engagement and trust-building. Many of the community members were initially sceptical about the proposed interventions, as previous projects had failed to deliver tangible, long-lasting benefits. The project team needed to build trust and ensure that the communities saw the value in participating and contributing to the resilience-building activities.

### Solutions and Strategies:

To overcome these challenges, the CRL project took a community-centered approach, which involved extensive consultation and collaboration with local stakeholders. The project team worked closely with traditional leaders, women's groups, and youth representatives to ensure that the proposed interventions were culturally appropriate and aligned with community needs and aspirations. This inclusive approach helped foster trust and build local ownership of the project.

One of the project's key strategies was to leverage nature-based solutions to enhance climate resilience. For example, the project supported the restoration of mangroves along vulnerable coastlines to protect against storm surges and coastal erosion. Mangrove restoration not only improved the natural defence systems of the communities but also created new livelihood opportunities through sustainable fisheries and eco-tourism.

To address the challenge of geographic isolation, the project focused on building local capacity and developing sustainable, low-cost technologies. Training programs were provided to community members on climate-smart agriculture techniques, such as growing drought-resistant crops and using water-harvesting systems to improve water security. These interventions helped to reduce the communities' reliance on vulnerable resources and improved food security.

The project has also demonstrated that integrating traditional knowledge with scientific approaches can enhance resilience while respecting local cultures and practices. This has been a critical factor in the project's success, as it has helped to build trust and engagement with communities.



### Activities/Exercises

Developing a Climate-Resilient Project Plan Participants will work in groups to design a project proposal that integrates climate resilience. Using a case study of a vulnerable coastal community, participants will:

- Conduct a vulnerability assessment to identify climate risks.
- Design interventions (e.g., nature-based solutions, livelihood diversification).
- Present their project plan to the group for feedback.

### Additional Resources/References

[SPREP -Pacific Climate Change Portal.](#)

[U.S Climate Resilience Toolkit.](#)

[The Adaptation Principles: 6 Ways to Build Resilience to Climate Change.](#)

[SPC - Climate Change and Environmental Sustainability.](#)

# Module 8

## Developing a Monitoring, Evaluation, Learning (MEL) Framework



### Learning Outcomes

By the end of this module, participants will:

- Understand the core components of a Monitoring, Evaluation, and Learning (MEL) framework.
- Learn how to design indicators that effectively measure project progress and outcomes.
- Gain the ability to set up systems for data collection and analysis to inform ongoing project adjustments.
- Be able to integrate learning mechanisms into project design to enhance decision-making and adapt to challenges

### INTRODUCTION TO MONITORING, EVALUATION, AND LEARNING (MEL)

A strong Monitoring, Evaluation, and Learning (MEL) framework is essential for ensuring that projects achieve their desired outcomes, remain accountable to stakeholders, and continuously improve. MEL is not only about tracking progress but also about learning from what works and what doesn't and using that learning to adjust and improve the project. This module covers how to design an effective MEL framework that supports project implementation and aligns with donor expectations. MEL helps in:

- **Tracking Progress:** Ensuring that donor funds are spent as intended and that the project is achieving its objectives.
- **Identifying Problems:** Understanding challenges and contributing to their resolution.
- **Providing Evidence:** Delivering quality data and reports that back up claims with evidence for a wide range of audiences.
- **Informing Future Actions:** Knowing what works, what doesn't, and why, thus guiding future projects and strategies.
- **By integrating MEL into your project, you can ensure that your interventions are effective, efficient, and impactful.**

### Key Concepts/Definitions

**Monitoring:** The continuous process of collecting data on specific indicators to track whether project activities are on course.

**Evaluation:** A systematic assessment of a project's design, implementation, and outcomes. Evaluations are conducted at specific times (e.g., mid-term, end of project).

**Learning:** Using data from monitoring and evaluation to draw insights and make decisions to improve project design and implementation.

**Indicators and Measures:** Quantitative or qualitative measures used to assess progress toward achieving project objectives.

**Baseline:** The initial set of data collected at the beginning of a project to understand the pre-intervention context and measure future changes.

## STEPS OR PHASES (METHODOLOGY)

Different partners and donors may have specific expectations for MEL. Understanding these expectations is key to developing a framework that meets their requirements:

1. **Define Project Objectives:** Begin by clearly stating your project's objectives. The MEL framework must align with these objectives and assess whether they are being achieved. Each objective should have specific indicators for monitoring progress.
2. **Develop Indicators:** Create measurable indicators for each project objective. Indicators should be SMART (Specific, Measurable, Achievable, Relevant, and Time-bound). Use both quantitative indicators (e.g., number of participants trained) and qualitative indicators (e.g., participant satisfaction).
3. **Establish Baselines:** Collect baseline data before project implementation begins. This provides a starting point against which future project results will be measured.
4. **Set Targets:** Establish realistic targets for each indicator. These targets should reflect the desired outcomes within the project timeline.
5. **Plan for Data Collection:** Design a data collection plan, identifying what data needs to be collected, how it will be collected (surveys, interviews, reports), and who will be responsible for data collection. Ensure data collection tools are reliable and appropriate for the local context.
6. **Monitor Progress:** Use the indicators and targets to continuously monitor project progress. Set up regular reporting intervals (e.g., monthly or quarterly) to collect data and assess performance.
7. **Evaluate Outcomes:** Conduct evaluations at key stages (mid-term, end of project) to assess overall project impact, the effectiveness of the intervention, and lessons learned. Evaluations may be internal or external, depending on the complexity and requirements of the project.
8. **Integrate Learning:** Incorporate learning mechanisms into the project by holding regular reflection sessions (e.g., monthly or quarterly reviews) where stakeholders discuss the data and adapt project activities based on findings.

## MEL Good Practices and Common Shortfalls

Adopting good practices and avoiding common pitfalls can enhance the effectiveness of your MEL framework:

**Theories of Change:** A Theory of Change (ToC) is a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context.

- **MEL Matrix:** A MEL matrix is a tool used to organise and display the indicators, data sources, and methods for monitoring and evaluating a project.
- **MEL Framework Components:** Goals, objectives, outcomes, outputs, activities, and inputs.

### Identifying Existing MEL Practices and Tools

To develop an effective MEL framework, start by assessing your organisation's current MEL practices and tools:

**Existing Systems:** Review any existing monitoring and evaluation systems. Identify what is working well and areas that need improvement.

**Tools and Resources:** Take stock of the tools and resources you currently use, such as data collection instruments, reporting templates, and software for data analysis.

**Staff Capacity:** Evaluate the skills and capacities of your staff in conducting MEL activities. Identify any training or capacity-building needs.

**Good Practices:**

- **Clarity and Relevance:** Ensure that your indicators are clear, relevant, and aligned with your project goals.
- **SMART Indicators:** Develop Specific, Measurable, Achievable, Relevant, and Time-bound indicators.
- **Participatory Approaches:** Engage stakeholders in the MEL process to ensure their perspectives and experiences are included.
- **Regular Monitoring:** Conduct regular monitoring to track progress and make timely adjustments.

**Common Shortfalls:**

- **Overly Complex Frameworks:** Avoid overly complicated MEL frameworks that are difficult to implement and maintain.
- **Inadequate Baseline Data:** Ensure you have robust baseline data to measure changes over time.
- **Neglecting Qualitative Data:** Incorporate both qualitative and quantitative data to capture the full picture of your project's impact.
- **Insufficient Resources:** Allocate adequate resources, including time, budget, and staff, for MEL activities.

**PRACTICAL GUIDANCE**

- **Use a Mix of Methods:** Combine quantitative methods (e.g., surveys) with qualitative methods (e.g., interviews, focus groups) to gain a holistic understanding of project performance.
- **Adapt to Context:** Ensure your data collection methods and indicators are culturally appropriate and sensitive to the local context. Engage local stakeholders in designing the MEL framework to ensure relevance.
- **Use Technology Where Possible:** Consider using digital tools like mobile surveys or data collection apps to streamline data collection, particularly in remote or hard-to-reach areas.
- **Feedback Loops:** Establish mechanisms for feeding the results of monitoring and evaluation back into project decision-making. This allows the project to adjust activities based on evidence, rather than assumptions.

**OUTCOME HIERARCHY**

This is a structured framework that helps organize the steps a program or project takes to reach its goals, from beginning to the end. It shows the relationship between activities, outputs, and outcomes, helping to track progress toward broader goals.

Outcome Hierarchy	Definition of Level	
Goals and Objectives	Broader goals that the program outcomes are expected to contribute towards (usually refer to social, economic or environmental consequences).	Hitting the shore 
End of Program Outcomes (EOPOs)	The desired final result of the program (may be some years after the program has finished).	Ripple
Intermediate Outcomes	This relates to medium term outcomes that occur as a result of the outputs, that contribute to the achievement of program outcomes – generally includes practice and policy changes.	
Outputs	Things that are a direct result of the influence activity.	Splash
Activities	These are the program activities mostly done to bring about change behavior (or disseminate findings).	
Input	These are preliminary activities that occur before any activities associated with changing or influencing the external environment. Can include planning, research, collecting baseline data and forming partnerships.	Digging up the rocks 

## Monitoring, Evaluation and Learning (MEL) Framework at Design

### Key Evaluation Questions:

	Desired result	Indicative indicator	Data source(s)	Assumptions	Baseline (if applicable)	Target (if applicable)	Who will use the information for what
Goal	At these levels it is not expected for the MEL System to collect and analyse data						
Objectives							
End of Program- Outcomes (EOPO)			This should draw on partner systems where possible]				
Intermediate outcomes							
Outputs							
Activities	[This might not be detailed at design stage]						

### Elements that must be included in the MEL Framework at design stage:

- Desired results e.g., the program Logic as per design
- Outputs (key deliverables): Level, reach / coverage and quality of key deliverables produced.
- Assumptions as identified in the design
- Indicative indicators and information on

## DEVELOPING PROJECT INDICATORS

### What are Project Indicators?

Project indicators are markers of your project's achievements in a specific area. They represent the desired outcomes you aim to achieve and provide a way to communicate the project's achievements to others.

**Definition:** Project indicators are specific, measurable elements used to assess the progress and success of a project.

**Purpose:** They are essential for monitoring project performance, evaluating results, and ensuring that the project stays aligned with its objectives.

These indicators are further categorized into two types, Qualitative Indicators and Quantitative Indicators.

- **Quantitative Indicators:** Numeric measurements that provide data in numbers (e.g., number of workshops conducted, percentage of participants who improved their skills).
- **Qualitative Indicators:** Descriptive measurements that provide insights into experiences, opinions, and observations (e.g., participant feedback, case studies).

*Example:*

Goal: To improve literacy rates among children.

Activity: Conduct weekly reading sessions for the Children.

- Quantitative Indicator: Number of children attending weekly reading sessions.
- Qualitative Indicator: Participant feedback on the quality of reading sessions.

### Indicators should be based on the following guidelines:

**Specific:** Clearly defined and unambiguous.  
**Measurable:** Quantifiable or observable.  
**Achievable:** Realistic and attainable.  
**Relevant:** Directly related to project goals.  
**Time-bound:** Have a defined timeframe for measurement.



## MEL EXAMPLES OR CASE STUDIES

### Example 1: MEL in a Pacific Health Project

A health project in Kiribati used a MEL framework to track progress in reducing the incidence of waterborne diseases. The project established baseline data on disease rates, set specific targets for improvements, and developed indicators such as the percentage of households with access to clean water. Data was collected regularly through community health surveys, and mid-term evaluations allowed the project to adapt its approach based on findings.

## UNDERSTANDING PEOPLE, CULTURE, POLITICS AND PREFERENCE

- Different cultures have unique perspectives on knowledge and ways of living.
- These perspectives influence not only *'what'* is valued, but also *'how'* it is valued and by *'whom'*.
- Indigenous and Pacific efforts to recognise these differences have resulted in more culturally appropriate methods, revealing insights that orthodox approaches may miss.
- Organisations may also encompass diverse cultures and knowledge hierarchies, which shape internal dynamics and values.

### Pacific Rebbilib Tool:

The Pacific Rebbilib tool is a strategic framework for strengthening Monitoring, evaluation, and Learning (MEL) capacity in the Pacific Region. This tool serves as a "roadmap" that helps stakeholders in the Pacific chart a course from their current position in terms of MEL capacity to where they aim to be, considering the challenges and opportunities along the way.

### Links to External Resources and Material:

[Pacific Monitoring, Evaluation and Learning Capacity Strengthening Rebbilib](#)

[Public policy monitoring and evaluation.](#)

[Monitoring, evaluation and Learning - A toolkit for small NGOs](#)

## RESOURCE LIST: FUNDING OPPORTUNITIES FOR CIVIL SOCIETY AND COMMUNITY INITIATIVES IN THE PACIFIC

This resource list highlights funding opportunities for civil society and community initiatives in the Pacific, focusing on areas like environmental sustainability, climate resilience, economic development, gender equality, and human rights. Each initiative provides tailored support to empower grassroots and local organisations in implementing impactful projects.

[Grant Call for Kiwa Initiative Local Projects](#) - The Kiwa Initiative provides funding for projects that use Nature-based Solutions (NbS) to address climate change adaptation, focusing on biodiversity conservation, sustainable use of ecosystems, and tools to support these efforts, through very small, small, and medium grants.

[The Luxembourg-Fiji Drua Innovation Small Grants Scheme](#) - The UNDP, in partnership with the Governments of Fiji and Luxembourg, provides funding through the Drua Innovation Small Grant Scheme to support inclusive, resilient economic development in Fiji, aligning with the country's Climate Change Act and National Climate Change Policy.

[Building Back Blue: Blue Accelerator Grant Scheme](#) - The Blue Accelerator Grant Scheme, funded by UNDP, provides funding for highly promising blue economy projects aligned with national development priorities, supporting their pilot or scale-up phases with a compelling business case.

[GEF Small Grants Programme](#) - The GEF Small Grants Programme (SGP) provides funding and technical support to local civil society and community-based organisations, focusing on Indigenous Peoples, women, and youth, to create innovative solutions that address global environmental issues, improve livelihoods, and reduce poverty;

[GEF Small Grants Programme Short Stories](#)

[GEF Small Grants Programme Facebook](#)

[GEF Small Grants Programme Call for Project Concepts](#)

[Gov4Res Small Grants Initiative](#) - The Gov4Res small grants initiative provides funding for community development projects that align with government priorities, address climate and disaster risks, and prioritise gender and social inclusion.

[Direct Aid Program \(DAP\)](#) - The Direct Aid Program (DAP) provides funding for community projects in eligible countries that deliver practical outcomes in areas like education, health, women's empowerment, environmental protection, and human rights, while supporting Australia's development and diplomatic objectives.

[Team Up -Play for Equity Fund](#) - The Play for Equity fund provides small grants for community initiatives in the Pacific that promote gender and disability justice through sport and play, with a focus on disability justice and PIDSOGIESC (Pacific Islanders of diverse sexual orientation, gender identity, and sex characteristics).

[Women's Fund Fiji](#) - Women's Fund Fiji provides grants to women's groups, networks, and organisations led by diverse women and gender non-conforming people in Fiji to support projects that improve the lives of women, especially those in rural areas, with disabilities, or facing discrimination.

[Women's Fund Fiji Grants Manual](#)

[Global Greengrants Funds](#) - Global Greengrants Fund supports grassroots efforts to protect the environment and human rights by providing funding and trusting local communities to lead with solutions that address their unique needs.

## LIST OF ORGANISATIONS ENGAGED

	Organisation in the Pacific	Country
1	Action Aid	Vanuatu
2	ADRA Fiji	Fiji
3	Alliance for Future Generation	Fiji
4	Anoni Koa Mangrove Conservation (AMCA)/Ahetaha Water Conservation Association	Solomons
5	Audit Office	Samoa
6	Birth Fiji	Fiji
7	Catholic Women League	Tonga
8	Citizens' Constitutional Forum	Fiji
9	Civil Society Forum of Tonga - GEF Small Grants programme	Tonga
10	Counterstroke Fiji	Fiji
11	Drua Sailing Experience	Fiji
12	Duavata Collective	Fiji
13	Empower Pacific	Fiji
14	Fiji Bee Association	Fiji
15	Fiji Council of Churches/ World Day of Prayer	Fiji
16	Finding Islands Tours	Fiji
17	Foundation 1	Vanuatu
18	Freshwota Women's Council	Vanuatu
19	Further Arts	Vanuatu
20	Girl Guides Association of Tonga / Hala'ovave YSA	Tonga
21	Global Green Grants Fund	Fiji
22	Green Entrepreneur	Samoa
23	Hala'ovave Youth	Tonga
24	Hexagon Water Specialist	Vanuatu
25	HOMES OF PEACE & EMPOWERMENT (HOPE) TRUST TRUST	Solomons
26	Homes of Peace and Empowerment (HOPE Trust)	Solomons
27	Jay Vee Investments	Fiji
28	Kasabia Ltd	Fiji
29	Kivhans Indigenous Vanuatu	Vanuatu
30	KOGALA Tribal Organisation	Solomons
31	Kogala Tribe Forest Conservation Association (KTFCA)	Solomons
32	Laren Hi'ilani Homes & Rental	Samoa
33	Leadership Fiji	Fiji
34	Learn to Serve Vanuatu	Vanuatu
35	Leduas Art Collection	Fiji
36	Live & Learn Tonga	Tonga
37	Live and Learn Environmental Education	Fiji
38	Lupus Foundation of Fiji	Fiji
39	Mai Masina Green Belt (MMGB)	Solomons
40	Masoemarama Women's Association	Vanuatu
41	Ministry of Natural Resources and Environment	Samoa
42	Motari Tanbulm	Vanuatu
43	Muanivatu Trails	Fiji

	Organisation in the Pacific	Country
44	Nadroga Navosa Provincial Office	Fiji
45	Nakoralam Youth	Vanuatu
46	Nambawan Family	Vanuatu
47	Nature's Way Cooperative	Fiji
48	Northern Ward Council of Women	Vanuatu
49	Ohai Tonga	Tonga
50	Pacific Menstrual Health Network	Vanuatu
51	PACLII	Vanuatu
52	Port Vila City Council of Women	Vanuatu
53	Premier Group	Solomons
54	Ra DCOSS/FCOSS	Fiji
55	Rainbow Pride Foundation Fiji Limited.	Fiji
56	RGF	Solomons
57	Samoa Chamber of Commerce and Industry Incc	Samoa
58	Samoa Conservation Society	Samoa
59	Samoa Reefs of Hope	Samoa
60	Samoa Umbrella for Non Governmental Organizations	Samoa
61	Samoa Victim Support Group	Samoa
62	Sea Development Committee	Vanuatu
63	Seventh Day Adventist Church	Fiji
64	Solomon Islands Climate Action Network (SICAN)	Solomons
65	Solomon Islands Women in Business Association (SIWIBA)	Solomons
66	The 10,000 Toes Campaign	Fiji
67	Tonga Community Development Trust	Tonga
68	Tonga Leiti Association	Tonga
69	Tonga National Council of Churches	Tonga
70	Tonga Off-shore Mining Limited	Tonga
71	Tonga Women in ICT	Tonga
72	Tu'atakilangi Women Committee	Tonga
73	USP	Vanuatu
74	Vanuatu National Youth Council	Vanuatu
75	Vanuatu Rugby	Vanuatu
76	Vanuatu Young Women for Change	Vanuatu
77	VBTC	Vanuatu
78	Waaoho community conservation	Solomons
79	West Are'Are Rokotanikeneni Association	Solomons
80	Widows Association	Vanuatu
81	Women Entrepreneurs Business Council	Fiji
82	World Bank	Fiji
83	XLR8	Vanuatu
84	Young Women Parliamentary Group (YWPG Network)	Solomons
85	Youth Advocate for Integrity Solomon Island (YAISI)	Solomons
86	Youth Challenge	Vanuatu





